

iPECS

CCS Desk

User Manual

Please read this manual carefully before operating your set. Retain it for future reference.

iPECS is an Ericsson-LG Brand



Revision History

ISSUE	DATE	DESCRIPTION OF CHANGES
1.8	2014-02-28	Applied new BI

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1. iPECS CCS SINGLE SERVER INSTALL

1.1 Pre-Installation Requirements

The requirements for iPECS CCS is divided into three parts:

1.1 System Requirements

1.2 TAPI Requirements

1.3 Telephony Requirements

1.1.1 System Requirements

The **Server and the Client workstations** must meet the following minimum specifications.

CCS Recommended Hardware

Install Scope	Up to 15 Agents with 100 Calls Maximum Per Day	Up to 30 CCS Agents with 300 Calls Maximum Per Day	Up to 50 CCS Agents with 1000 Calls Maximum Per Day	More than 50 CCS Agents with more than 1000 Calls Per Day
Dedicated Server Required	Yes	Yes	Yes	Yes
Dedicated SQL Server Required	No	No	Yes	Yes
Virtual Server Possible	Yes	Yes	Yes	Yes
Operating System	Windows 7 Professional or Windows Server 2008 R2	Windows 7 Professional or Windows Server 2008 R2	Windows 7 Professional or Windows Server 2008 R2	Windows Server 2008 R2
CPU	I3 2120 3.3GHz	I3 2120 3.3GHz	I3 2120 3.3GHz	I3 2120 3.3GHz
RAM	4 GB	4 GB	6 GB	8 GB
Disk Space	40 GB	40 GB	100 GB	200 GB
USB Slot	Depends on CCS Record license			
Network Card				
Additional Requirements:	PBX TAPI driver must be installed. Caller ID must be enabled on the trunk lines			

CCS Recommended Hardware		
Install Scope	Client	Client and Manager

Operating System	Windows 7 Professional	Windows 7 Professional
CPU	I3 2120 3.3GHz	I3 2120 3.3GHz
RAM	1 GB	2 GB
Disk Space	10 GB	10 GB

1.1.2 TAPI Requirements

→ Follow the **TSP Installation Guide for CCS** document.

The TSP driver is used by TAPI to allow the communication between the server and the PBX.

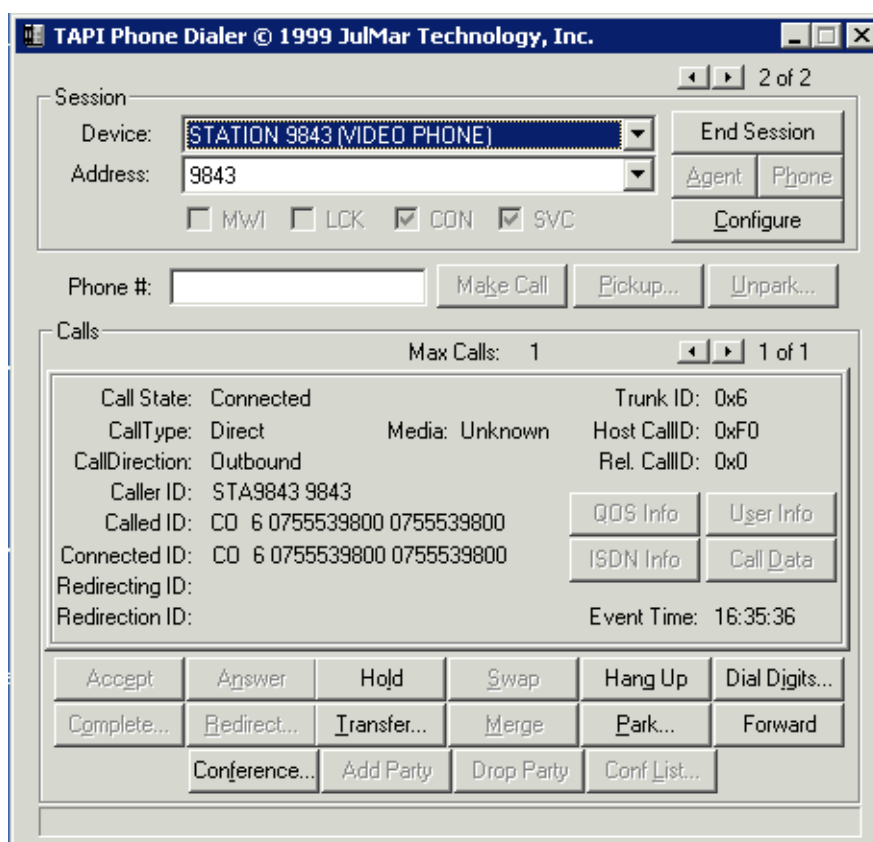
Once the installation is finished, we need to test that the TAPI device is working correctly.

→ There is a free program called **TAPI Soft Phone** that allows you to monitor / control telephony devices through TAPI in a similar fashion to CCS Desk. The application is downloadable from the following link:

http://www.julmar.com/tapi/native-tapi-samples/tapi_soft_phone.zip

→ Run a few **checks** to confirm telephony is working correctly:-

- Ensure all TAPI devices are listed.
- Start a session on the nearest extension and ensure control can be achieved.
- Lift handset and view the devices changed status, make a call, hang-up a call etc.



1.1.3 Telephony Requirements

There are additional telephony requirements and configurations that must be completed when using Dialogic HMP:

→ PBX must have sufficient 'SIP Phone' and 'CCS SIP' licenses.

If CCS Q is licensed with 4 ports, the number of licenses required for each category is 4.

→ SIP phones must be configured with the following settings:

- Registering mode = REGISTER
- Registration Timer Usage = ON
- Registration Time = 60
- DTMF = INFO (RELAY)

→ Create an **ACD hunt group** with all the SIP devices as its member.

1.2 Installation

1.2.1 CCS Single Server Install

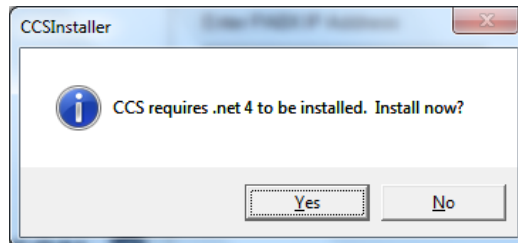
This is a guide for a new install of all CCS products on a Single Server

(i.e. all CCS software and databases will be installed locally)

Step 1 - Run the **CCSInstaller** application with Administrator privilege.



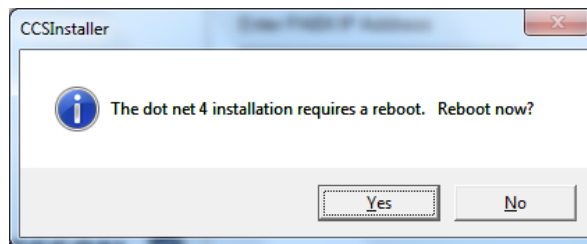
Step 2 - If **Microsoft .NET Framework 4.0** is not already installed, you will receive the message to install it → Select **Yes**.



The installation may take a few minutes to complete.

NOTE

You will be prompted to **reboot** your system once the install completes. Please ensure you do the reboot before continuing with the install



Step 3 - Once you log back in the CCS Installation will continue and you will receive the Option to Install the Client or Server → Select **Single-Server Installation** → Click **Forward**.

The screenshot shows the CCS installation wizard. On the left is the CCS logo and the Ericsson and LG logos. The main area is titled "Please select install type" and contains three radio button options: "Client Installation" (unselected), "Single-Server Installation" (selected), and "Multi-Server Installation" (unselected). Below each option is a brief description of what it installs. At the bottom right, there are three buttons: "Back" (left arrow), "Forward" (right arrow), and "Cancel" (red X).

Step 4 - At the next screen you will need to enter your **CCS license code and PABX details**

Software Registration Code – the CCS license package code

PABX IP Address – the IP address of the iPECS MFIM

PABX Password – the administration password for iPECS

The screenshot shows the software registration form. On the left is the CCS logo and the Ericsson and LG logos. The main area has three input fields: "Enter Software Registration Code" with a placeholder of "XXXXXXXXXX", "Enter PABX IP Address" with "10.10.10.1", and "Enter PABX Password" with "****". At the bottom right, there are three buttons: "Back" (left arrow), "Forward" (right arrow), and "Cancel" (red X).

Step 5 - Complete the **software registration form**.

The iPECS serial number that will be linked against the license is shown at the end of the form. → Click **Forward**.

CCS

ERICSSON LG

Contact Name

Email Address

Company Name

Web Page

Street

Suburb

State

Country

Got package details, loading ...

Back Forward Cancel

CCS

ERICSSON LG

State

Country

Phone Number

Region/City

PostCode

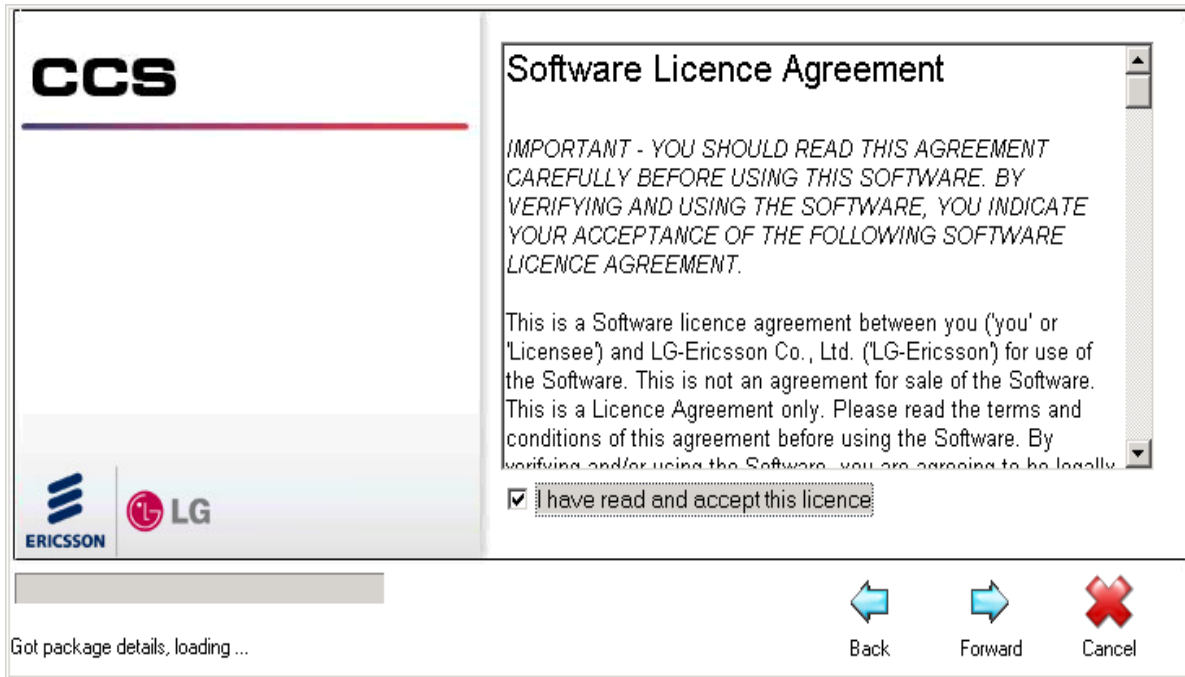
Reseller Name

Pabx Serial Number

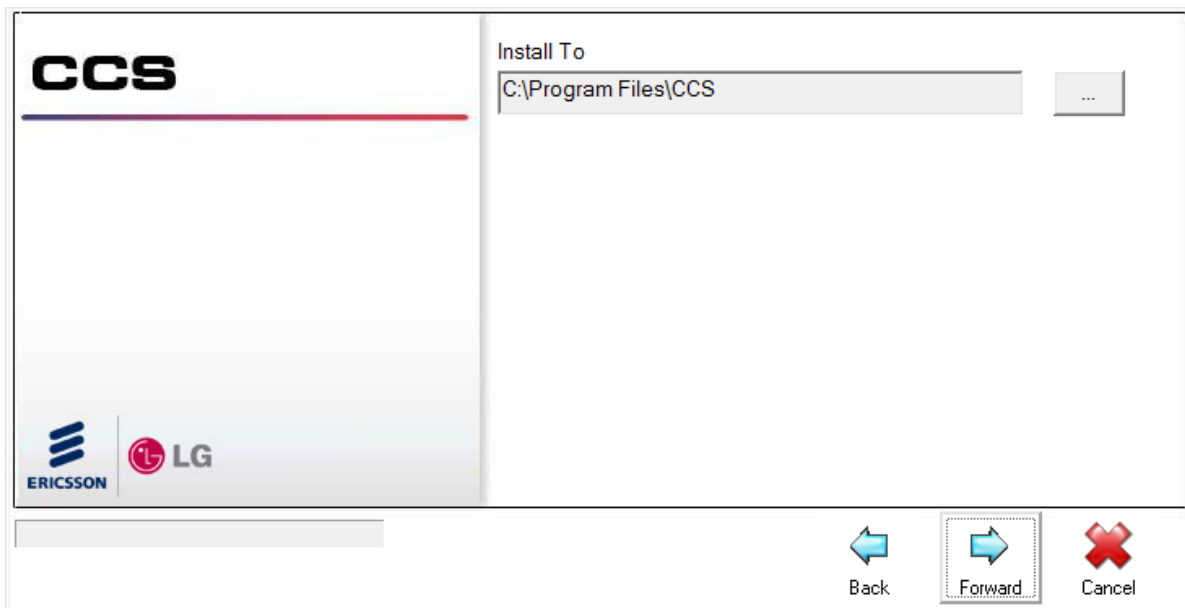
Got package details, loading ...

Back Forward Cancel

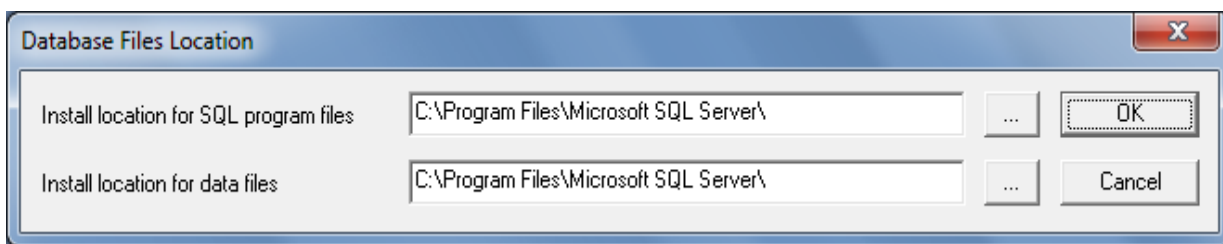
Step 6 - Read and agree to the **CCS Software License Agreement** → Click **Forward**.



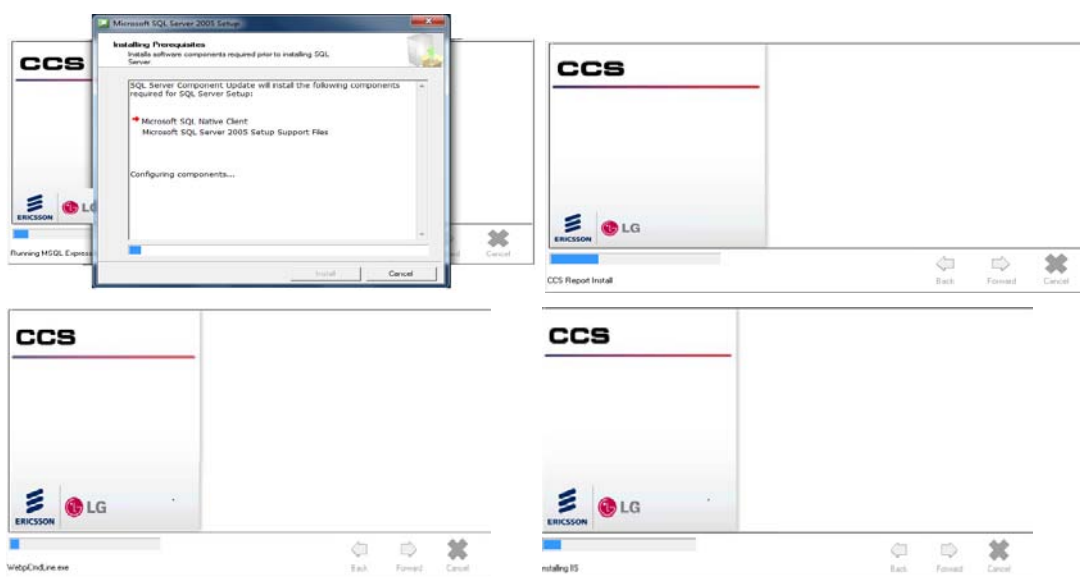
Step 7 - Confirm the **installation path** for the CCS program files → Click **Forward** to start the installation.



Step 8 - The CCS Installer will check if **Microsoft SQL Server** (default instance) has been installed on the machine. If not, the Installer will have to install the SQL Server first thus asks for the location to store the database files → Click **OK**.

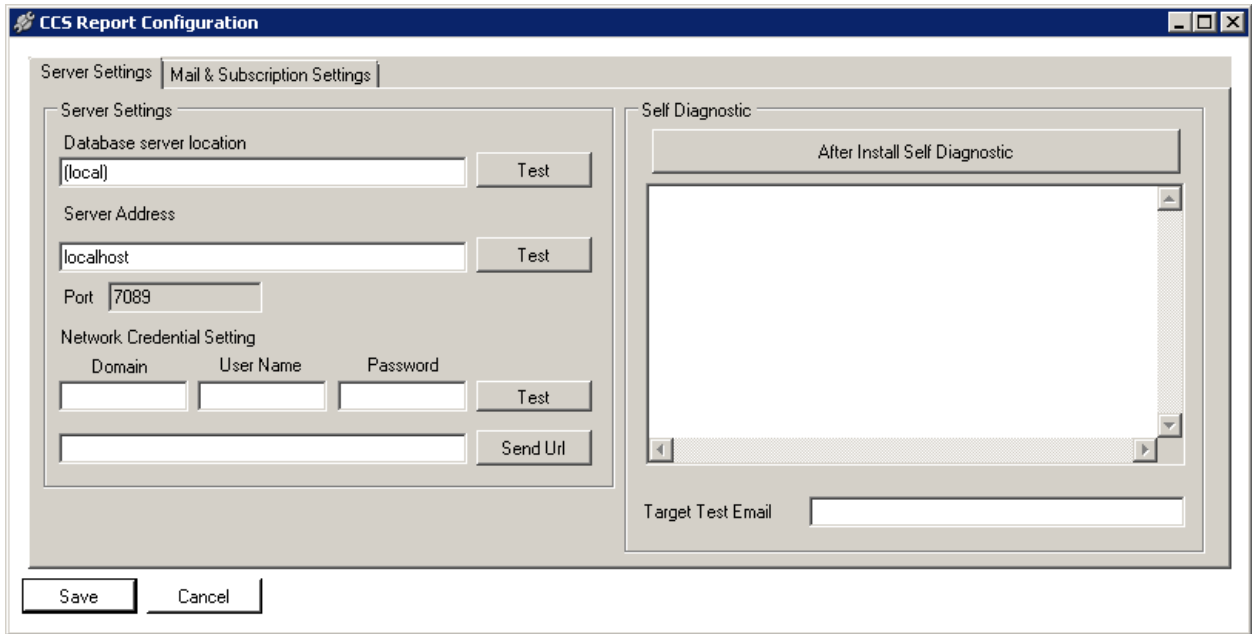


Step 9 - The CCS Installer will start **installing each component** to completion. You will then get to the CCS Report Configuration Window as shown in the next step.



Step 10 - CCS Report Configuration

There are 2 tabs which require configuration:



Server Settings

Database Server Location – the address of the machine that runs CCS Report database. Click ‘Test’ button to test the connection.

Server Address – the address of the machine that runs CCS Report Server. Click ‘Test’ button to test the connection.

Port – the port number to connect to CCS Report Server. This setting is read-only.

Network Credential Setting – specify a Windows account that has administrator privilege. This is used for temporary files during subscription, export and tests.

The other configurations in this tab are not required at this stage.

The screenshot shows a window titled "CCS Report Configuration" with two tabs: "Server Settings" and "Mail & Subscription Settings". The "Mail & Subscription Settings" tab is active. It is divided into two sections: "Mail Settings" and "Subscription Settings".

Mail Settings:

- Host: localhost
- Port: 25
- Username: (empty)
- Password: (empty)
- Domain: (empty)
- Timeouts: 60000 seconds

Subscription Settings:

- File Path: (empty)
- Sender Email Address: (empty)
- Max File Limit (kB): 10000

At the bottom of the dialog are "Save" and "Cancel" buttons.

Mail Settings

Host – the name of the SMTP email server.

Port – the port number for SMTP.

Username – the user account to use SMTP.

Password – the password to the SMTP user account.

Domain – the domain for the SMTP user account, if required.

Timeouts – the time it waits when attempting to connect with the SMTP server.

Subscription Settings

File Path – the address to store the subscription file for server file sharing. This can be set to a network UNC path e.g. `\\server\folder`, however, the network credential setting must have enough access to write into this folder.

Sender Email Address – the 'From' address when sending email from CCS Report Web.

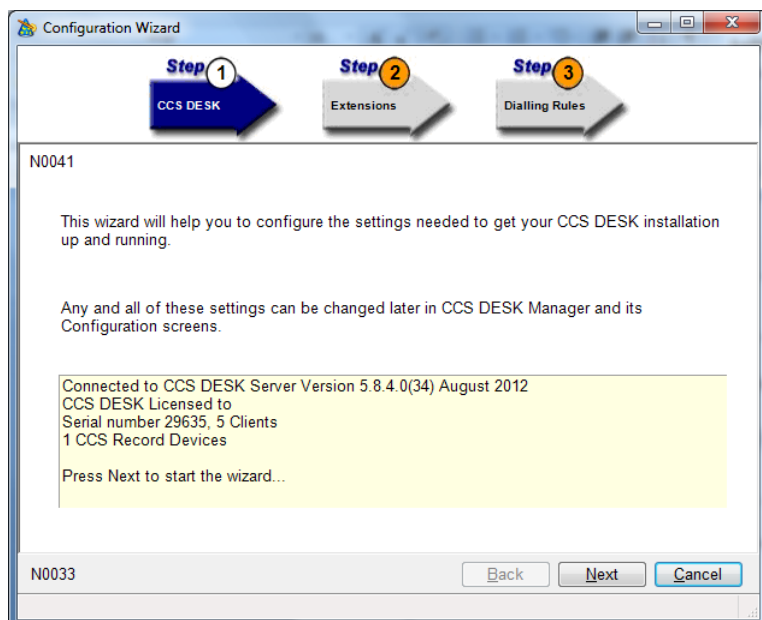
Max File Limit (kB) – the maximum number of bytes allowed by the SMTP email server.

→ Press the **Save** button after completing the configurations.

Step 11 - The **CCS Desk Configuration Wizard** will be launched next.



Step 11.1 - The **CCS Desk license information** is displayed → Click **Next**.

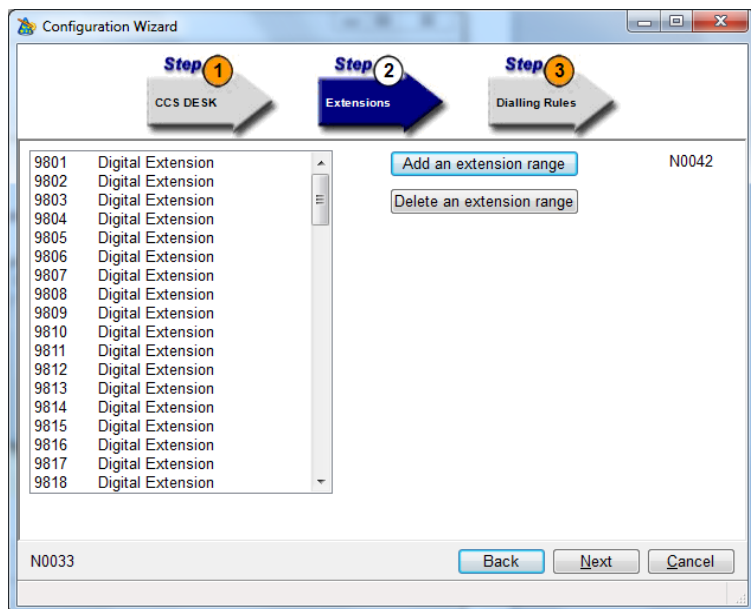


Step 11.2 - Click **Add Extension Range** → Specify the **extension numbers** in the PBX system that will be used by the CCS system → Click **Next**.

Note:

IP extensions / softphones should be added as Digital Extensions.

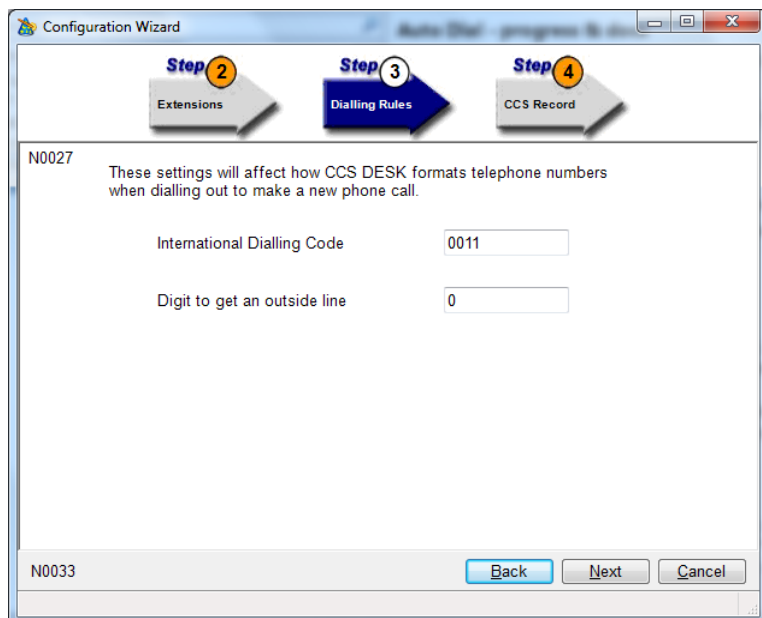
SLT or SIP extensions should be added as Analog Extensions.



Step 11.3 - Enter the **prefix for international dialling** and the **prefix to access an outside line** with the PBX.

Note

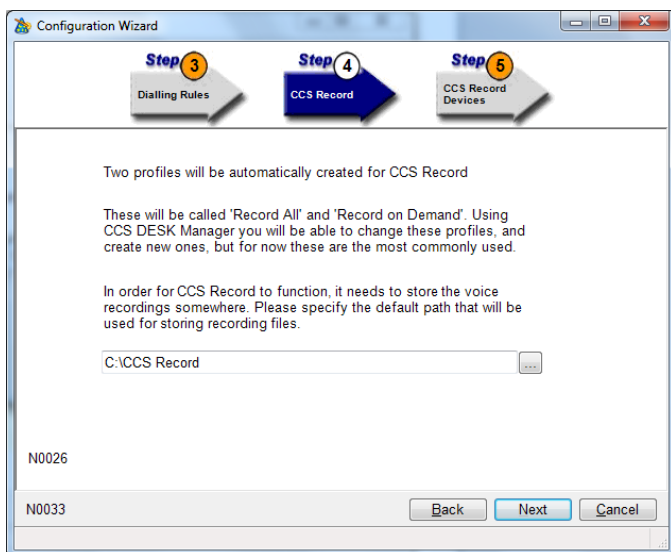
This configuration must be made identical with the configuration in Windows' **Phone and Modem Options** → Click **Next**.



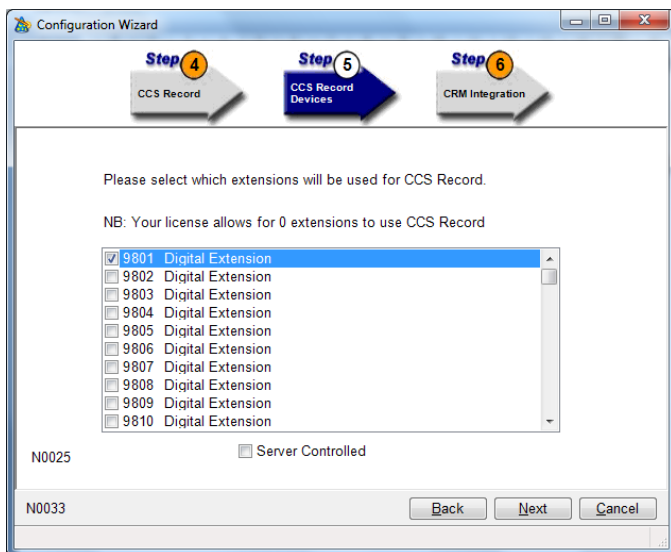
Step 11.4 - If your license contains CCS Record license for **voice recording**, the next couple of steps will be activated to allow some configuration on the call recording system.

Please consult Section 9 for further information.

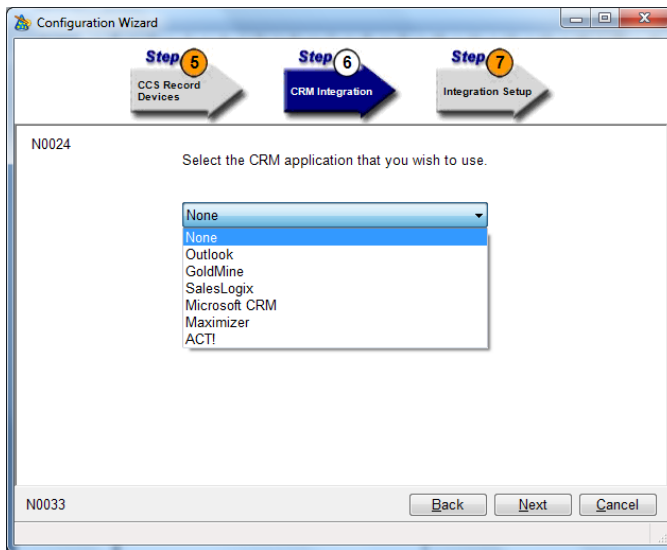
→ **Specify the path** where the voice recordings will be stored.



Step 11.5 - Select the **devices** to have external calls recorded → Click **Next**.

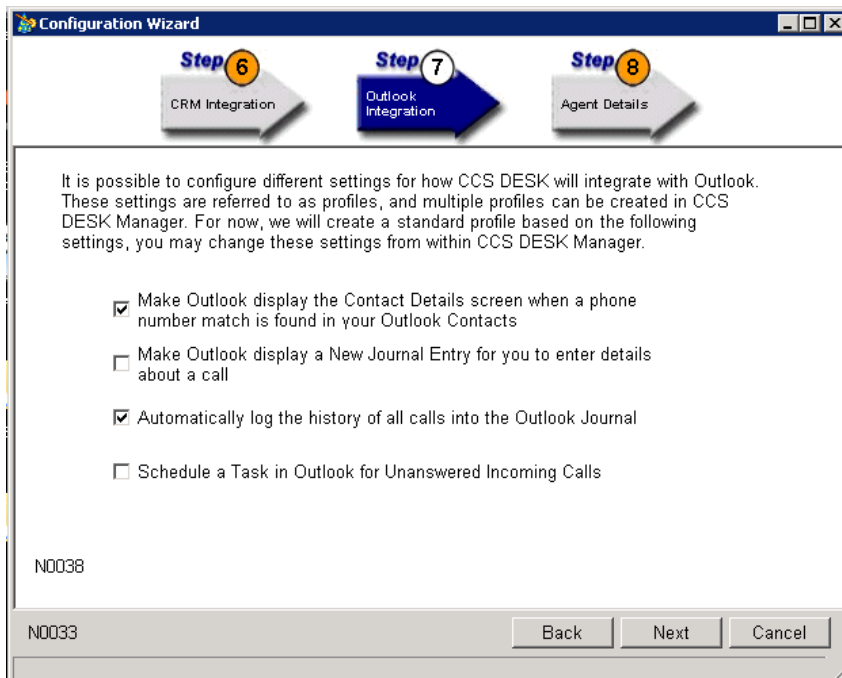


Step 11.6 - **Select the CRM / Database application to be integrated with CCS Desk** →

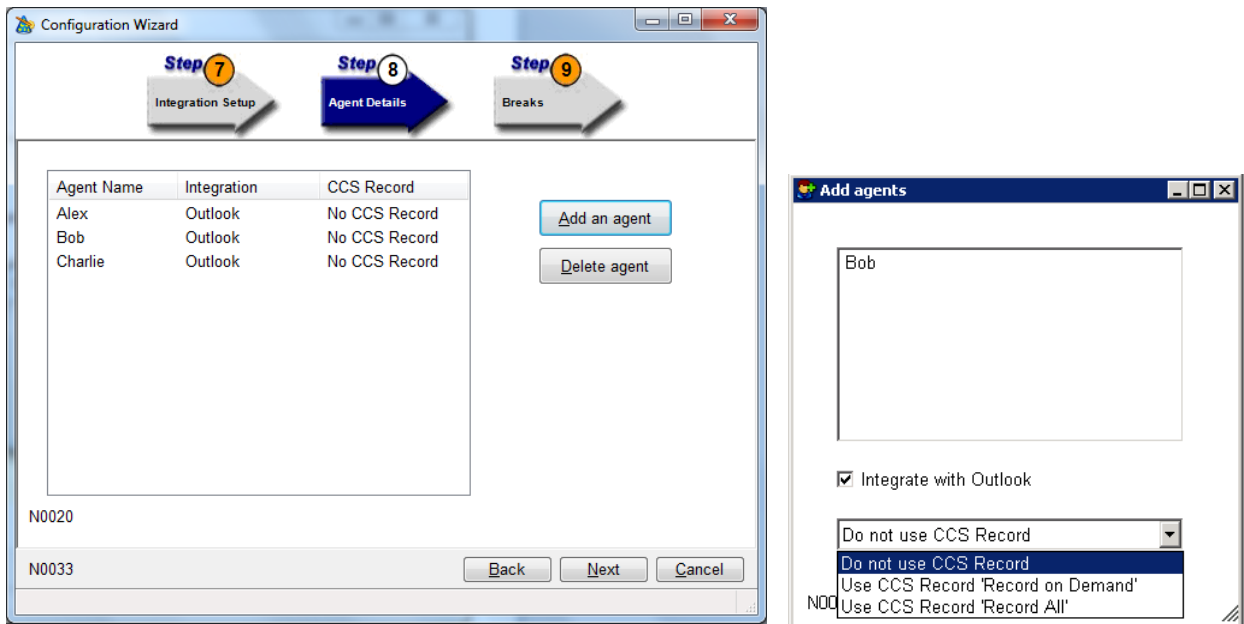


Step 11.7 - Depending on the selection at Step 12.6, this step will guide on the integration features you wish to enable → Enable the integration features as required → Click **Next**.

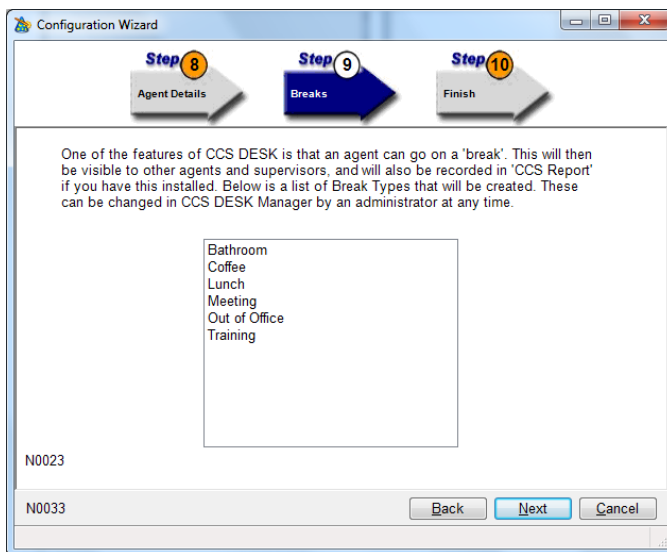
Please consult Section 6 for more information on the integration features of CCS Desk.



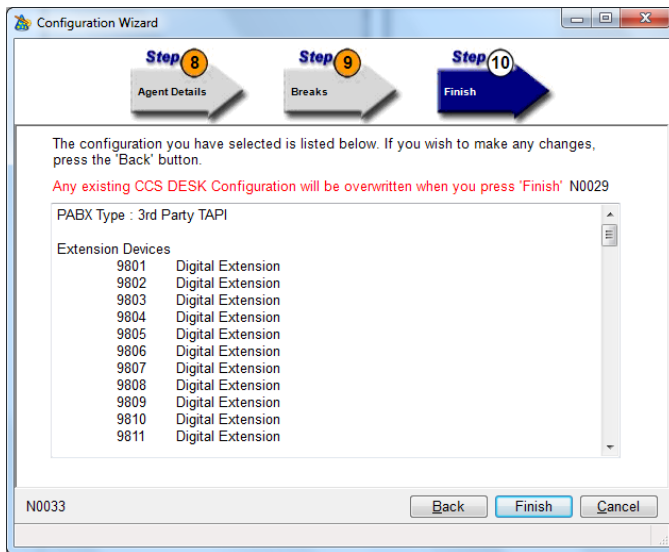
Step 11.8 - Click **Add Agents** → Enter the **name of agents** and specify optionally enable its **Integration** feature and the **CCS Record** profile.



Step 11.9 - The wizard displays a number of **break status** which have automatically been created → Click **Next**.

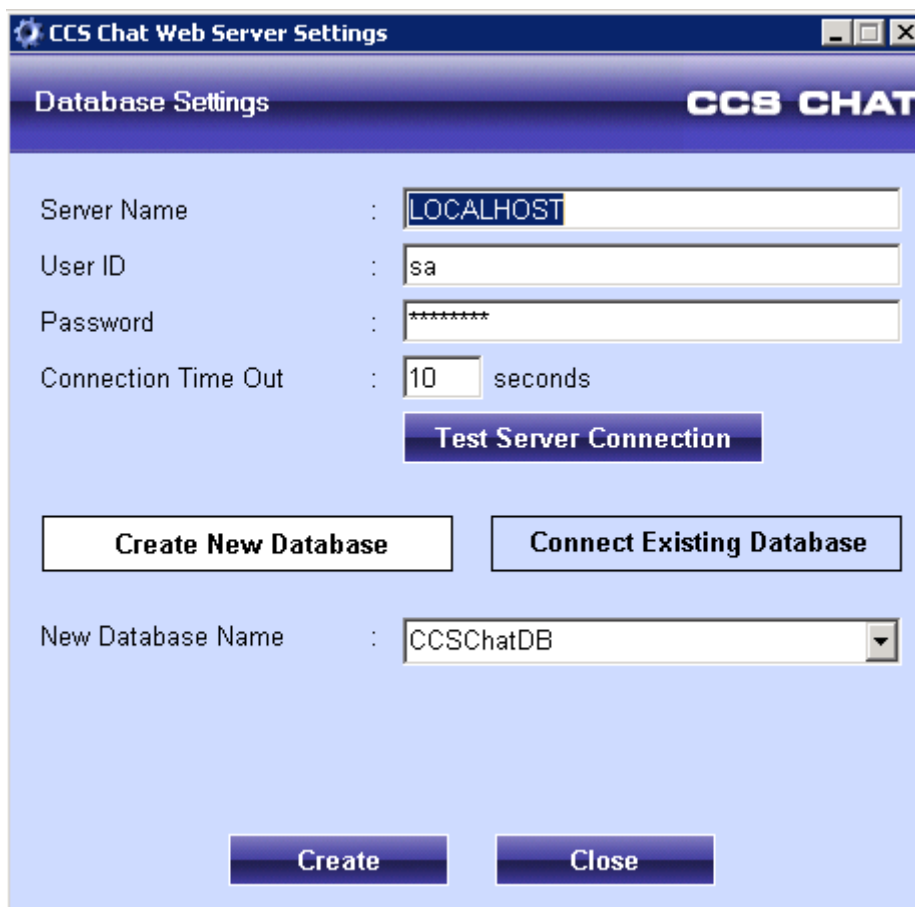


Step 11.10 - The last step will show you a **Summary** of the selected wizard configurations. → Click **Finish** to complete the wizard and continue with the install.



Step 12 - The installer will install a few more components and you will then be prompted with the window to configure **CCS Chat Web Server Settings**

This application helps us to create the **SQL database for CCS Chat**



Server Name – the machine name or IP address of the server machine, followed by the instance name if applicable e.g. RED\CCSCHAT

User ID – the SQL username. Use 'sa'.

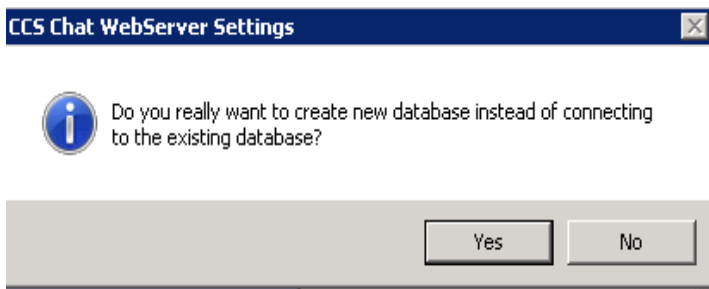
Password – the password to SQL account i.e. the 'sa' password

Connection Time Out – keep default

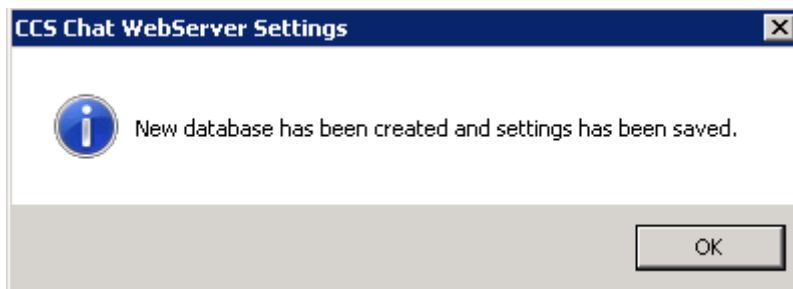
New Database Name – keep default

→ Click **Create New Database** → click **Create**.

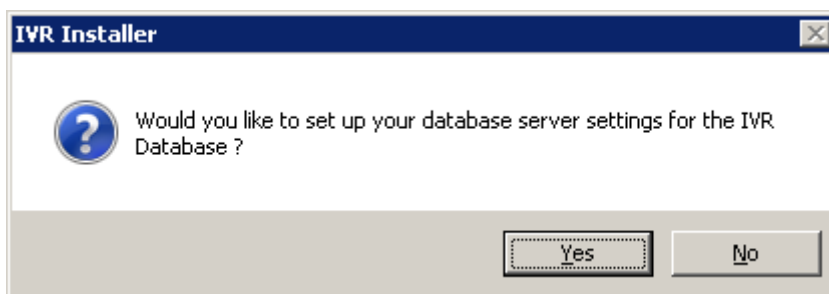
→ You may receive a pop up confirming you want the database to be created → Select **Yes**.



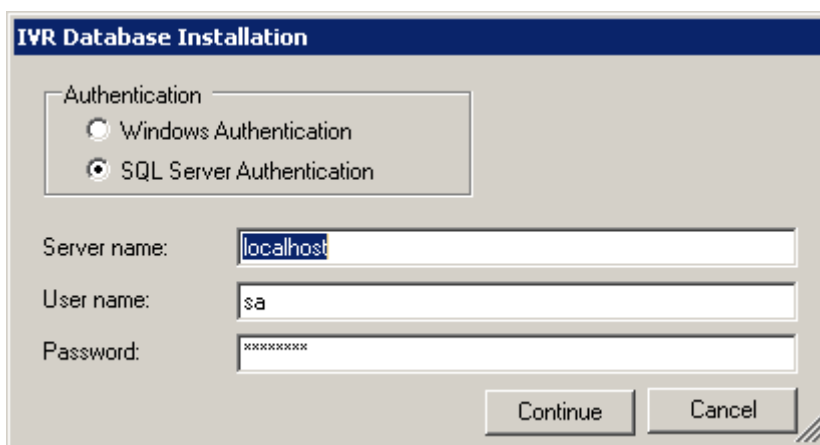
→ Select **OK** to confirm your CCS Chat DB creation and proceed with the installation



Step 13 - The installer will start installing CCS IVR. CCS IVR installation requires configuration to the **CCS MSSQL Server** → Select **Yes**.



→ Enter the correct settings to connect to the CCS MSSQL Server.



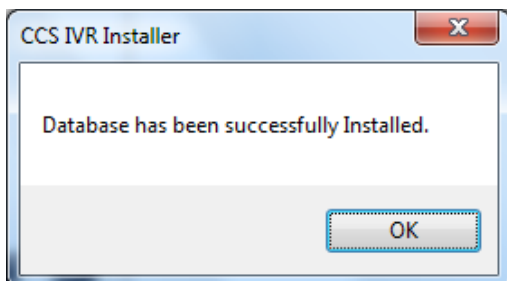
Authentication – the authentication mode for SQL Server. Always use SQL Server Authentication unless a trusted server connection has been configured on the SQL Server.

Server Name – the machine name or IP address of the database server machine

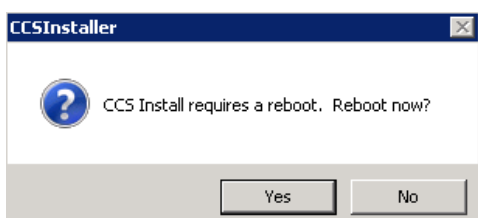
User ID – the SQL username.

Password – the password to SQL account

→ Click **Continue** → You will receive confirmation that the database has been successfully created.

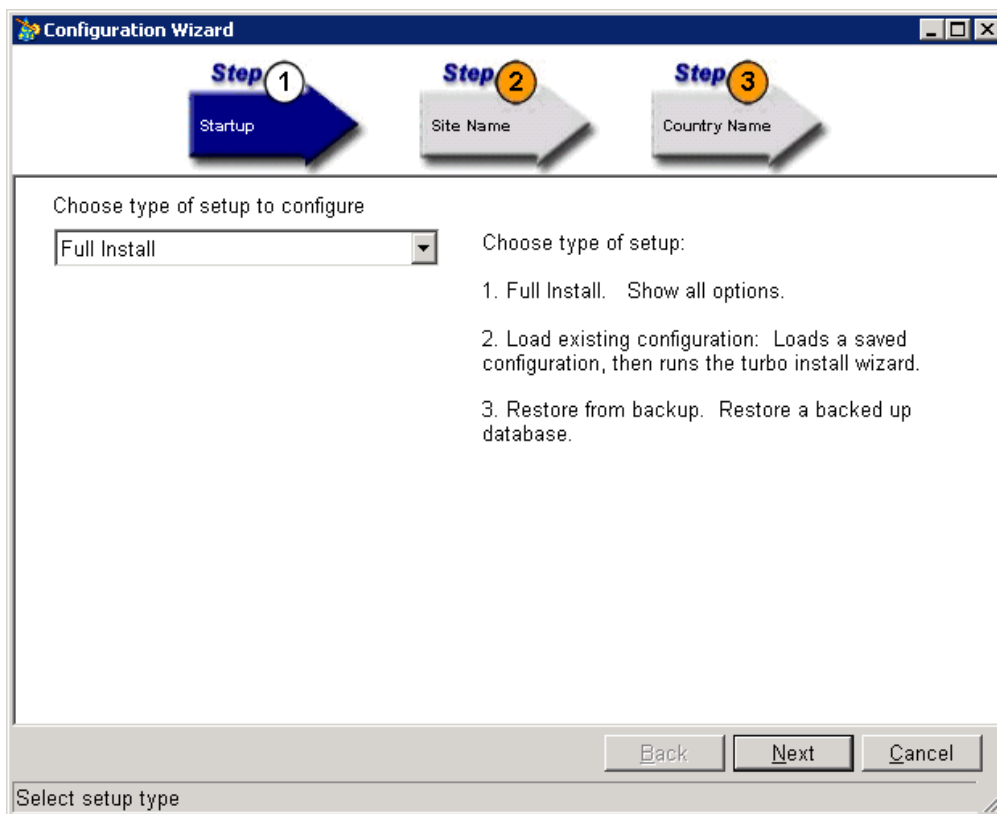


Step 14 - You will be prompted to **Reboot** → Select **Yes**.



Step 15 - After reboot, CCS Report Server will be started automatically together with **CCS Report Configuration Wizard**.

Step 15.1 - You will need to select your **install type** → Click **Next**.



There are 3 available options:

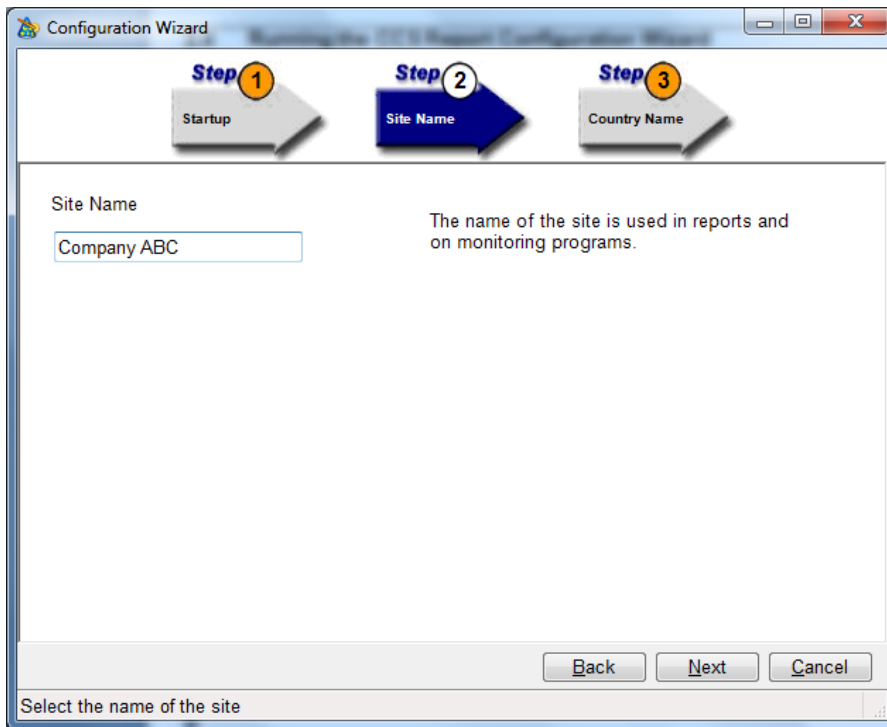
Full Install – run each step of the configuration wizard.

Load from existing configuration – use a saved export file from the configuration wizard to create the new CCS Report configuration wizard.

Restore from Backup – use a Microsoft SQL backup file of the CCS Report database to create the new CCS Report configuration.

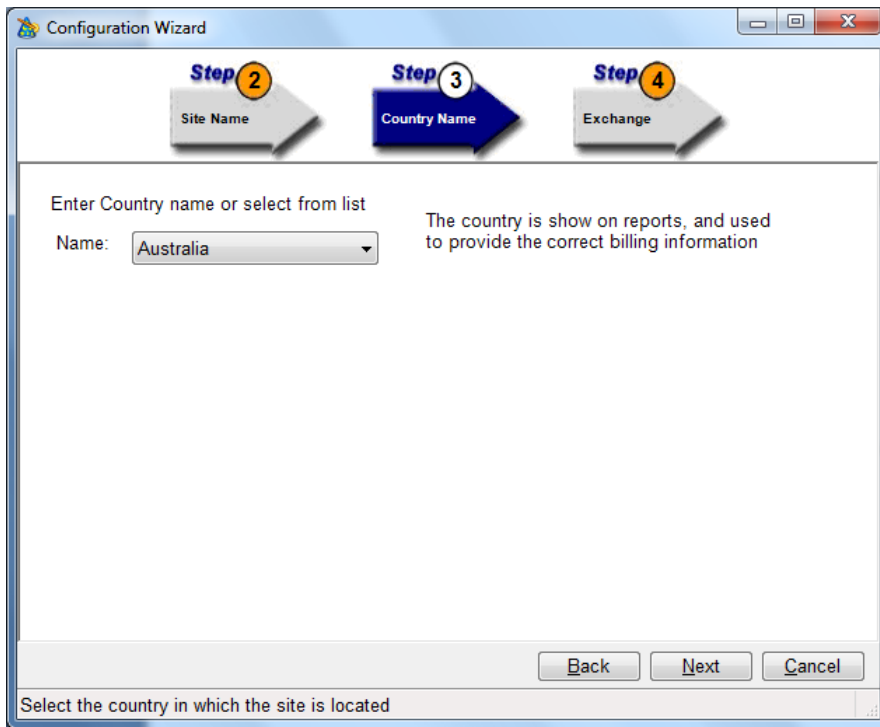
→ Select **Full Install** → Click **Next**.

Step 15.2 - Enter the **site name** → Click **Next**.



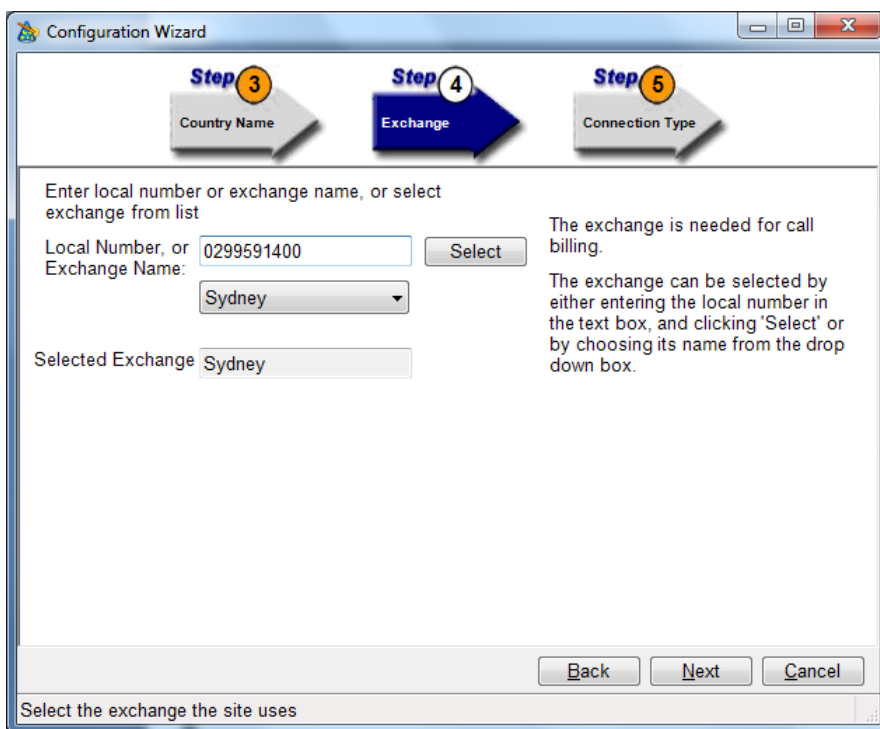
Site Name – the name of the site.

Step 15.3 - Enter the **Country Name** for this site → Click **Next**.



Name – select the country for this site.

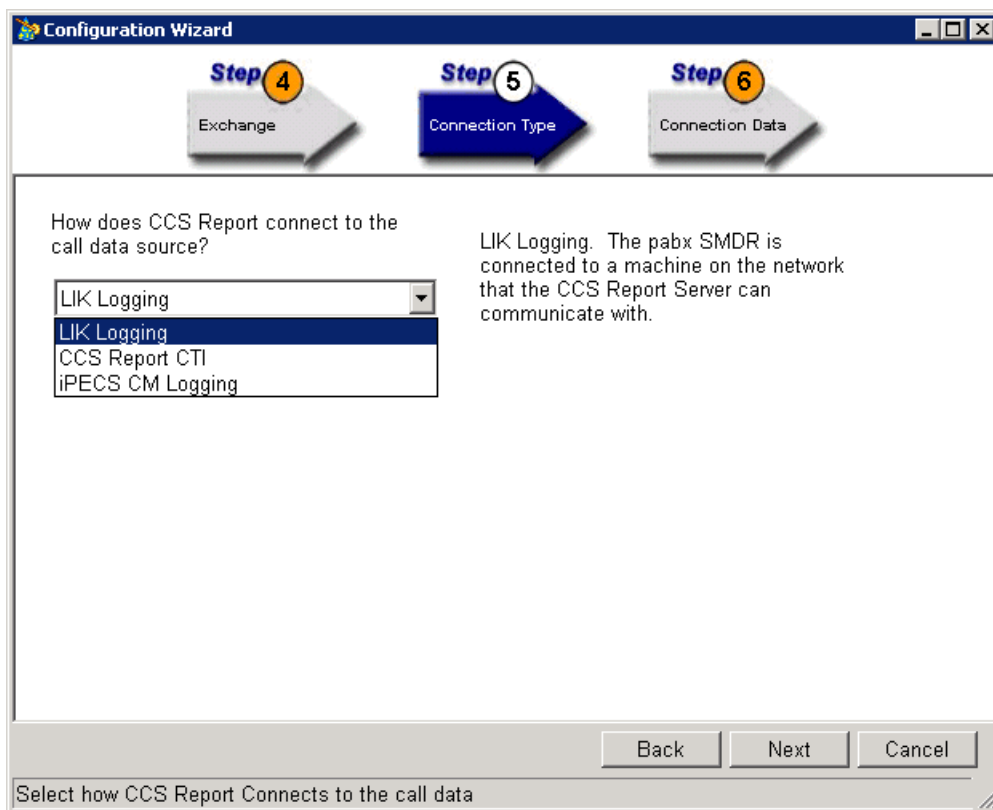
Step 15.4 – Enter the location (**Exchange**) details for this site → Click **Next**.



Local Number or Exchange Name – choose the exchange for the site from the drop down list. Alternatively the site’s phone number can be entered and click the ‘Select’ button to find the matching exchange.

Selected Exchange – shows the result of the Local Number search.

Step 15.5 - Select the **Connection Type** → Click **Next**.



There are 3 connection types that can be selected:

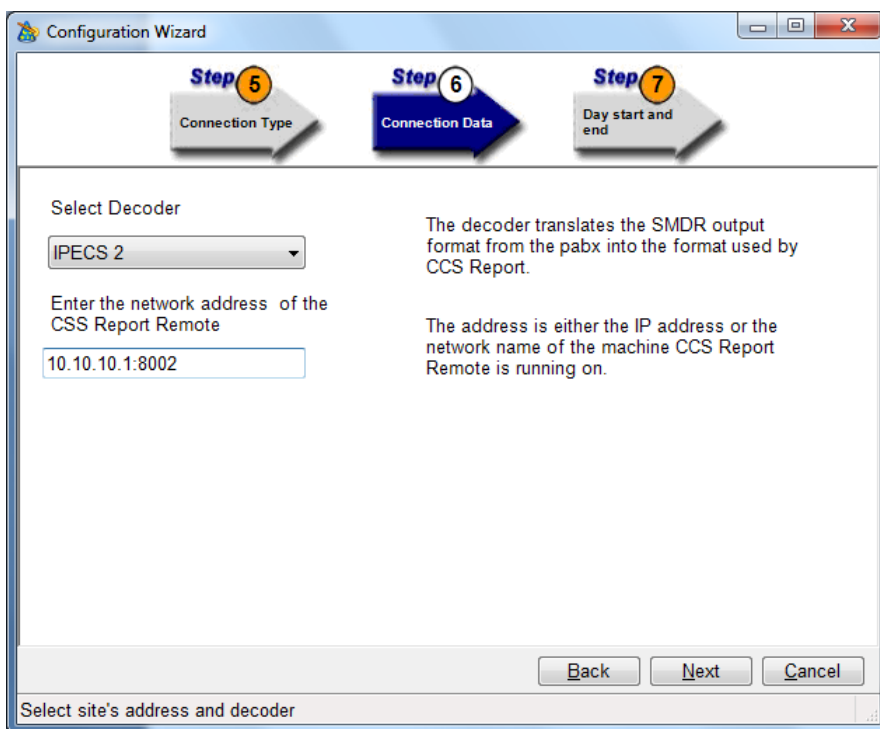
LIK Logging – connects to the iPECS LIK via TCP/IP connection. This requires the network address of the iPECS LIK plus port number.

CCS Report CTI – connects to CTI server i.e. CCS Desk. This requires the network address of the CCS Desk Server.

iPECS CM Logging – A special mode for connection to the iPECS CM. This requires the network address of the iPECS CM as well as the port that it listens to.

→ Select **CCS Report CTI**.

Step 15.6 – select the **Decoder** and enter the iPECS LIK **IP address** → Click **Next**.



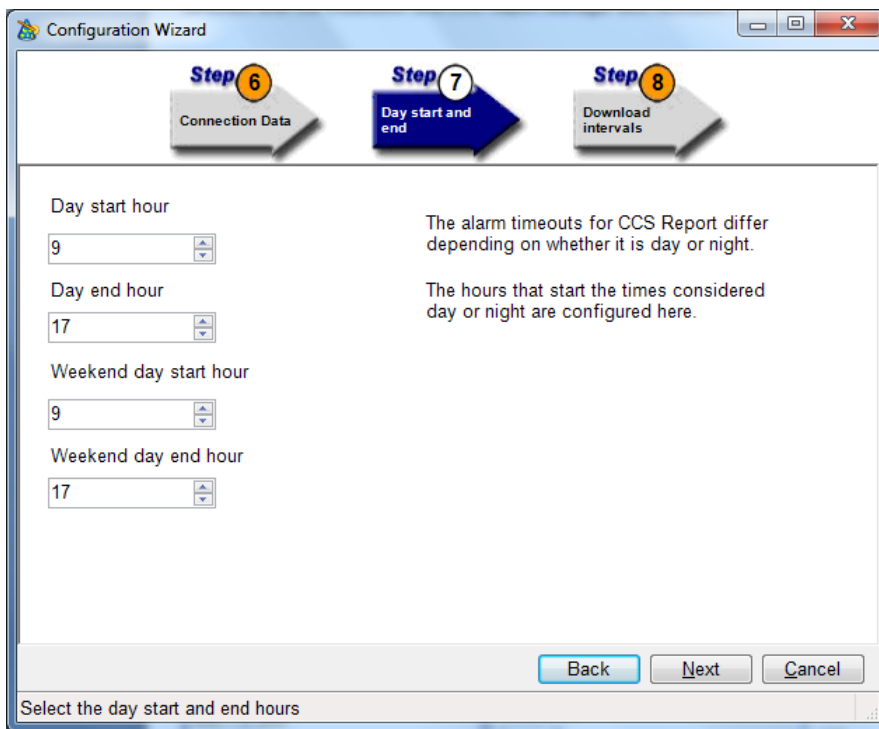
A decoder must be selected to match the PABX make and model. The network address of the call data source must be entered in the edit box using the IP Address and port number, separated by a colon symbol.

For example:

IP Address = 192.168.0.1 and Port number = 9240

→ 192.168.0.1:9240

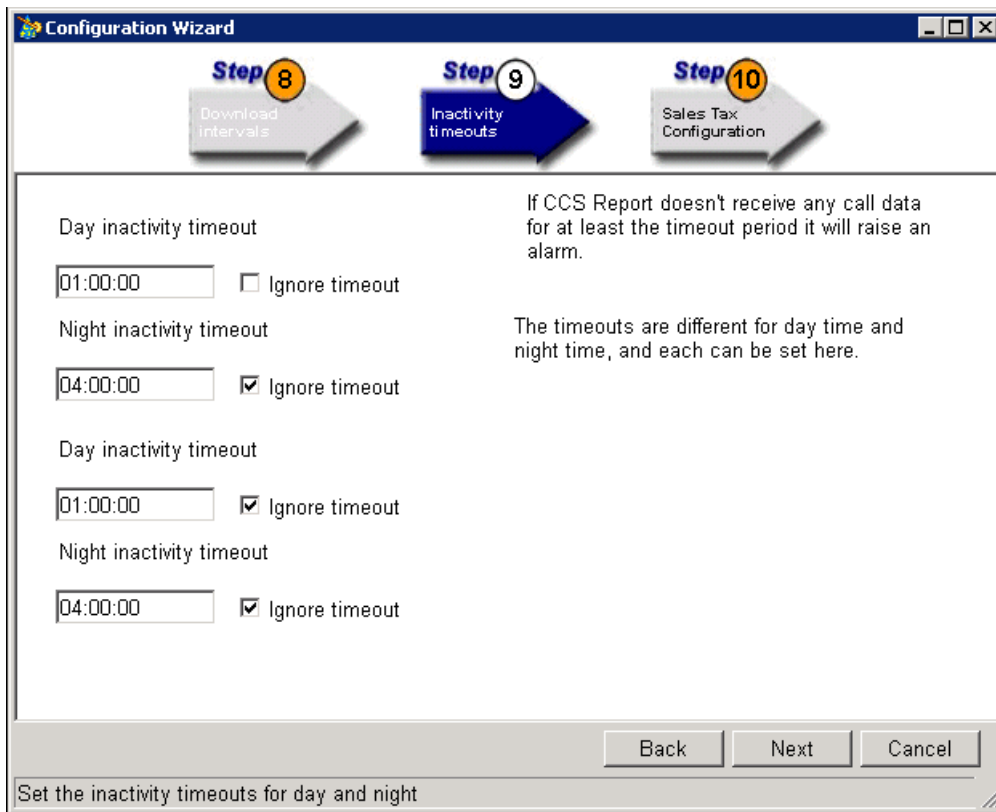
Step 15.7 - **Day start and end** allows you to configure the start and end of business during normal days and weekends → Click **Next**.



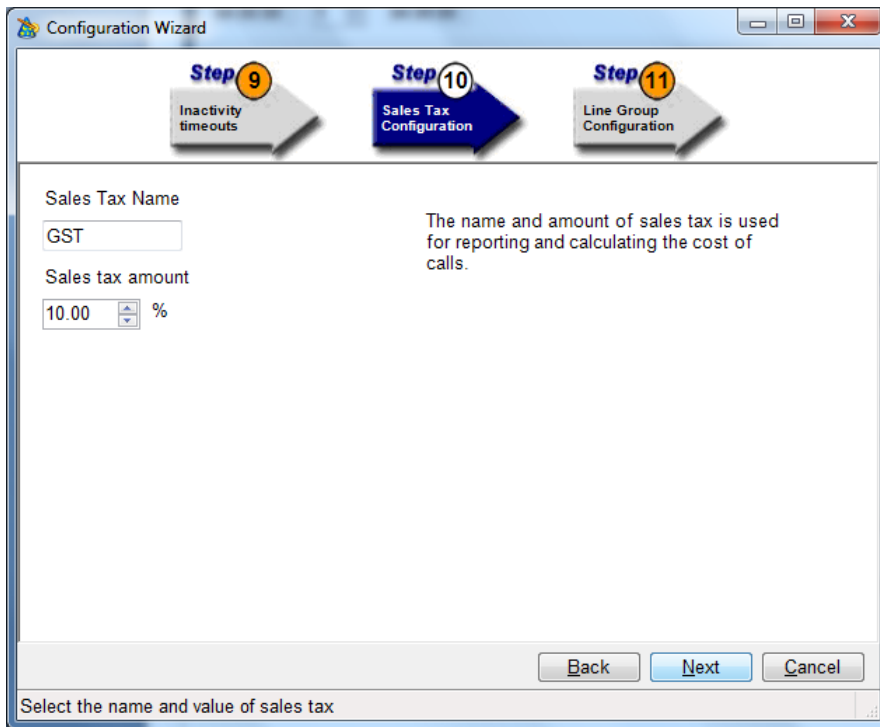
Note

Step 15.8 will automatically be skipped because we using CCS Report CTI mode.

Step 15.9 - Configure the **inactivity timeouts** for each time zone. Only the number of downloads before inactivity can be changed. Timeouts can also be ignored for certain time zones → Click **Next**.



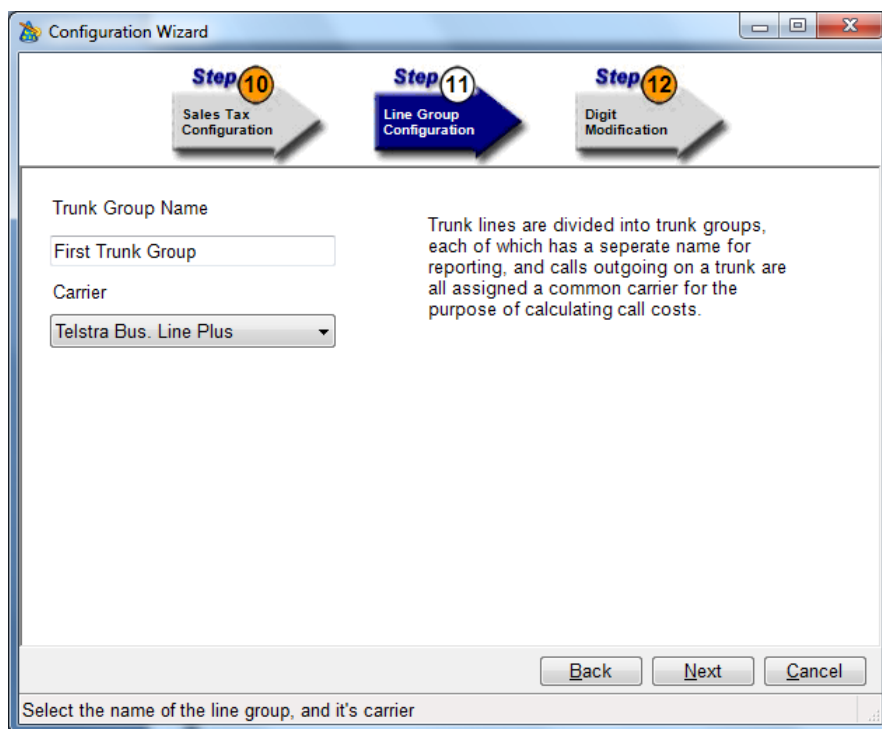
Step 15.10 - Enter a **Sales Tax Name and Rate** → Click **Next**.



Step 15.11 - Create the first **trunk group** for the site by providing a name and selecting a carrier. The list of carrier is determined by the country selected earlier → Click **Next**

Note

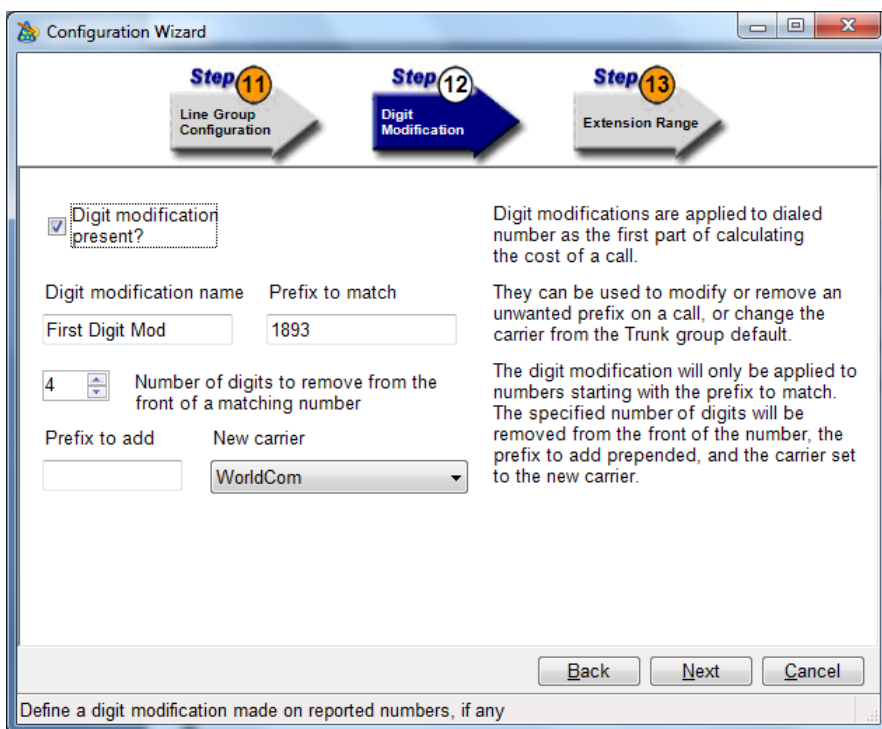
More trunk groups can be created with CCS Report Manager



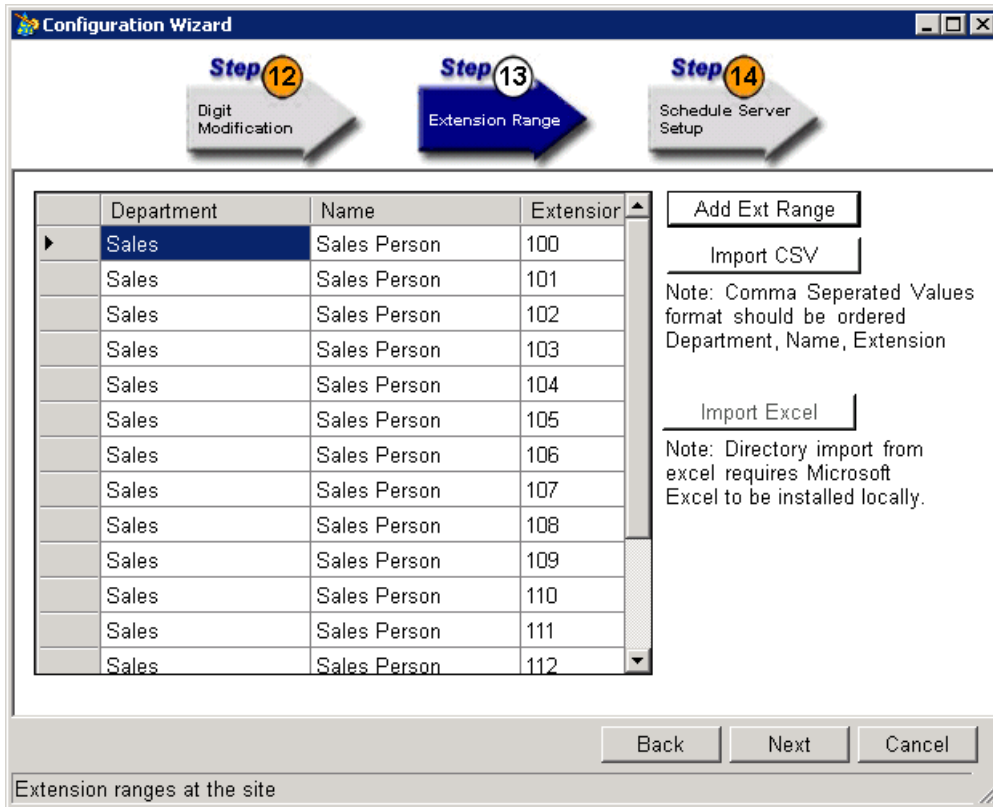
Step 15.12 - Create one **digit modification** settings for the trunk group, if applicable → Click **Next**.

Note

More digit modifications can be created with CCS Report Manager.

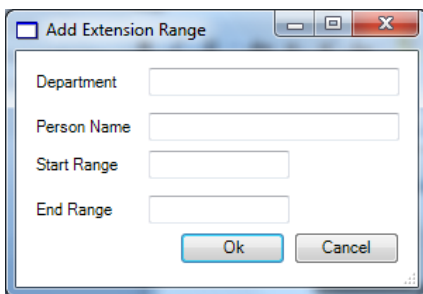


Step 15.13 - Add the **extensions** to be monitored and reported by CCS Report with this step → Click **Next**.



There are several different methods to create or import your Extension Range:

Use the **Add Ext Range** tool to create range of new devices against a department or name.

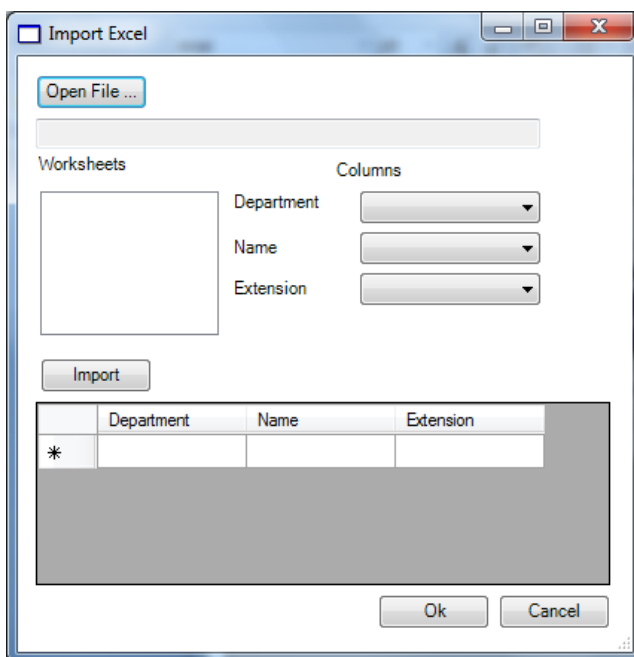


Import CSV – load a CSV file that contains the required information. The CSV file must be formatted correctly as per example below.

*DEPARTMENT, CONTACT, EXT
Support, Taupheeq Omar, 100*

Import Excel - load an Excel spreadsheet that contains the required information. To use this tool, Excel 2007 or later must be installed on the server machine.

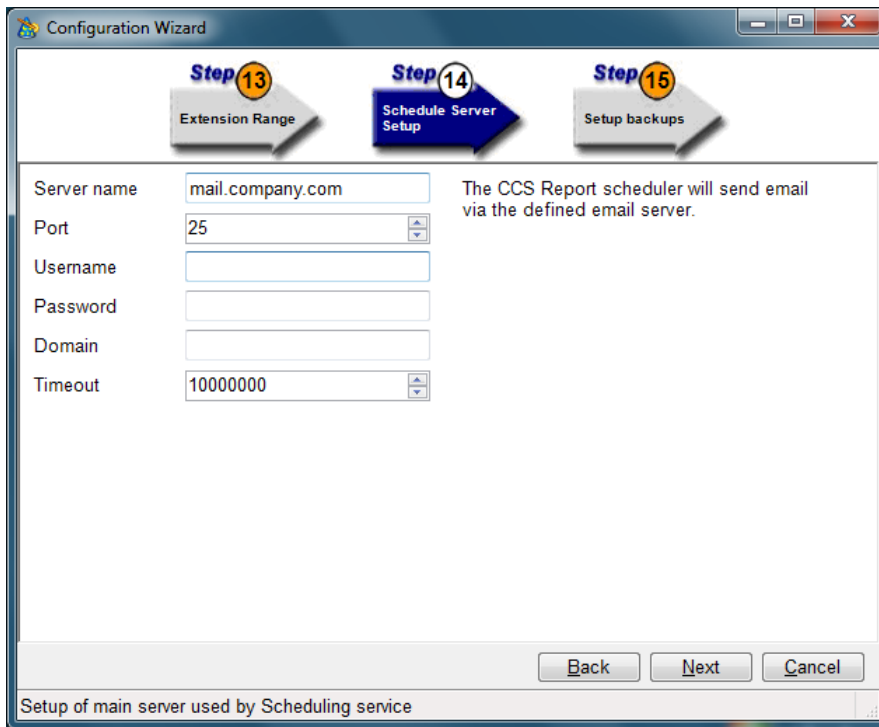
- Select the workbook with the **Open File...** button.
- Select the **worksheets** and **columns** that contain the **Department**, **Name** and **Extension**.
- Click on the **Import** button.
- The imported extension range will be displayed on the cells at the bottom.



Step 15.14 - **Schedule Server Setup** allows you to configure **email** settings for CCS Report Server → Click **Next**.

Note

This must be configured with the same settings as CCS Report Configuration in Step 10.



- Server Name** – the network address of the SMTP email server
- Port** – the SMTP port number
- Username** – the user account for SMTP, if required
- Password** – the password for the user, if required
- Domain** – the domain name for the user, if required
- Timeout** – the number of seconds it waits when attempting to send an email

Step 15.15 - A **database backup** can be scheduled daily by the Configuration Wizard. This is important because the CCS Report database contains all the call data records and system configuration.

Note

This step can be skipped by disabling the 'Schedule Backup' box. Otherwise all information must be completed before it can move to the next step.

→ Click **Next**.



Schedule Backup – enables the feature.

User Name – the Windows user with administrator privilege

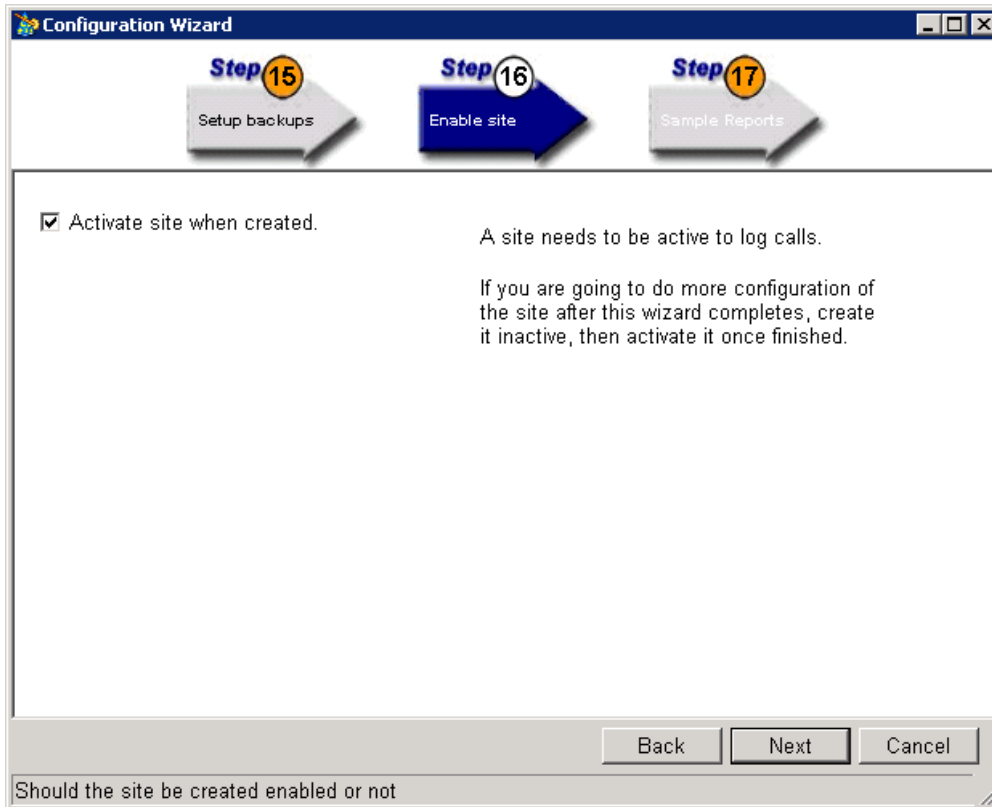
Password – the password to the Windows user.

Test Pass – used to test the username & password.

Backup Location – storage path and name of the backup file

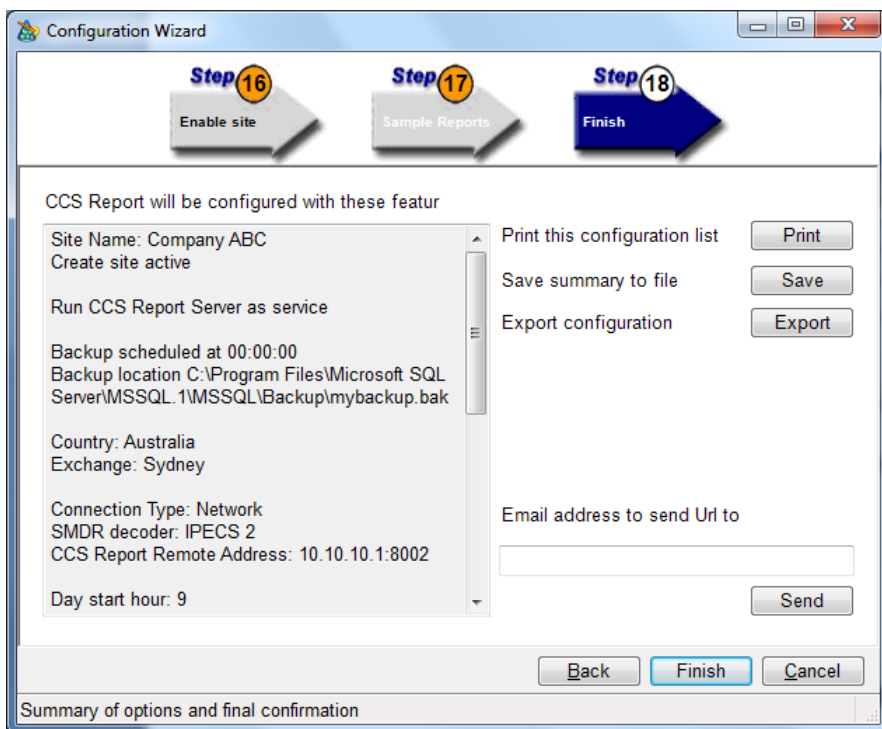
Time to Run Backup – the time when the backup task will be performed daily.

Step 15.16 - Select **Activate site when created** to enable CCS Report Server to start collecting call data records for this site → Click **Next**.



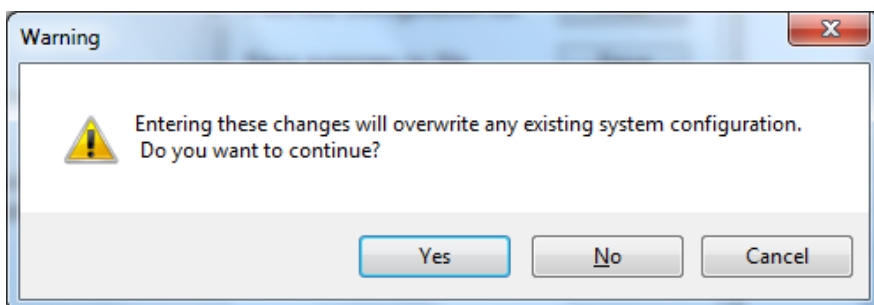
Step 15.17 - The wizard will jump to Step 18 which provides a **Summary** of all the settings used. The summary of the configurations can be **printed** and **saved as a text file**.

The configuration can also be **exported** so that it can be loaded into the configuration wizard. Please consult Step 14.1 for more information.



→ Click **Finish** to write the configuration into the database.

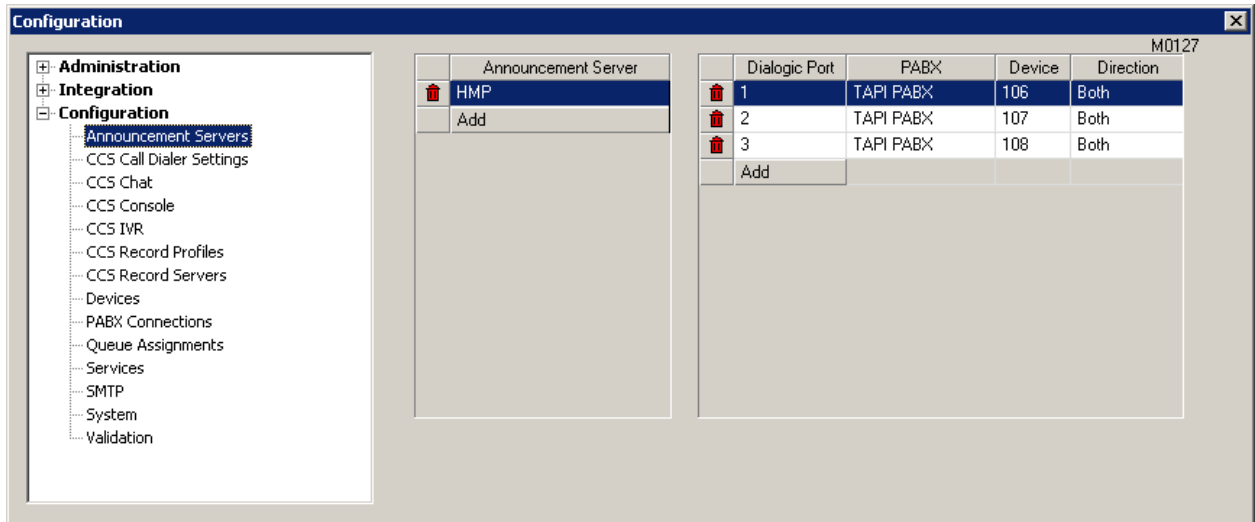
→ Click **Yes** on the warning. Any existing configuration will be overwritten and is not recoverable.



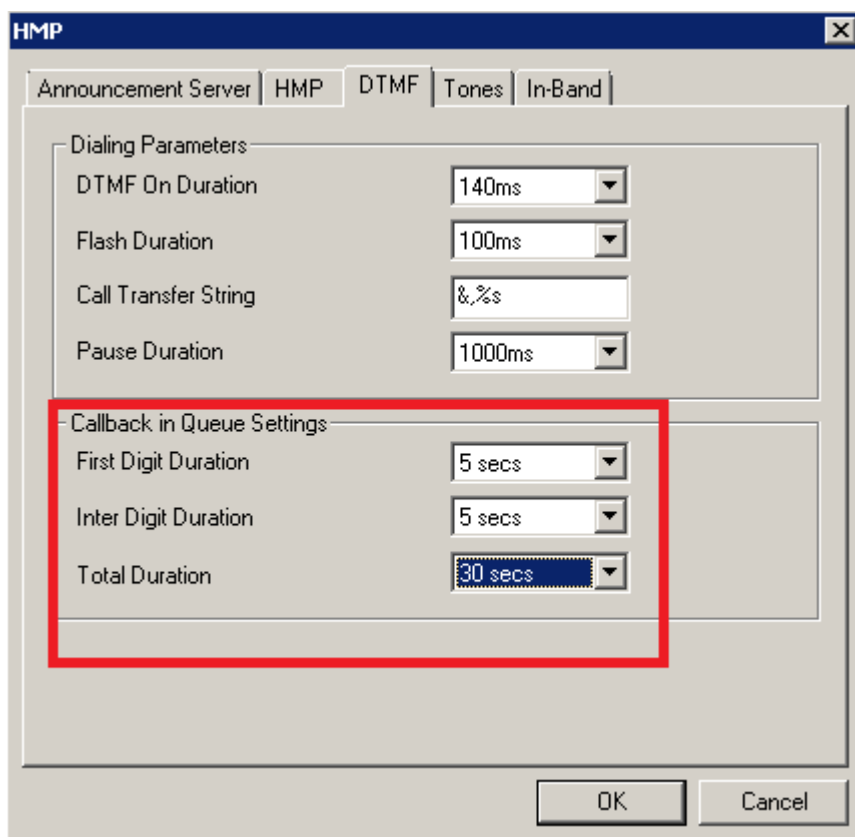
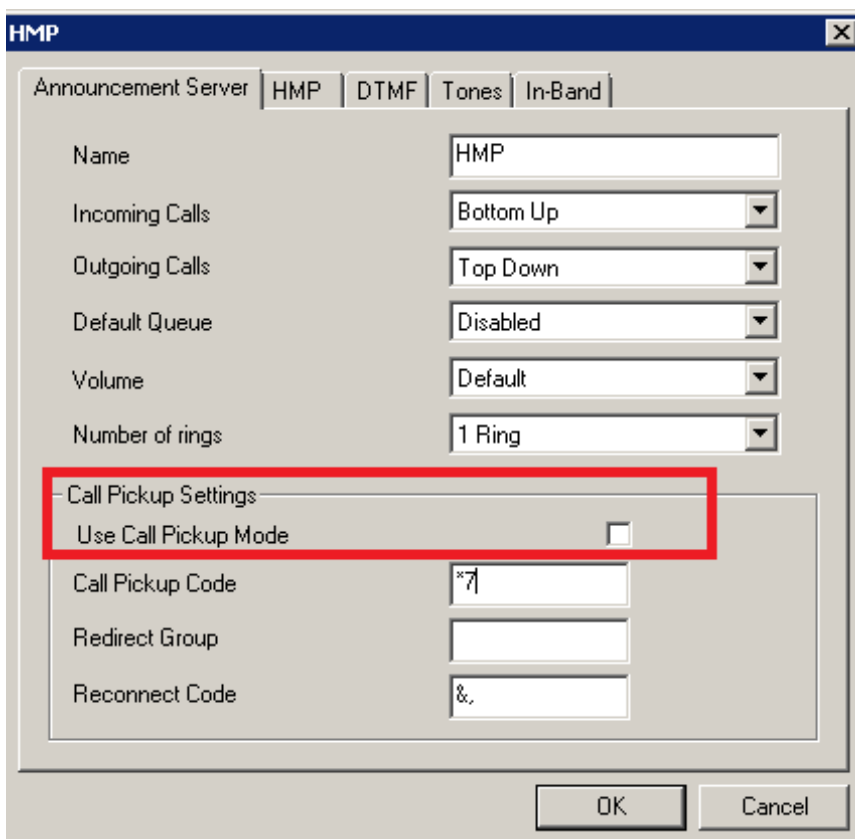
Step 16 - Open CCS Desk Manager → Select **Options** → Select **Configure** → Login to **CCS Desk Manager Configuration**

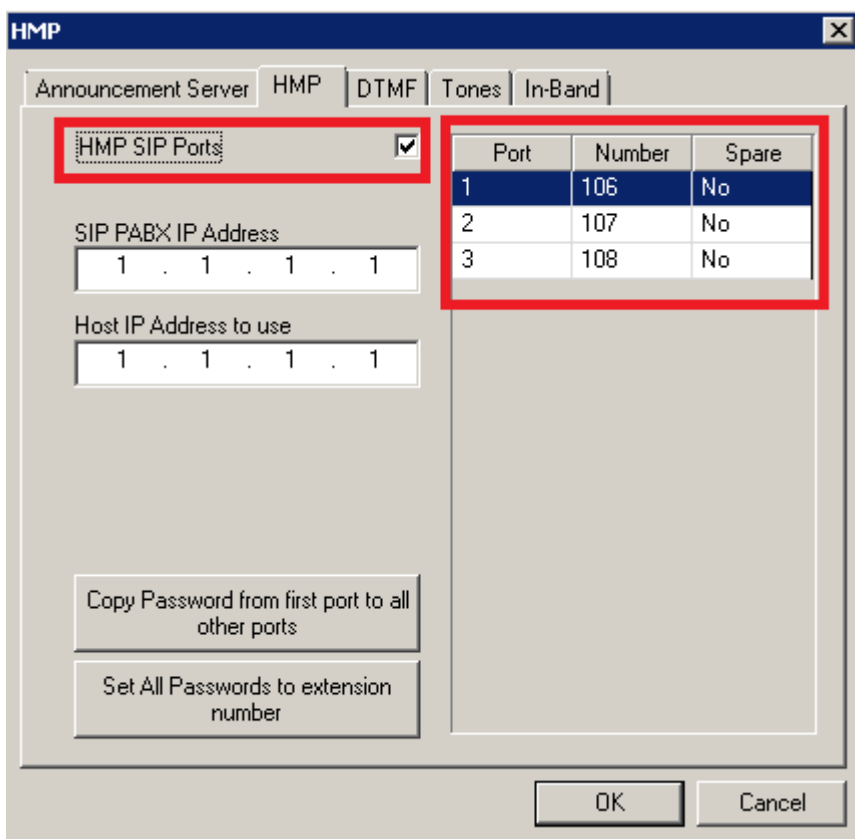
Step 17 - Go into the **Announcement Servers** tab → Create an **Announcement Server** profile to integrate Dialogic HMP with the PBX.

Please consult Section 6.3.1 for detailed information on each setting.



Step 18 - **Double Click** the relevant Announcement Server to view the **Announcement Server Configuration** window as shown below.





The important settings are highlighted:

a) **Call Pickup Mode Parameters**

- i. **Use Call Pickup Mode** must remain **disabled**

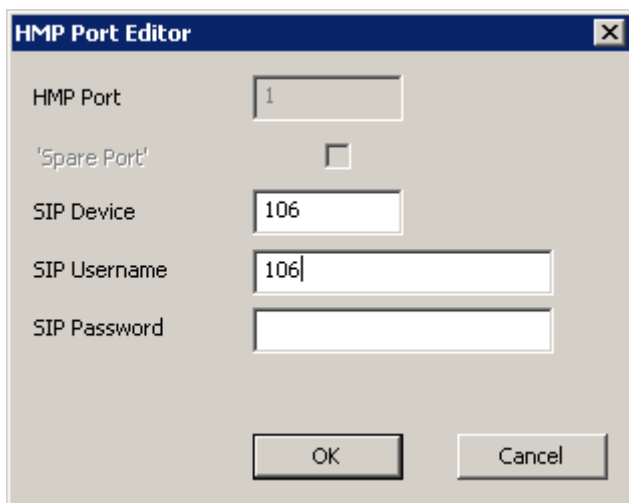
b) **Callback in Queue Settings**

- i. This set of options must be configured if CCS Q Callback-In-Queue is to be used. The recommended settings are as shown.

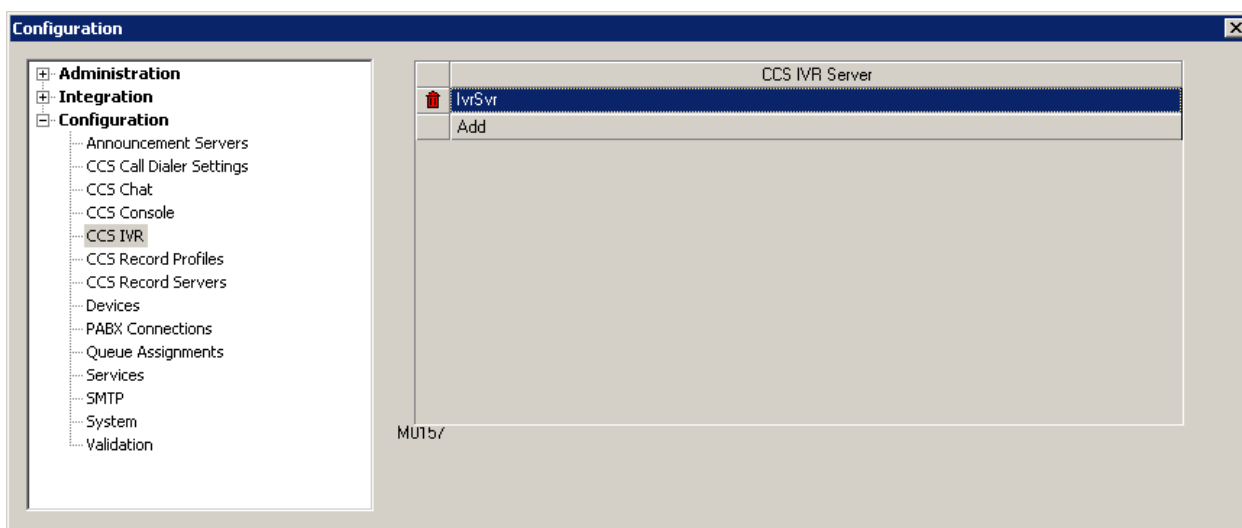
c) **HMP**

- i. **HMP SIP Ports** must be **enabled**
- ii. **Requires Spare Channel** must remain **disabled**

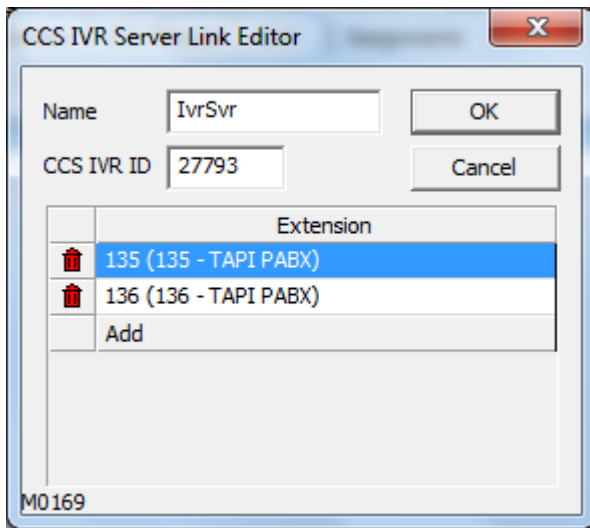
Double click on each port and configure the SIP registration settings.



Step 19 - Go to the **CCS IVR** tab → Click **Add** button to create a new CCS IVR integration profile.



Step 20 - **Double click** on the created profile → **Complete** the configuration.

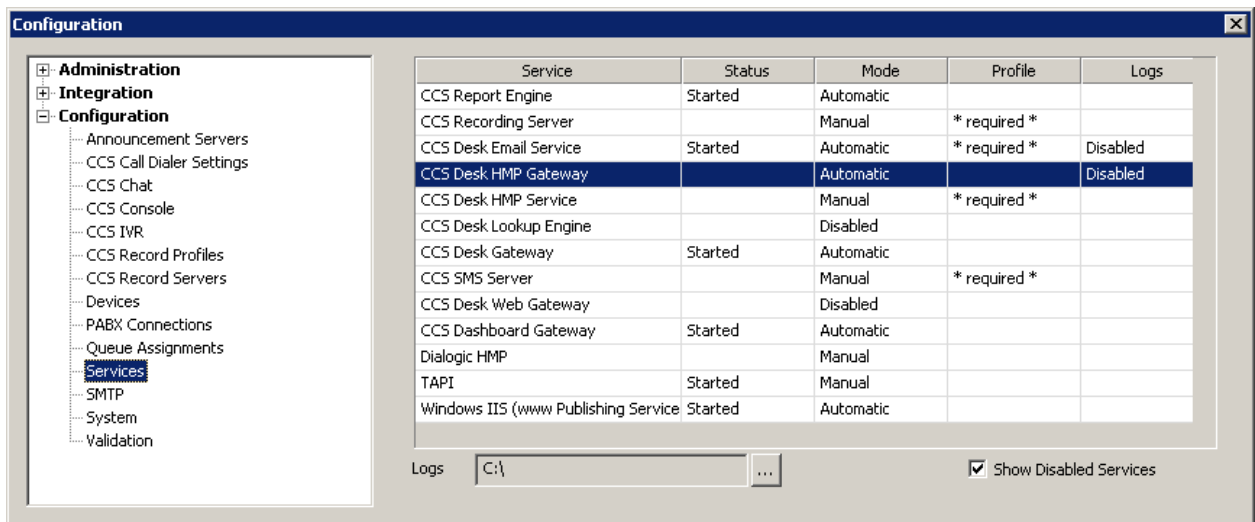


Name – The name of the profile.

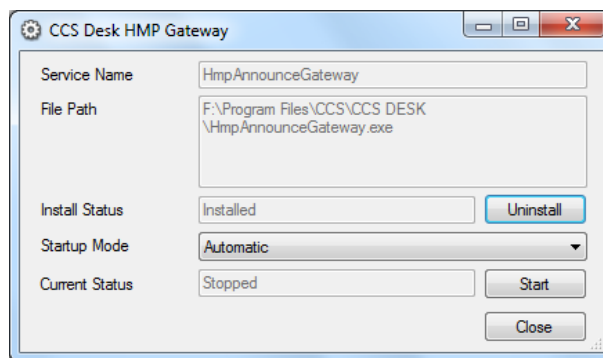
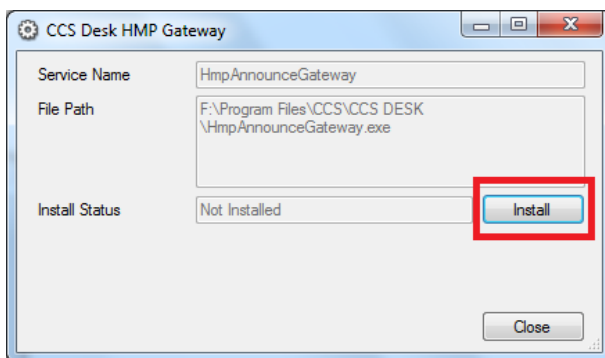
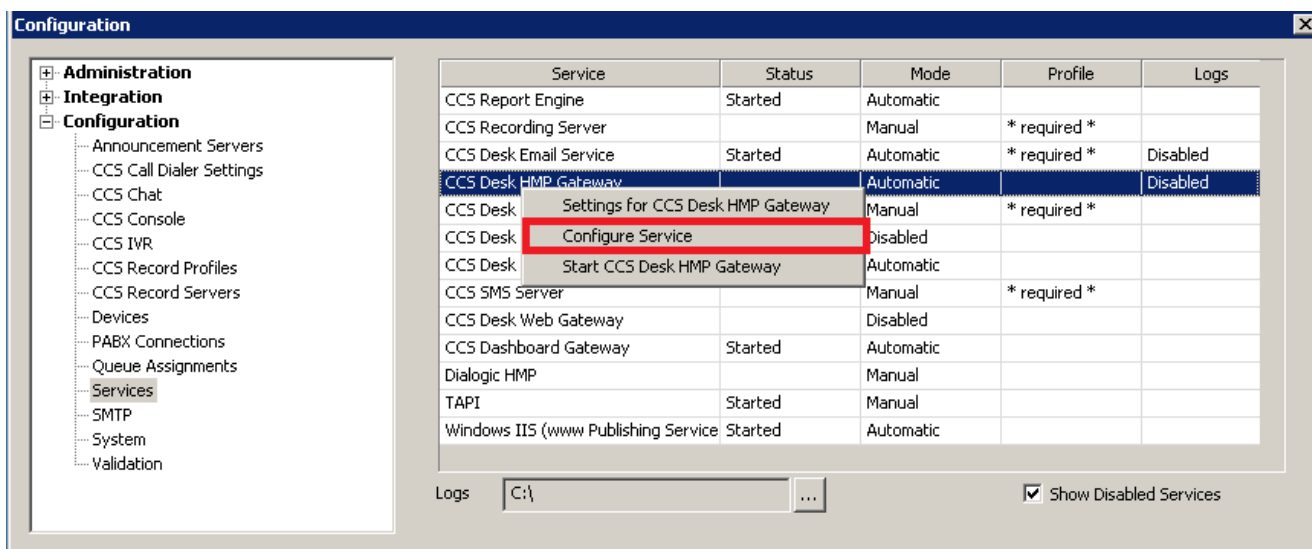
CCS IVR ID – The license number of CCS IVR. This ensures that the correct messages go to the correct CCS IVR.

Extension – The list of SIP devices connected to CCS IVR.

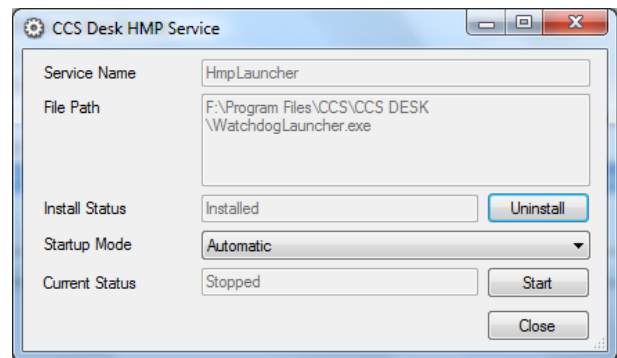
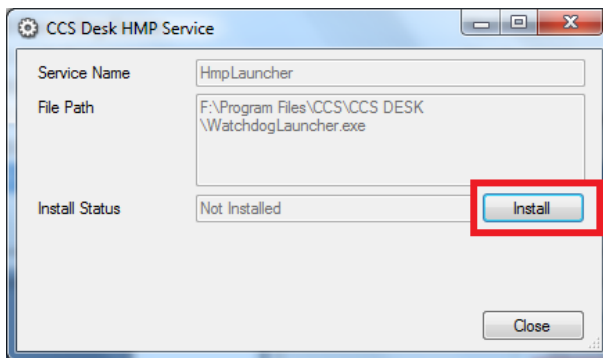
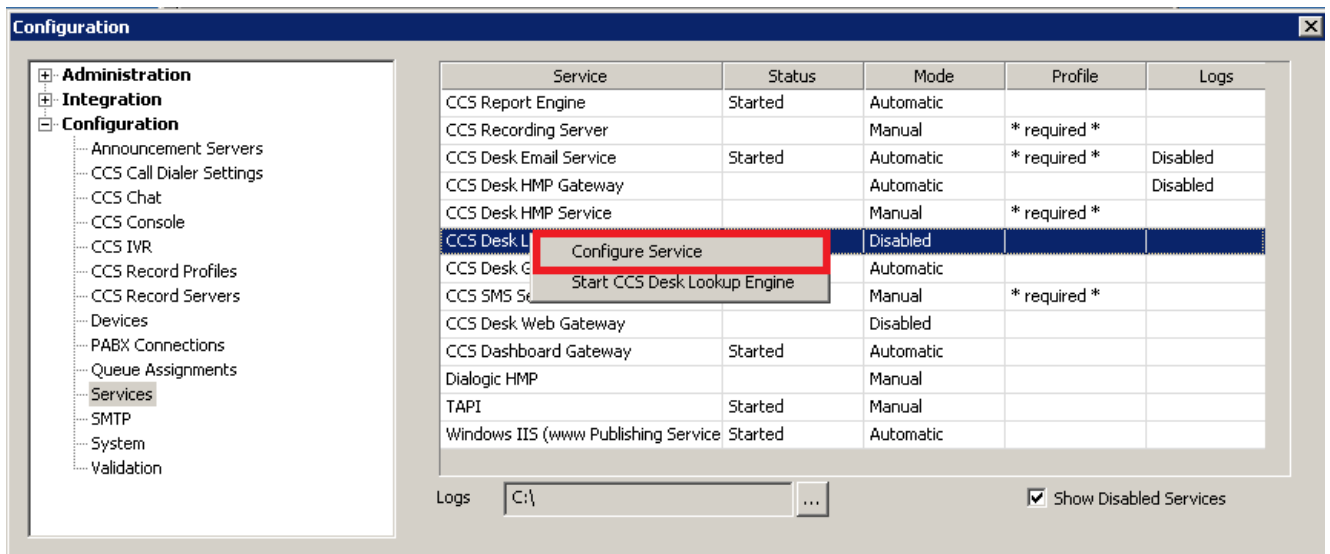
Step 21 - Go to the **Services** tab → the click on **Show Disabled Services**.



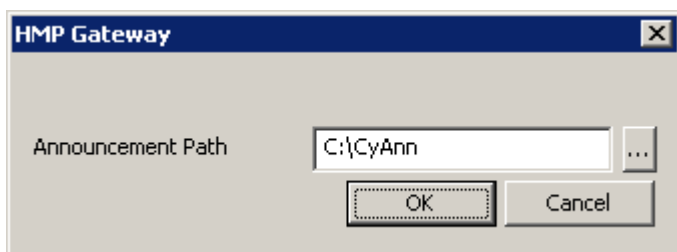
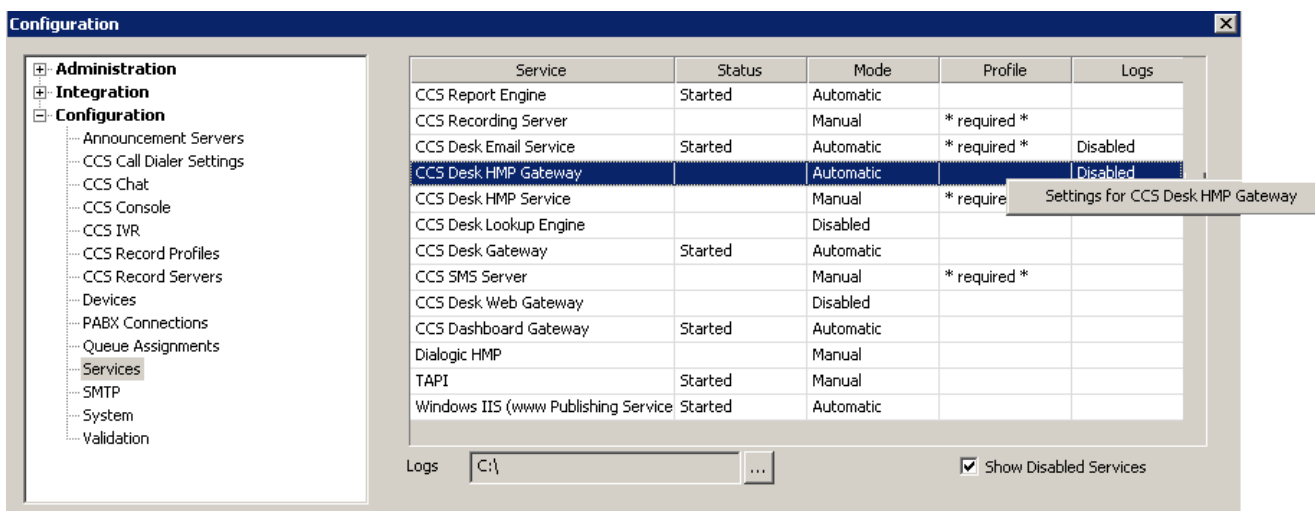
Step 22 - Right click on **CCS Desk HMP Gateway** → Select **Configure Service** → Select **Install** → Check the **Startup Mode** is set to **Automatic**. Do not start the service.



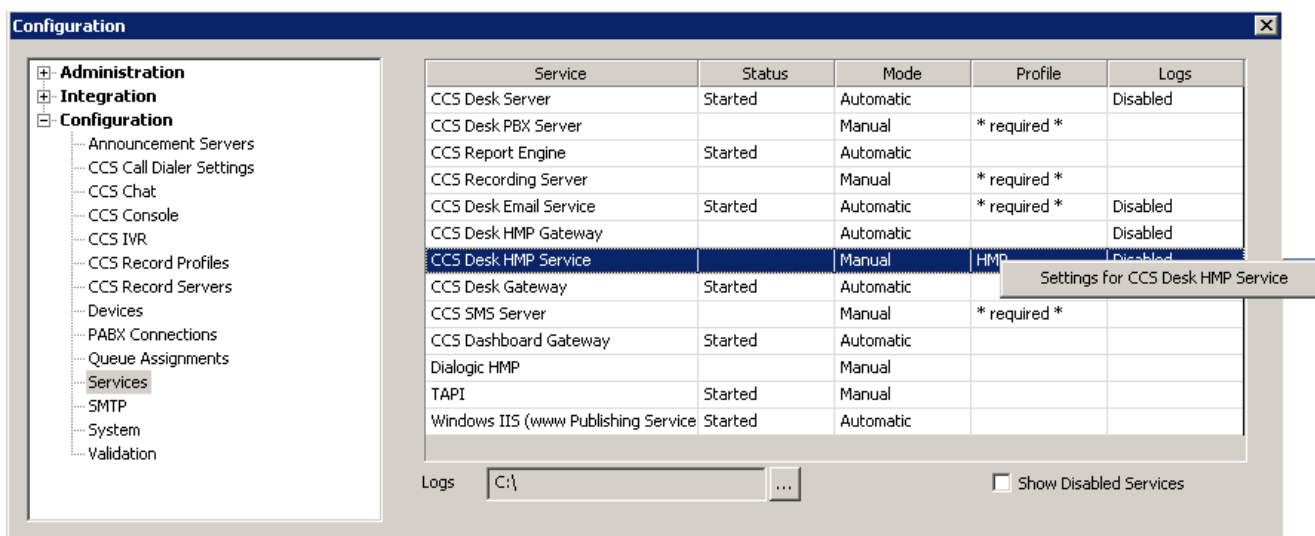
Step 23 - Right click on **CCS Desk HMP Service** → Select **Configure CCS Desk HMP Service** → Select **Install** → Check the **Startup Mode** is Automatic. Do not start the service.



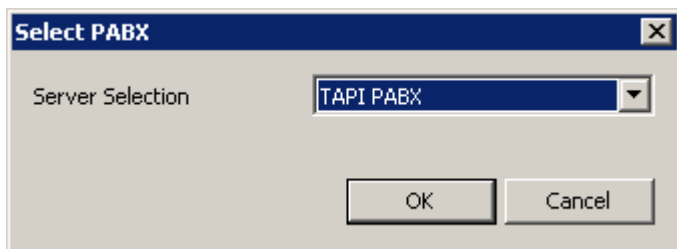
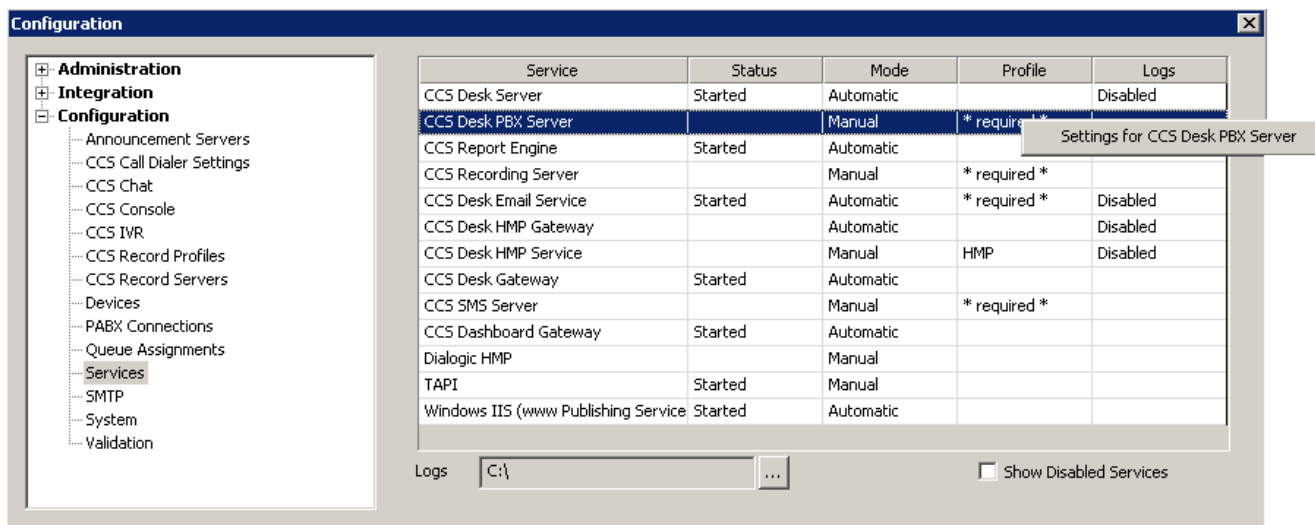
Step 24 – Right click on the Profile for **CCS Desk HMP Gateway** → Select **Settings for CCS Desk HMP Gateway**. Then select the **Announcement Path** and click **OK**



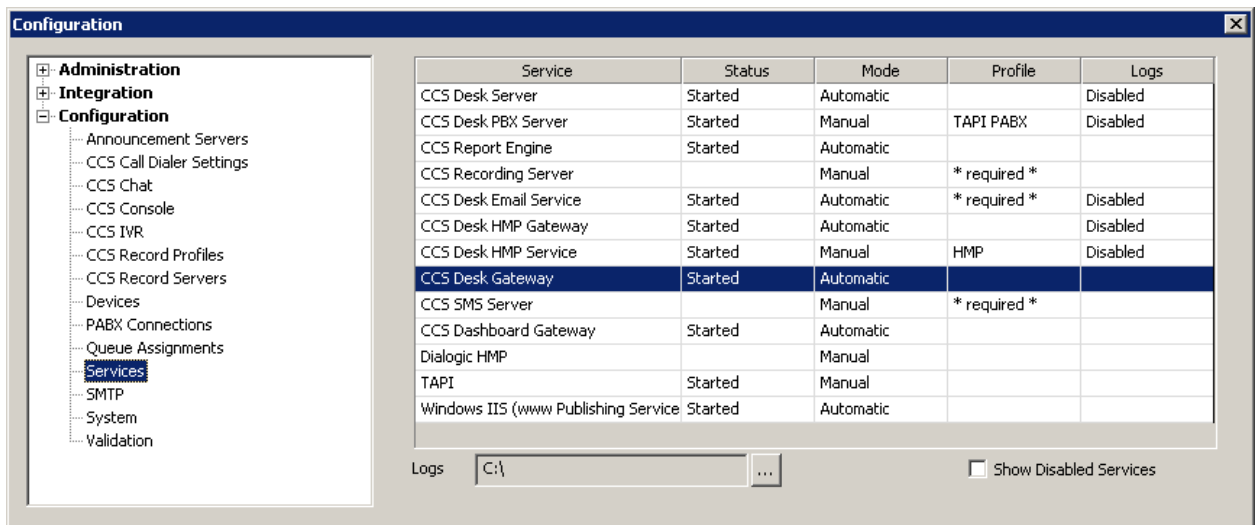
Step 25 - Right click on the Profile for **CCS Desk HMP Service** → Select **Settings for CCS Desk HMP Service**. Then select the Server and click **OK**.



Step 26 - Right click on the Profile for **CCS Desk PBX Server** → Select **Settings for CCS Desk PBX Service**. Then select the Server and click **OK**.



Step 27 – Start the services. **Start CCS Desk PBX Server**, followed by **Start CCS Desk HMP Gateway** and **Start CCS Desk HMP Service**.

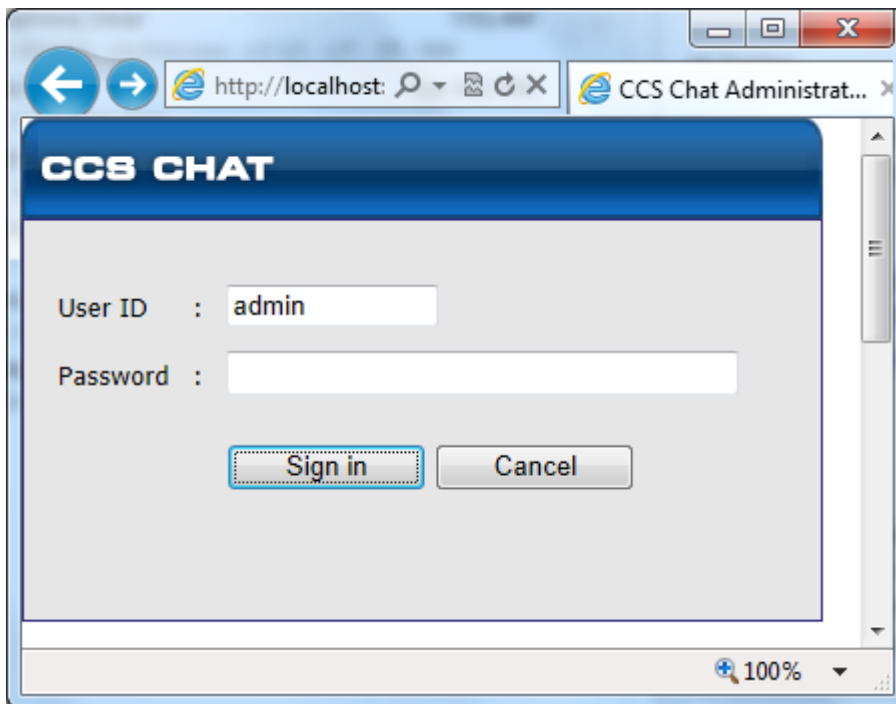


Step 28 - We now need to make several configurations with the **CCS Chat Admin page**.

The admin page can be accessed from the CCS Chat server by opening the address below with a web browser: **http://localhost/CCSChat/AdminPage**

User ID is admin

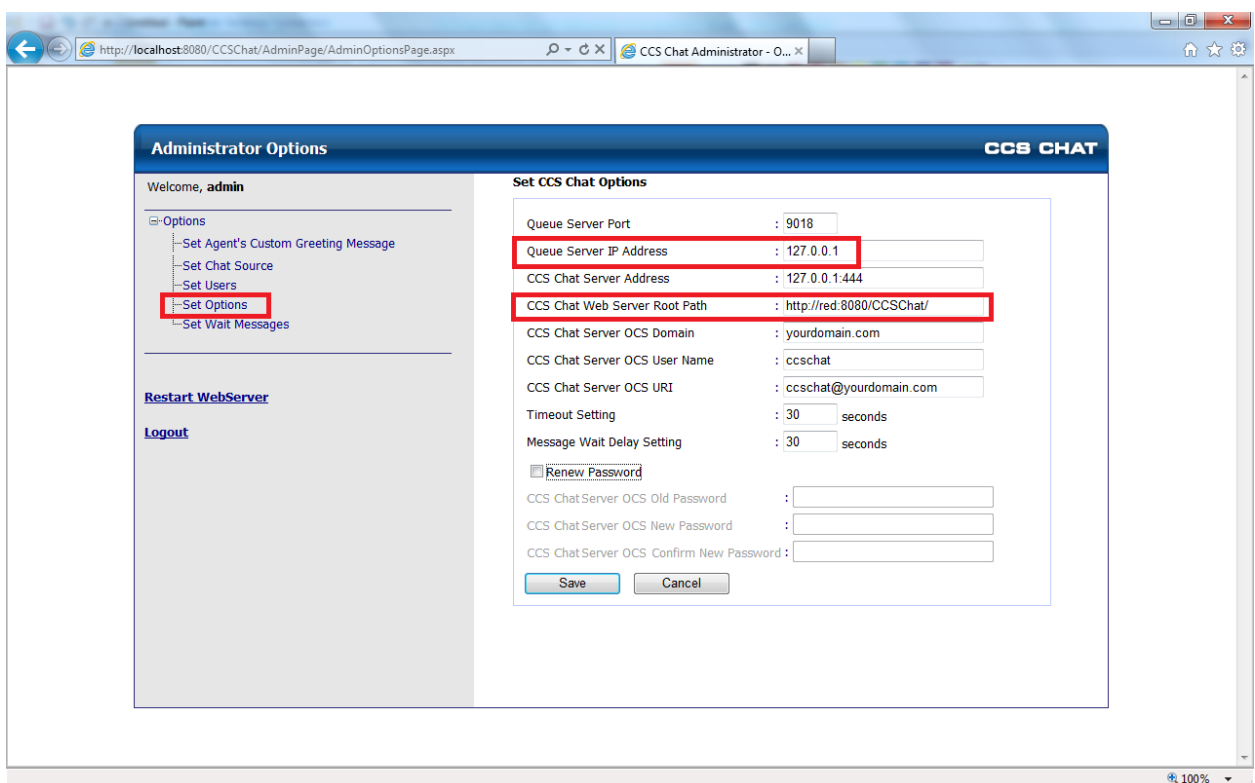
Password is blank by default.



Step 29 - Click **Set Options** and ensure the following configurations are correct:

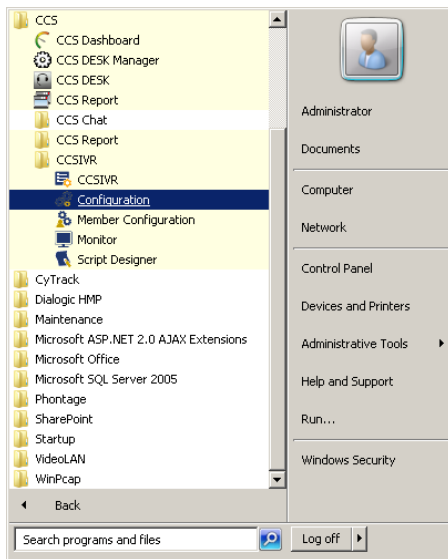
- **Queue Server IP address:** the IP address of the CCS Desk server. 127.0.0.1 can be used if CCS Desk is running on the same machine.
- **CCS Chat Web Server Root Path:** this must be changed to the proper URL with the correct web server name or IP address. For example: **http://red/CCSChat/**.

Port configuration might be required when the web administrator has manually modified the CCS Chat website binding configuration in IIS. The screenshot below shows the required configuration when the CCS Chat website is bound to port 8080.



→ Once all settings are configured, click **Save** → Click **OK** to restart the web server.

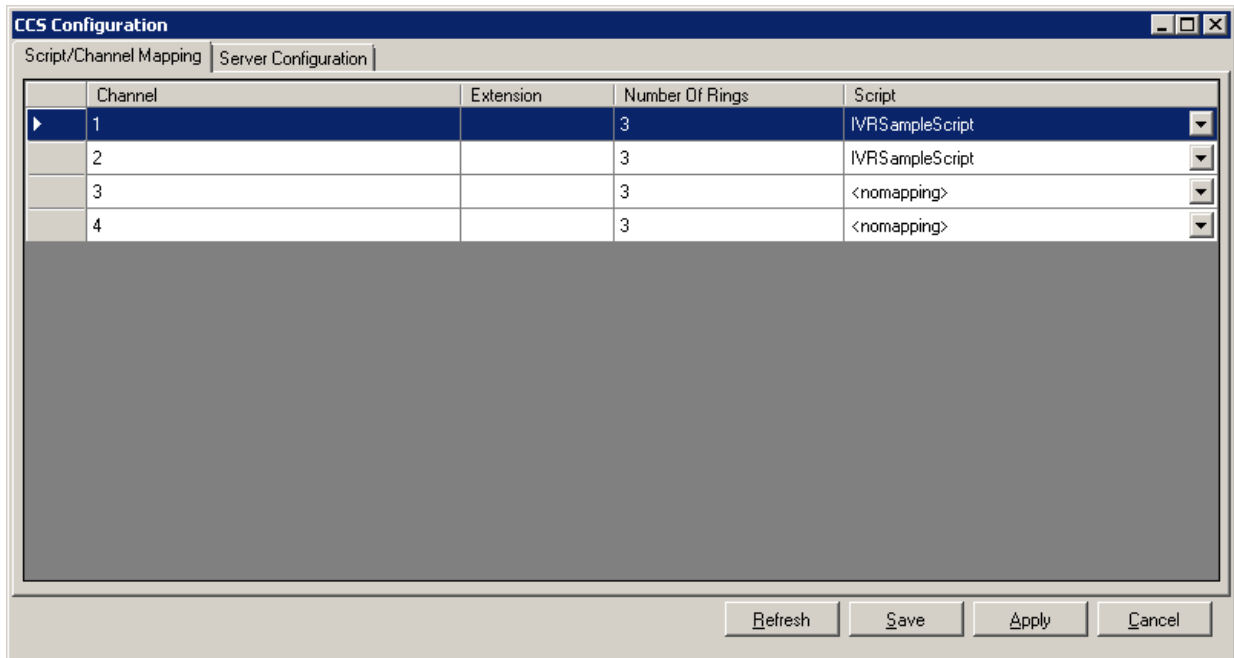
Step 30 - Run the IVR Configuration from **Start** → **All Programs** → **CCS** → **CCS IVR** → **Configuration**.



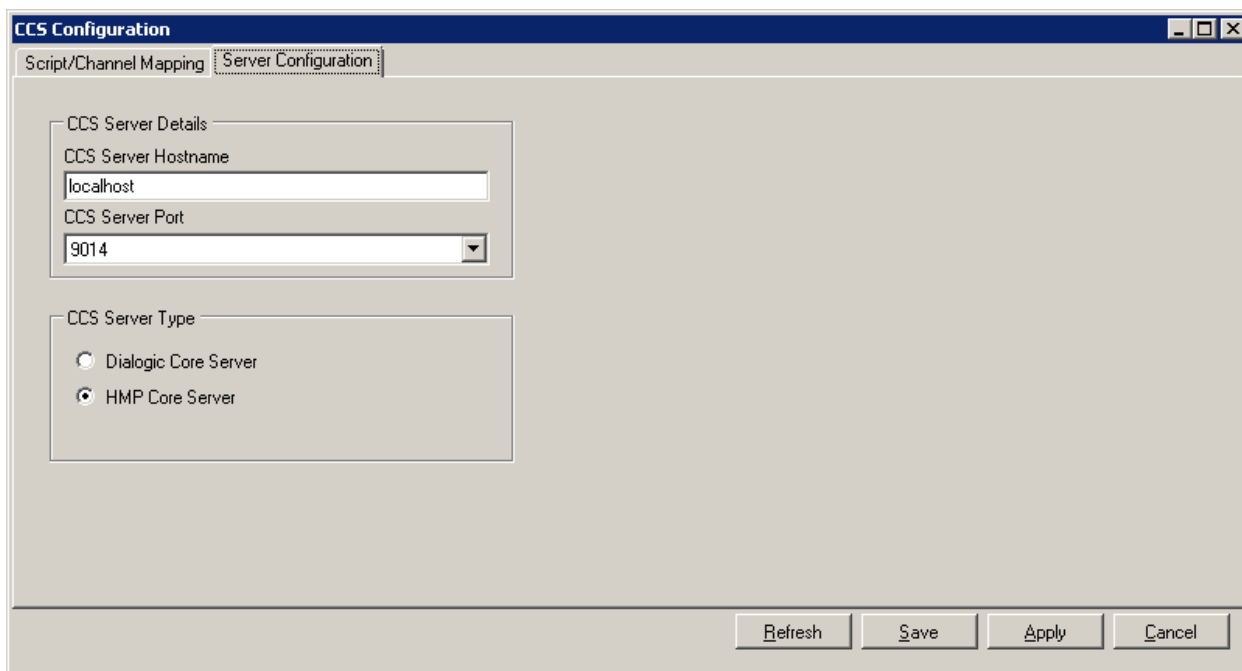
Step 31 - There are 2 tabs in CCS IVR Configuration that needs to be configured

Script/Channel Mapping

Script to channel mapping defines which script will run on which Dialogic HMP channel installed on the CCS IVR Server. The correct analog / SIP extension number connected with the ports must also be configured here.



Server Configuration



CCS Server Hostname & Port - the setting for CCS IVR to connect with the CCS Desk Server. Port can be configured to either 9014 or 9011. It is recommended to set the port as **9014**.

CCS Server Type - select **HMP Core Server** when using Dialogic HMP. Dialogic Core Server is used when CCS IVR is using the Dialogic Analogue board.

→ Click **Save** when finished.

-END OF CCS FULL INSTALL-

Note

In order to install the additional components listed below - please refer to the individual chapters or user manuals on the respective products. They do not require the CCS Installer to be run but some configuration is required:

CCS Q

CCS Call

CCS Record

2. IPECS CCS DESK INSTALL

2.1 Pre-Installation Requirements

The requirements for CCS Desk are divided into two parts:

1.1.1 System Requirements

1.1.2 TAPI Requirements

2.1.1 System Requirements

The **Server and the Client workstations** must meet the following minimum specifications.

CCS Desk Server Recommended Hardware			
Install Scope	Up to 30 CCS Agents with 300 Calls Maximum Per Day	Up to 50 CCS Agents with 1000 Calls Maximum Per Day	More than 50 CCS Agents with more than 1000 Calls Per Day
Dedicated Server Required	Yes	Yes	Yes
Dedicated SQL Server Required	No	Yes	Yes
Virtual Server Possible	Yes	Yes	Yes
Operating System	Windows 7 Professional or Windows Server 2008 R2	Windows 7 Professional or Windows Server 2008 R2	Windows Server 2008 R2
CPU	I3 2120 3.3GHz	I3 2120 3.3GHz	I3 2120 3.3GHz
RAM	4 GB	6 GB	8 GB
Hard Drive Space	40 GB	100 GB	200 GB
Additional Requirements:	PBX TAPI driver must be installed. Caller ID must be enabled on the trunk lines		

CCS Desk Client Recommended Hardware		
Install Scope	Client	Client and Manager
Operating System	Windows 7 Professional	Windows 7 Professional
CPU	I3 2120 3.3GHz	I3 2120 3.3GHz
RAM	1 GB	2 GB
Disk Space	10 GB	10 GB

2.1.2 TAPI Requirements

→ Follow the **TSP Installation Guide for CCS** document.

The TSP driver is used by TAPI to allow the communication between the server and the PBX.

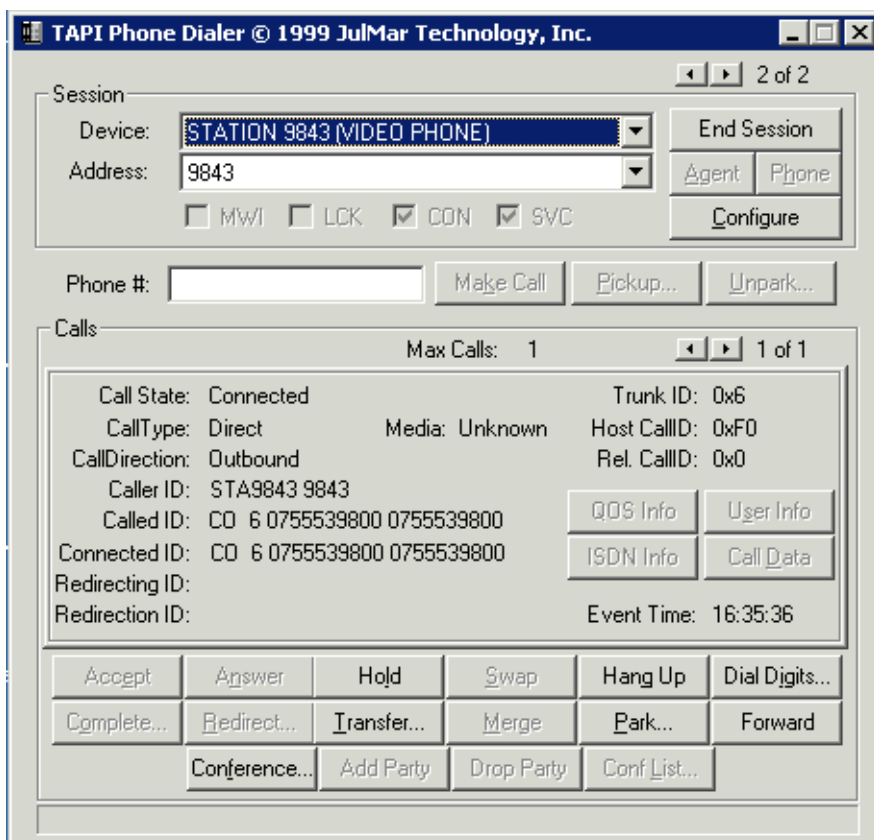
Once the installation is finished, we need to test that the TAPI device is working correctly.

→ There is a free program called **TAPI Soft Phone** that allows you to monitor / control telephony devices through TAPI in a similar fashion to CCS Desk. The application is downloadable from the following link:

http://www.julmar.com/tapi/native-tapi-samples/tapi_soft_phone.zip

→ Run a few **checks** to confirm telephony is working correctly:

- Ensure all TAPI devices are listed.
- Start a session on the nearest extension and ensure control can be achieved.
- Lift handset and view the devices changed status, make a call, hang-up a call etc.



2.2 Installation

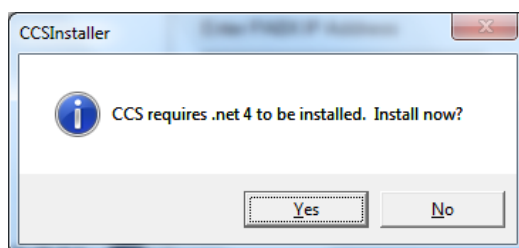
2.2.1 CCS Desk Server

This is for a new install of CCS Desk Server ONLY on a Single Server

Step 1 - Run the **CCSInstaller** application with Administrator privilege.



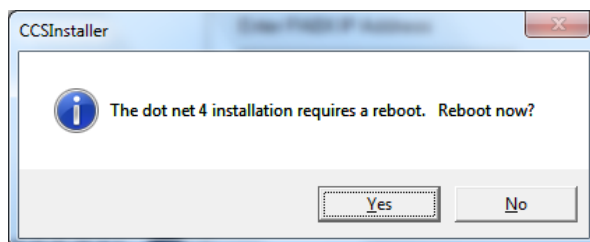
Step 2 - If **Microsoft .NET Framework 4.0** is not already installed, you will receive the message to install it → Select **Yes**.



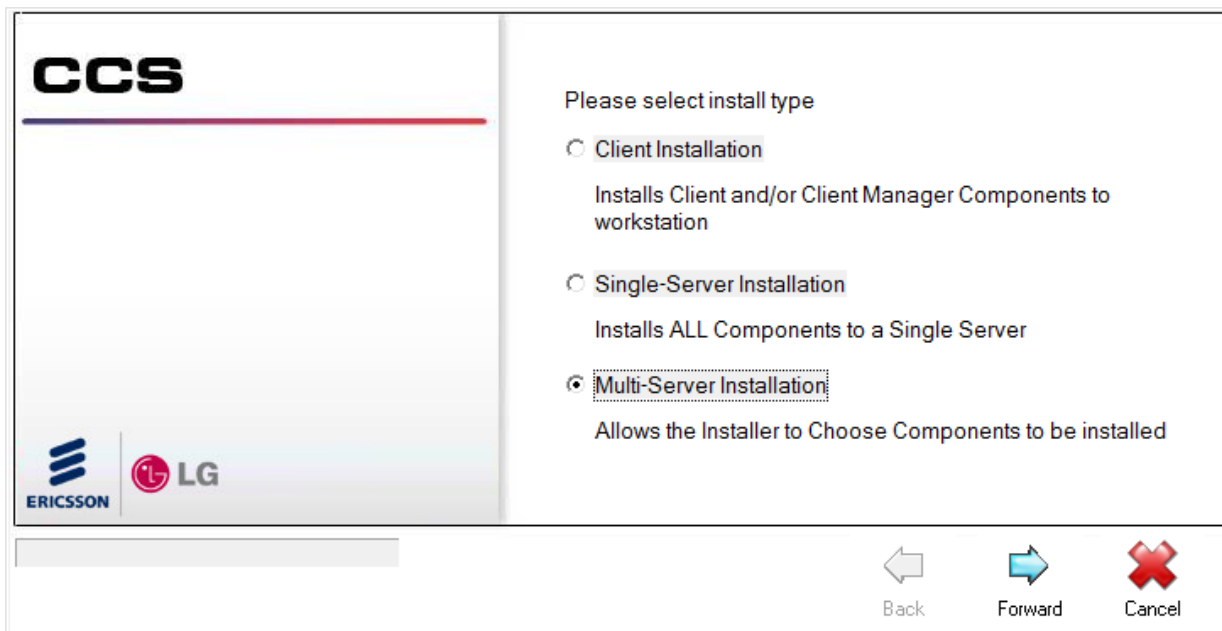
The installation may take a few minutes to complete.

NOTE

You will be prompted to **reboot** your system once the install completes. Please ensure you do the reboot before continuing with the install



Step 3 - Once you log back in the CCS Installation will continue and you will receive the Option to Install the Client or Server → Select **Multi-Server Installation** → Click **Forward**.

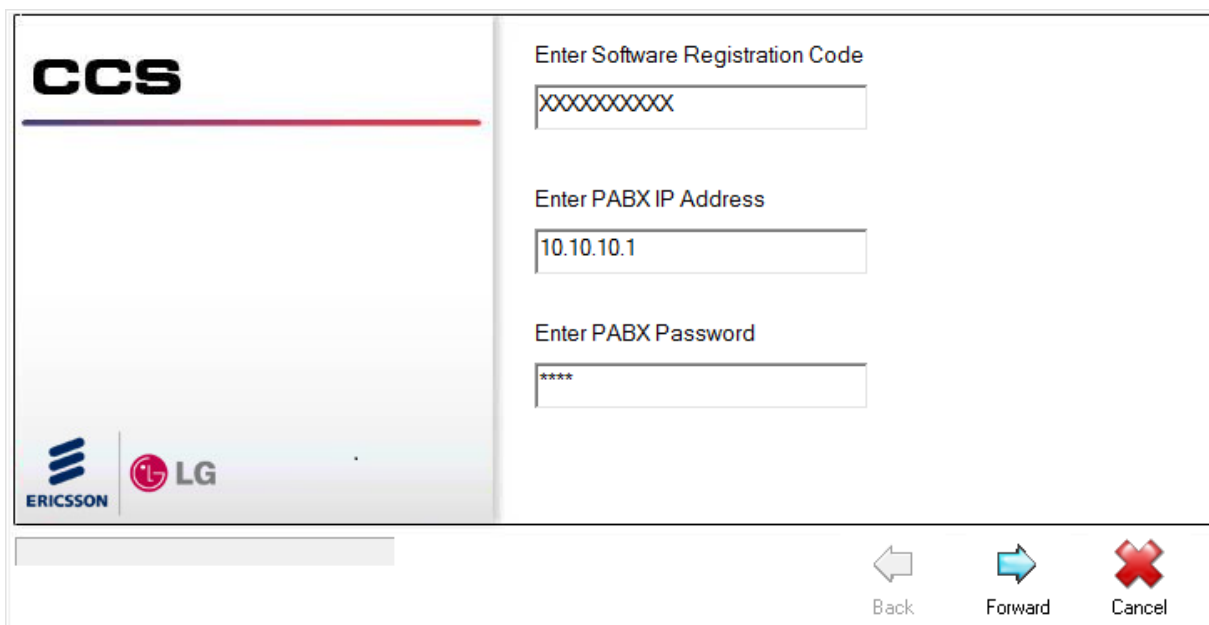


Step 4 - At the next screen you will need to enter your **CCS license code and PABX details**

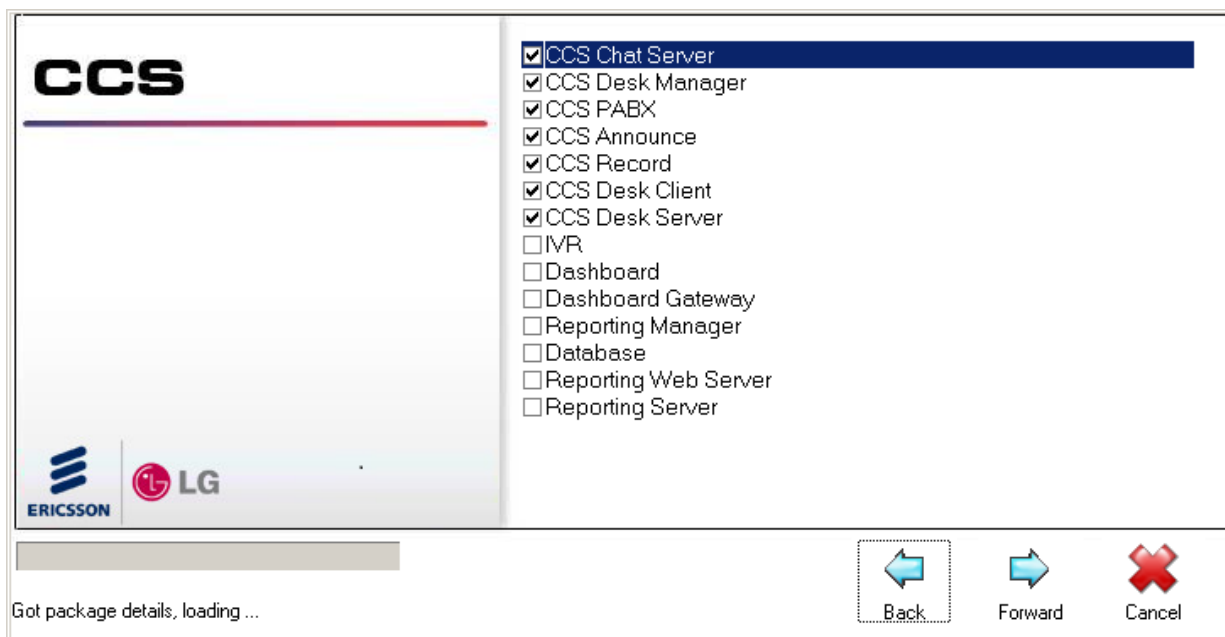
Software Registration Code – the CCS license package code

PABX IP Address – the IP address of the iPECS MFIM

PABX Password – the administration password for iPECS

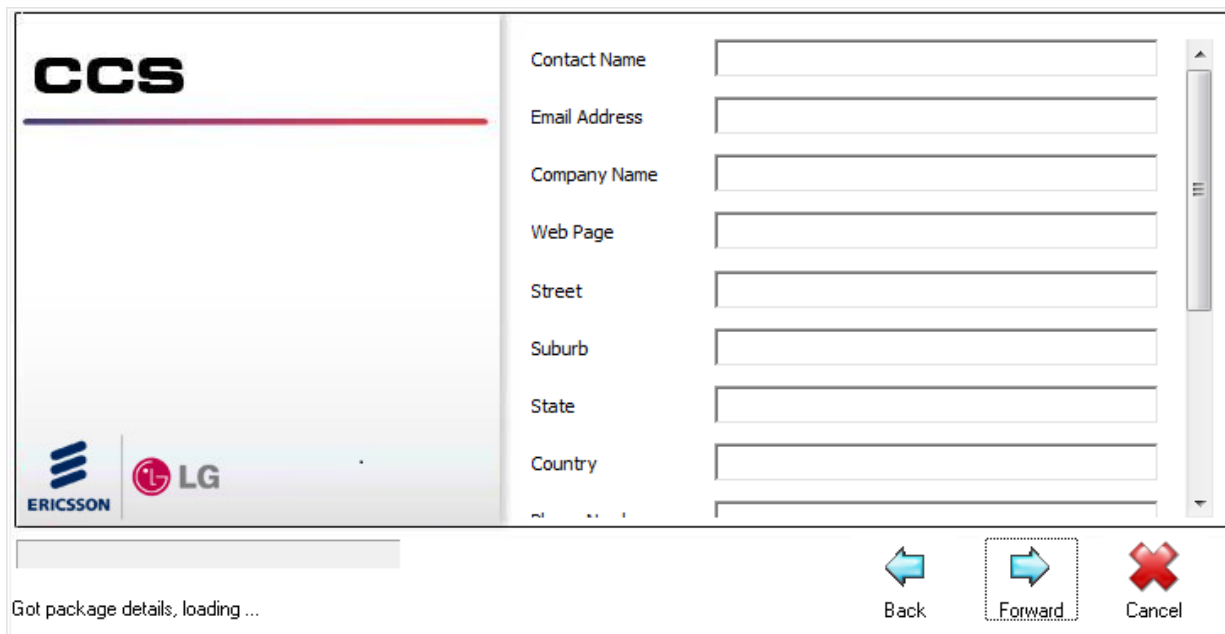


Step 5 - Choose the **CCS Desk components** to be installed and press the **Forward** button.



Step 6 - Complete the **software registration form**.

The iPECS serial number that will be linked against the license is shown at the end of the form. → Click **Forward**.



CCS

State

Country

Phone Number

Region/City

PostCode

Reseller Name

Pabx Serial Number

ERICSSON LG

Got package details, loading ...

Back Forward Cancel

Step 7 - Read and agree to the **CCS Software License Agreement** → Click **Forward**.

CCS

Software Licence Agreement

IMPORTANT - YOU SHOULD READ THIS AGREEMENT CAREFULLY BEFORE USING THIS SOFTWARE. BY VERIFYING AND USING THE SOFTWARE, YOU INDICATE YOUR ACCEPTANCE OF THE FOLLOWING SOFTWARE LICENCE AGREEMENT.

This is a Software licence agreement between you ('you' or 'Licensee') and LG-Ericsson Co., Ltd. ('LG-Ericsson') for use of the Software. This is not an agreement for sale of the Software. This is a Licence Agreement only. Please read the terms and conditions of this agreement before using the Software. By verifying and/or using the Software, you are agreeing to be legally bound by the following terms and conditions.

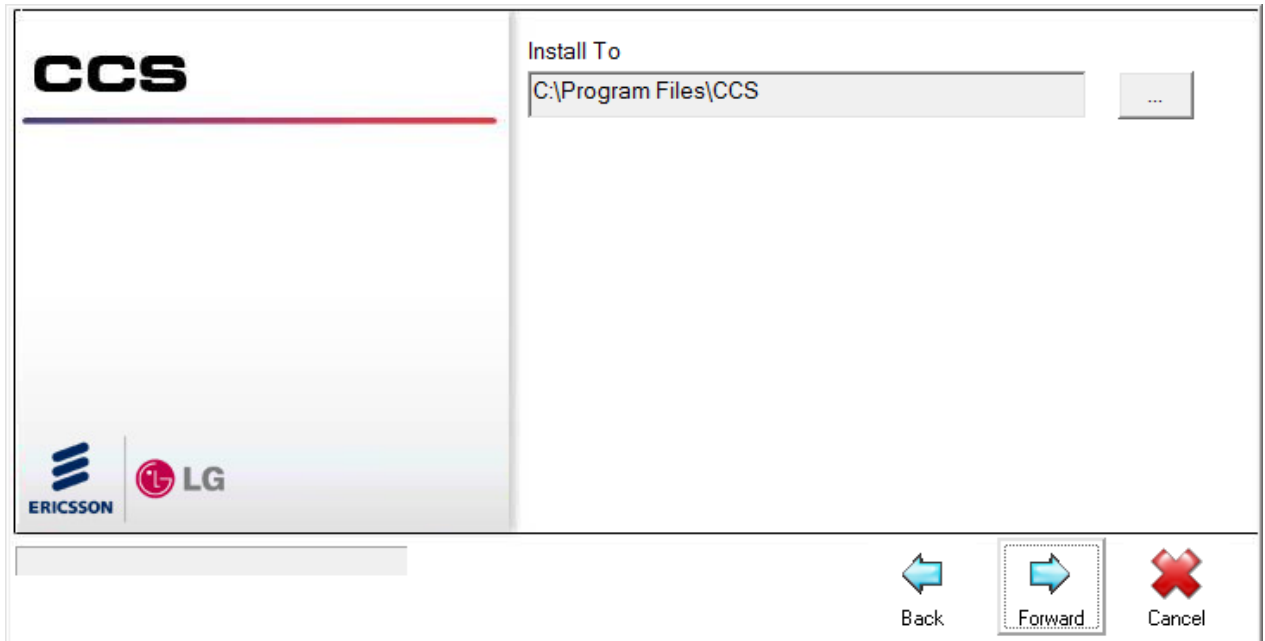
I have read and accept this licence

ERICSSON LG

Got package details, loading ...

Back Forward Cancel

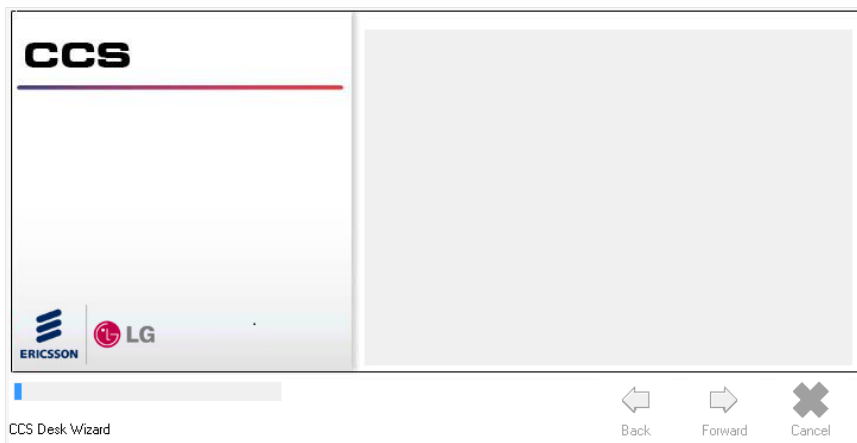
Step 8 - Confirm the **installation path** for the CCS program files → Click **Forward** to start the installation.



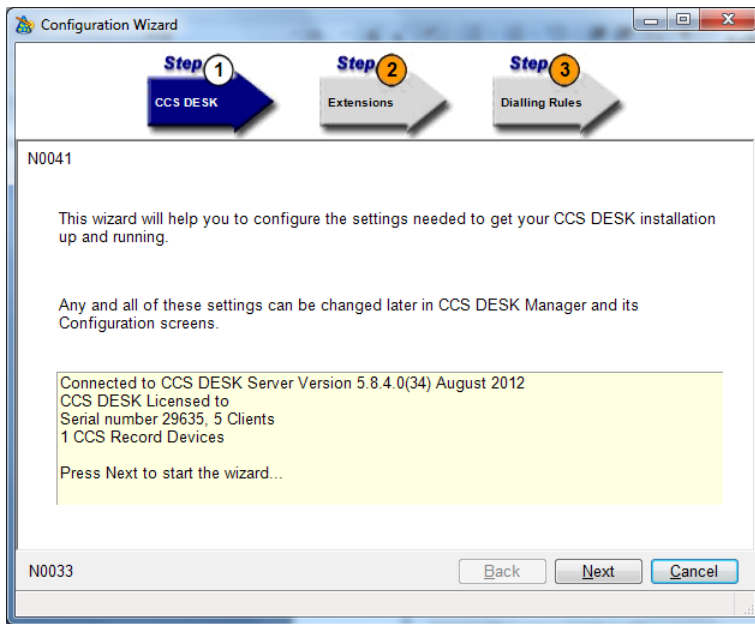
Step 11 - The CCS Installer will start **installing each component** to completion.



Step 12 - The **CCS Desk Configuration Wizard** will be launched during installation



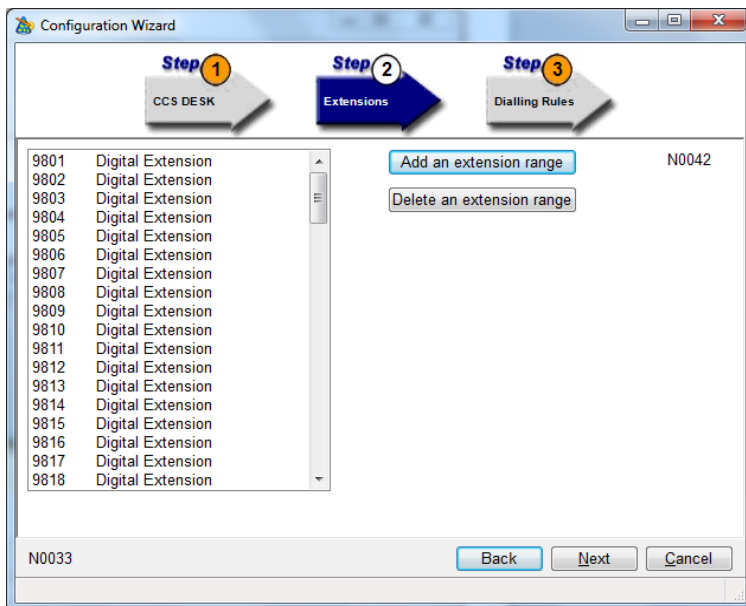
Step 12.1 - The **CCS Desk license information** is displayed → Click **Next**.



Step 12.2 - Click **Add Extension Range** → Specify the **extension numbers** in the PBX system that will be used by the CCS system → Click **Next**.

Note:

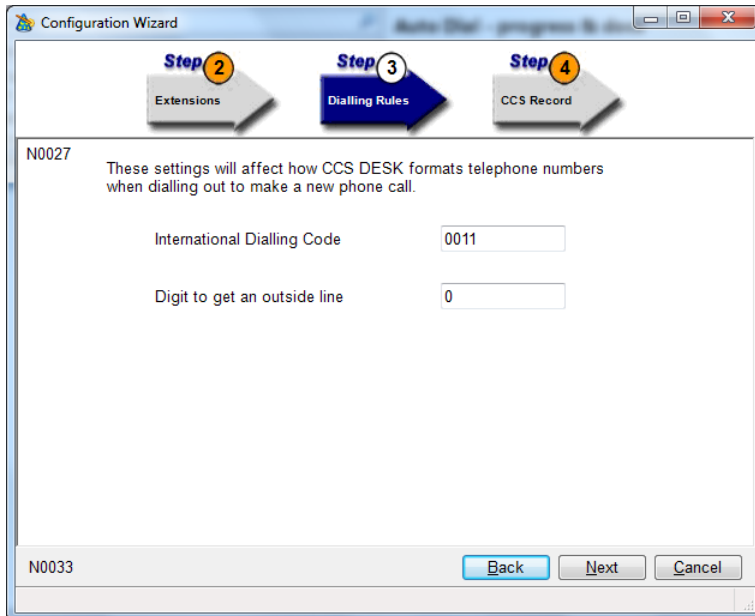
IP extensions / softphones should be added as Digital Extensions.
SLT or SIP extensions should be added as Analog Extensions.



Step 12.3 - Enter the **prefix for international dialling** and the **prefix to access an outside line** with the PBX.

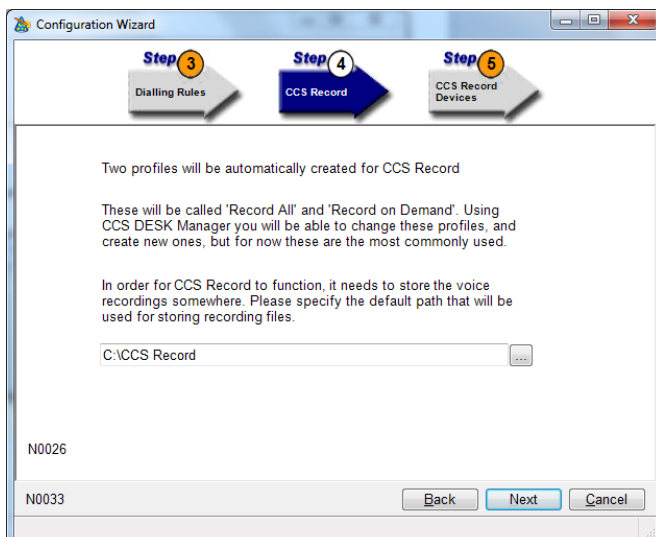
Note

This configuration must be made identical with the configuration in Windows' **Phone and Modem Options** → Click **Next**.

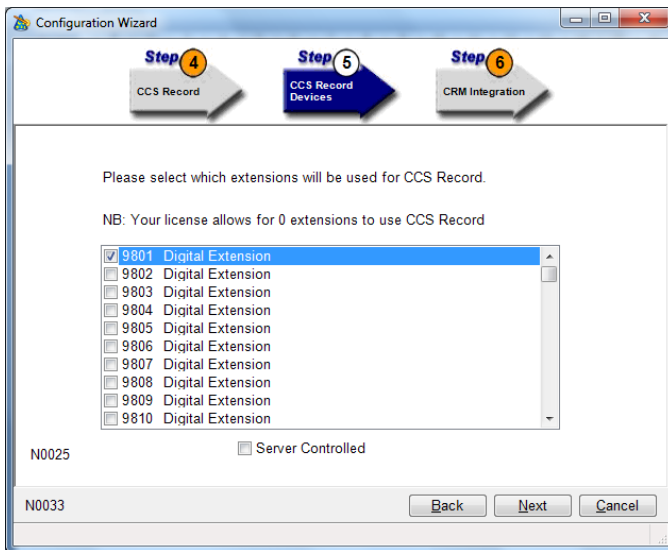


Step 12.4 - If your license contains CCS Record license for **voice recording**, the next couple of steps will be activated to allow some configuration on the call recording system.

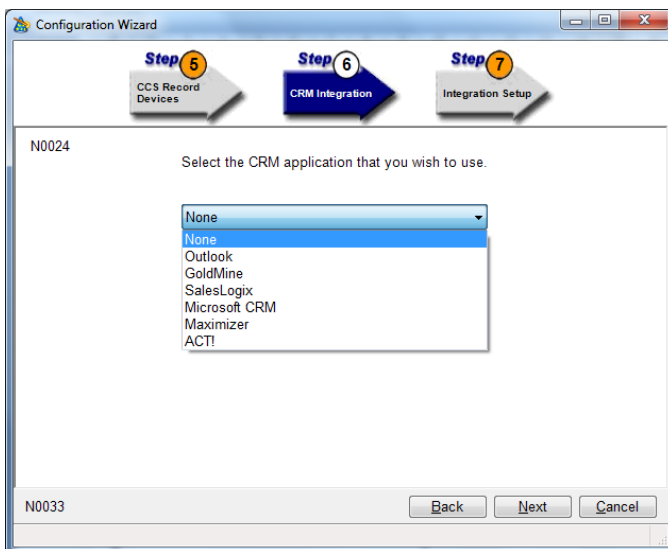
→ **Specify the path** where the voice recordings will be stored.



Step 12.5 - Select the **devices** to be recorded → Click **Next**.

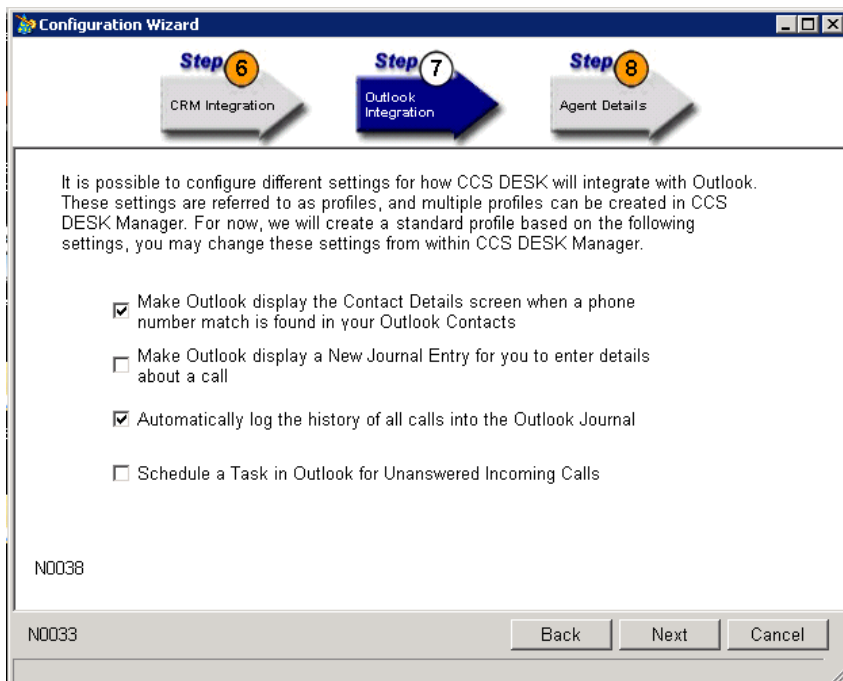


Step 12.6 - Select the CRM / Database application to be integrated with CCS Desk

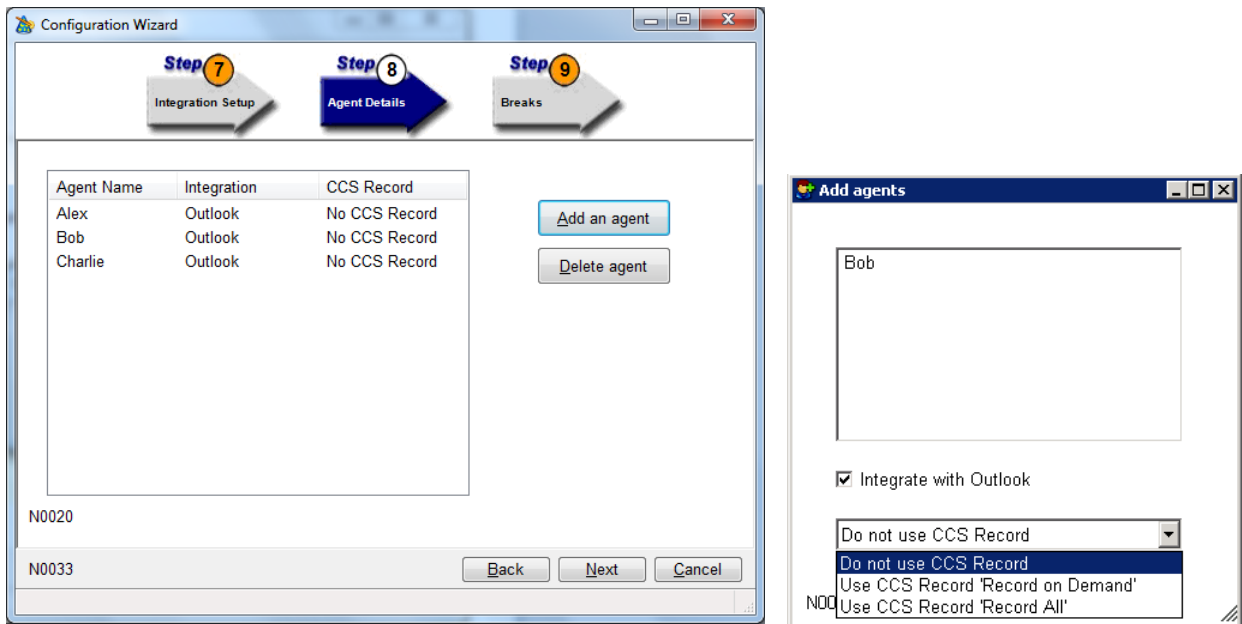


Step 12.7 - Depending on the selection at Step 11.6, this step will guide on the integration features you wish to enable → Enable the integration features as required → Click **Next**.

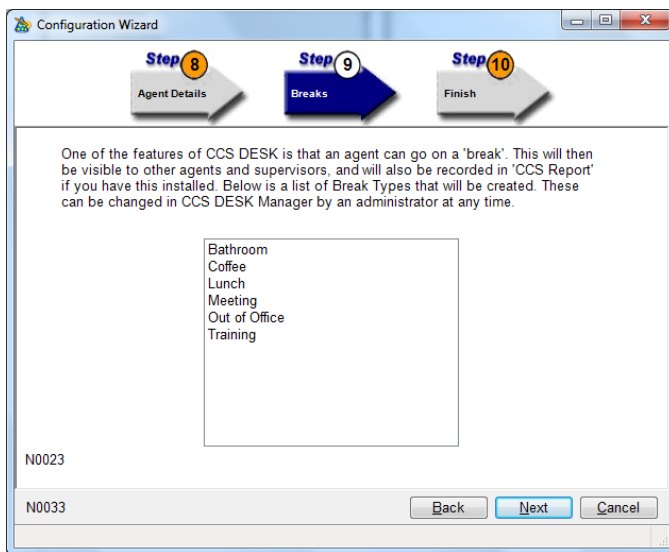
Please consult *Section 6. Configuring CCS Desk* for more information on the integration features of CCS Desk.



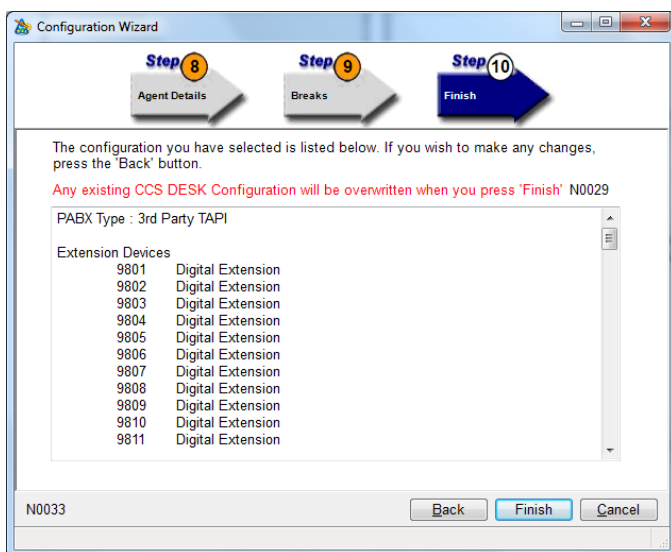
Step 12.8 - Click **Add Agents** → Enter the **name of agents** and specify optionally enable its **Integration** feature and the **CCS Record** profile.



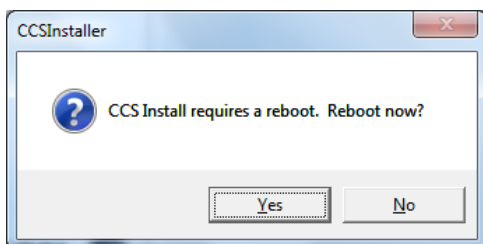
Step 12.9 - The wizard displays a number of **break status** which have automatically been created → Click **Next**.



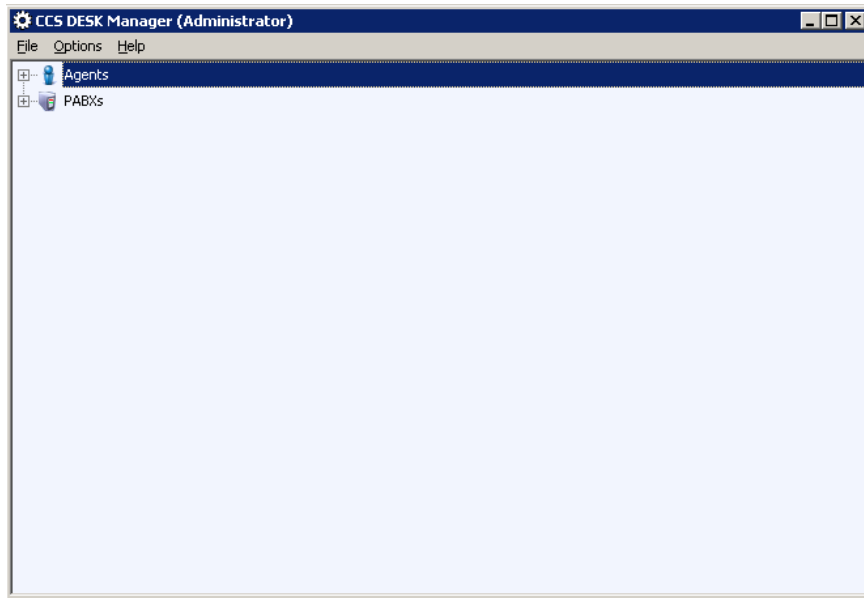
Step 12.10 - The last step will show you a **Summary** of the selected wizard configurations. → Click **Finish** to complete the wizard and continue with the install.



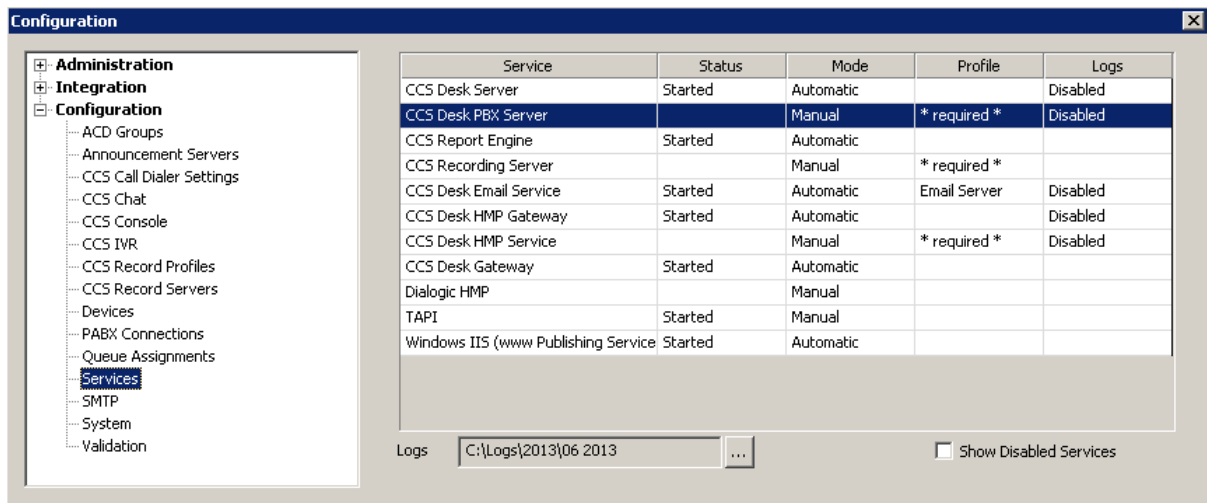
Step 13 – Click **Yes** when prompted to reboot your Server



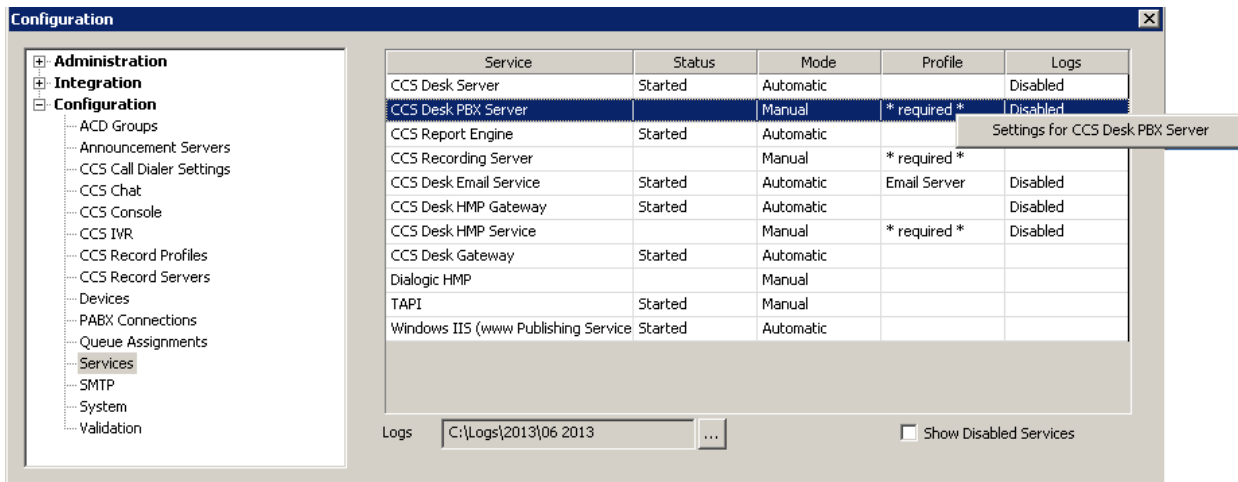
Step 14 - Once you have logged back in to the server → Launch **CCS Desk Manager** from the start menu: **Start → All Programs → CCS**.



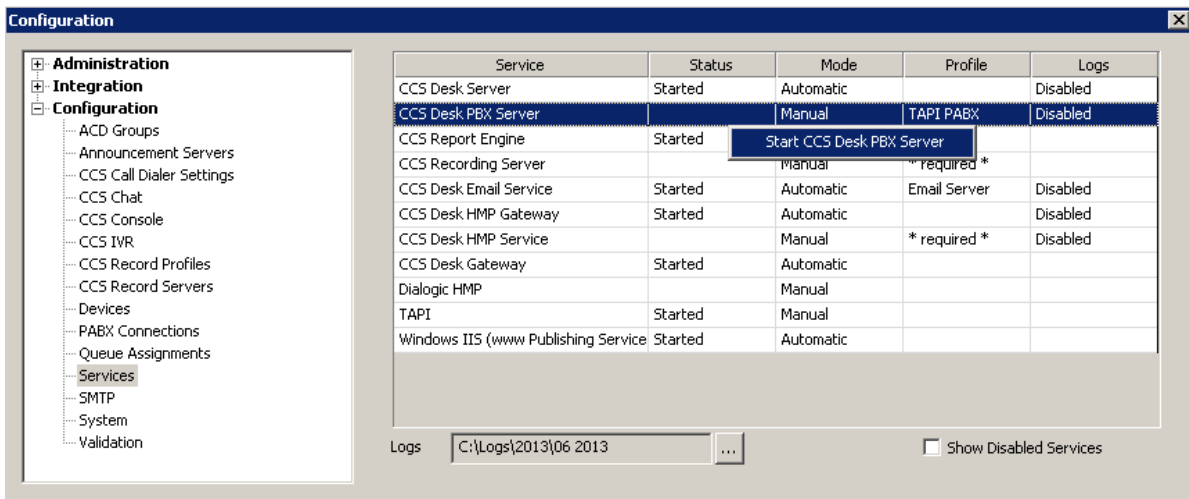
Step 15 - Click on **Options** → Select **Configure**, then the Configuration window will appear. Go to **Configuration** → **Services**.



Step 16 – Right click on the Profile for **CCS Desk PBX Server** → Click on **Settings for CCS Desk PBX Server** → then on the Server Selection drop down list select **TAPI PABX** → Click **OK**



Step 17 – Start CCS Desk PBX Server by right clicking on the Status -> Click **Start CCS Desk PBX Server**

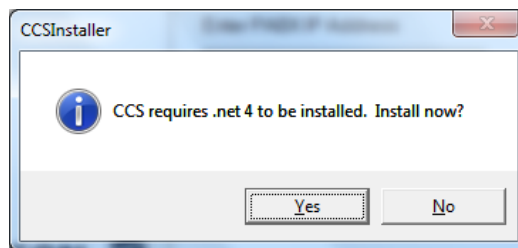


2.2.2 CCS Desk Client

Step 1 - Run the **CCSInstaller** application with Administrator privilege.



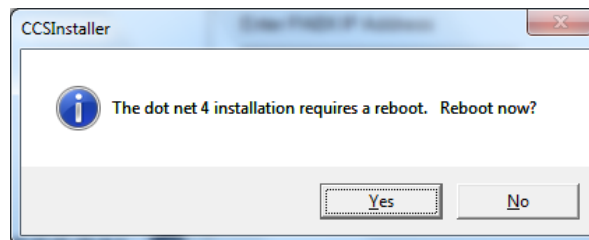
Step 2 - If **Microsoft .NET Framework 4.0** is not already installed, you will receive the message to install it → Select **Yes**.



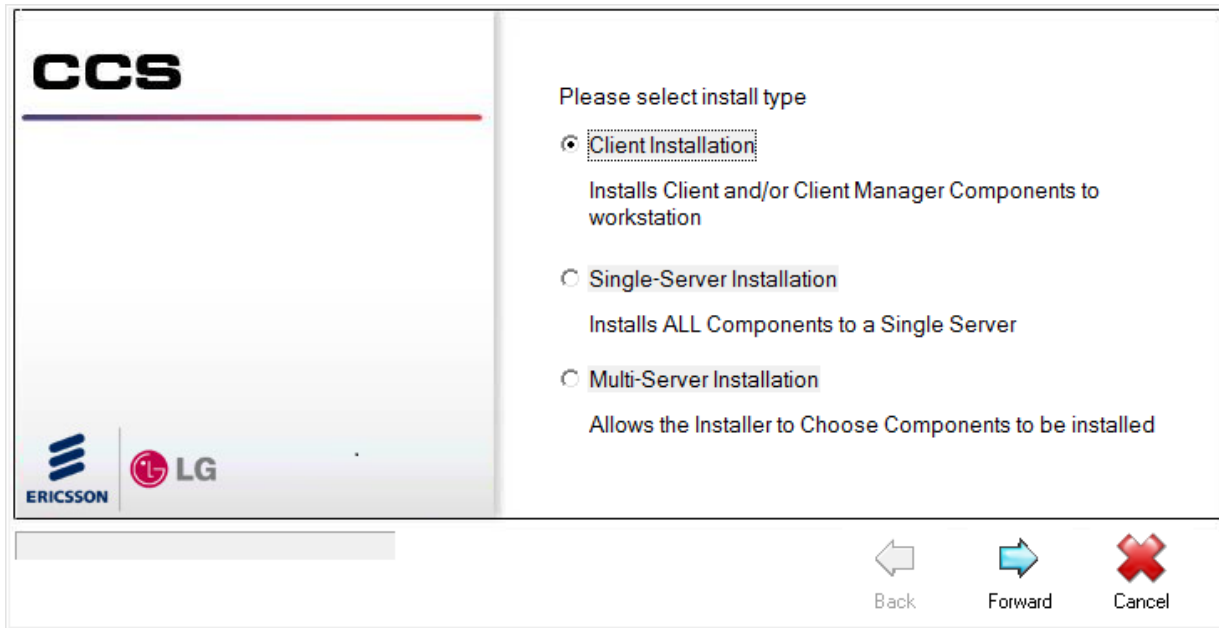
The installation may take a few minutes to complete.

NOTE

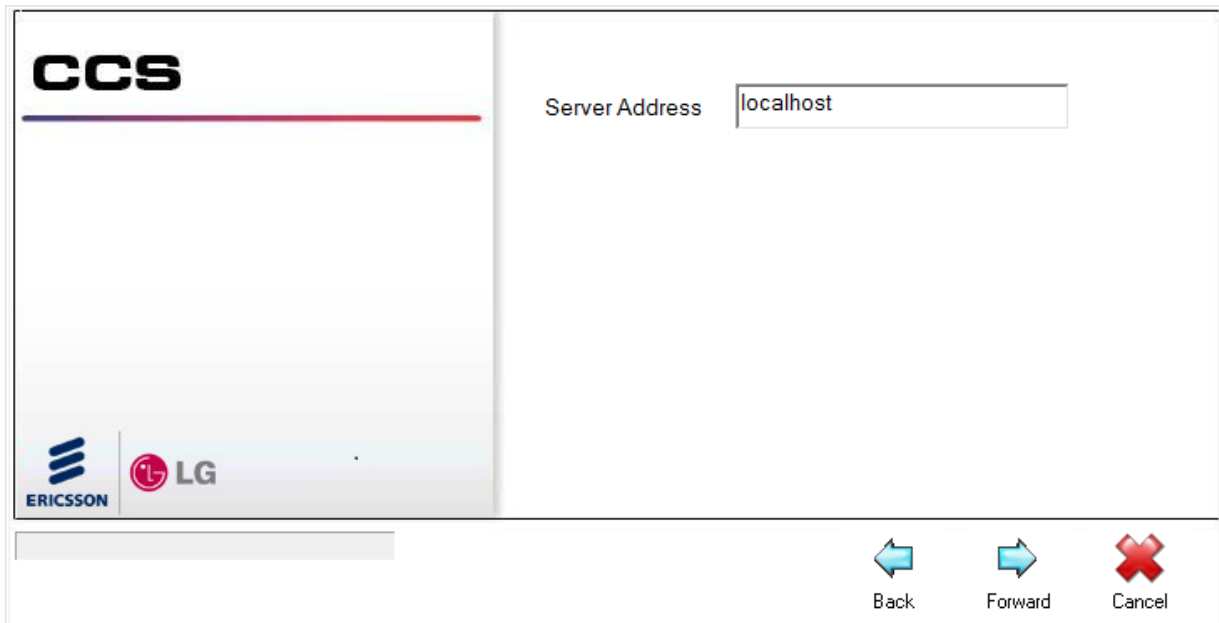
You will be prompted to **reboot** your system once the install completes. Please ensure you do the reboot before continuing with the install



Step 3 - Once you log back in the CCS Installation will continue and you will receive the Option to Install the Client or Server → Select **Client Installation** → Click **Forward**.

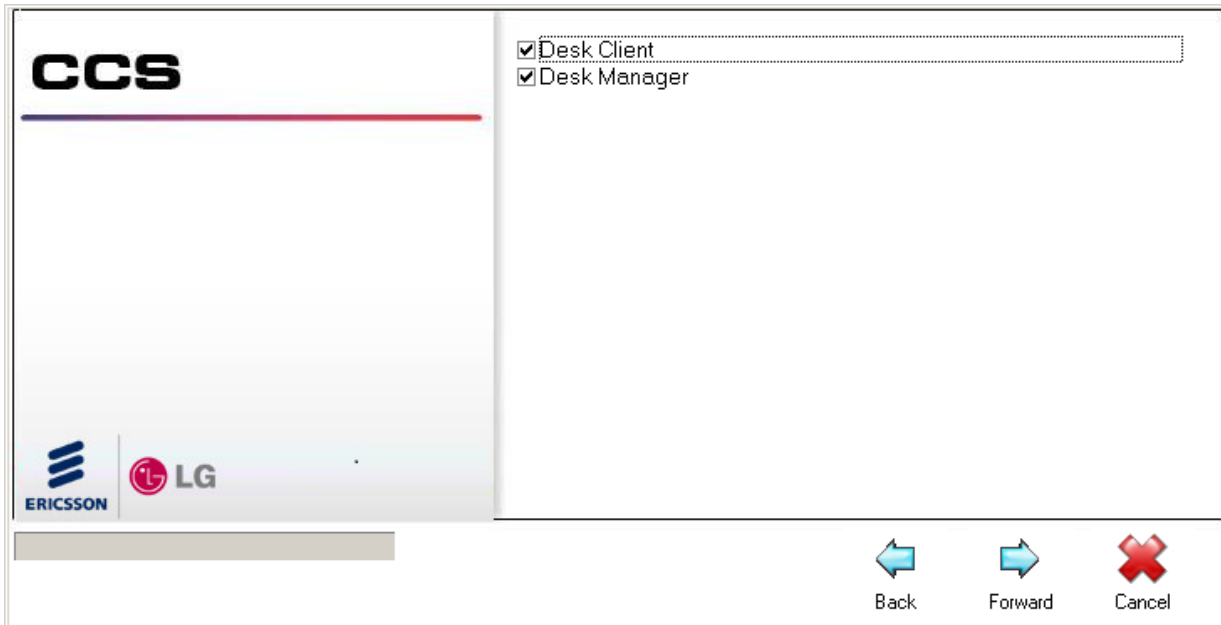


Step 4 - Enter the **CCS Desk Server** address → Click **Forward**.

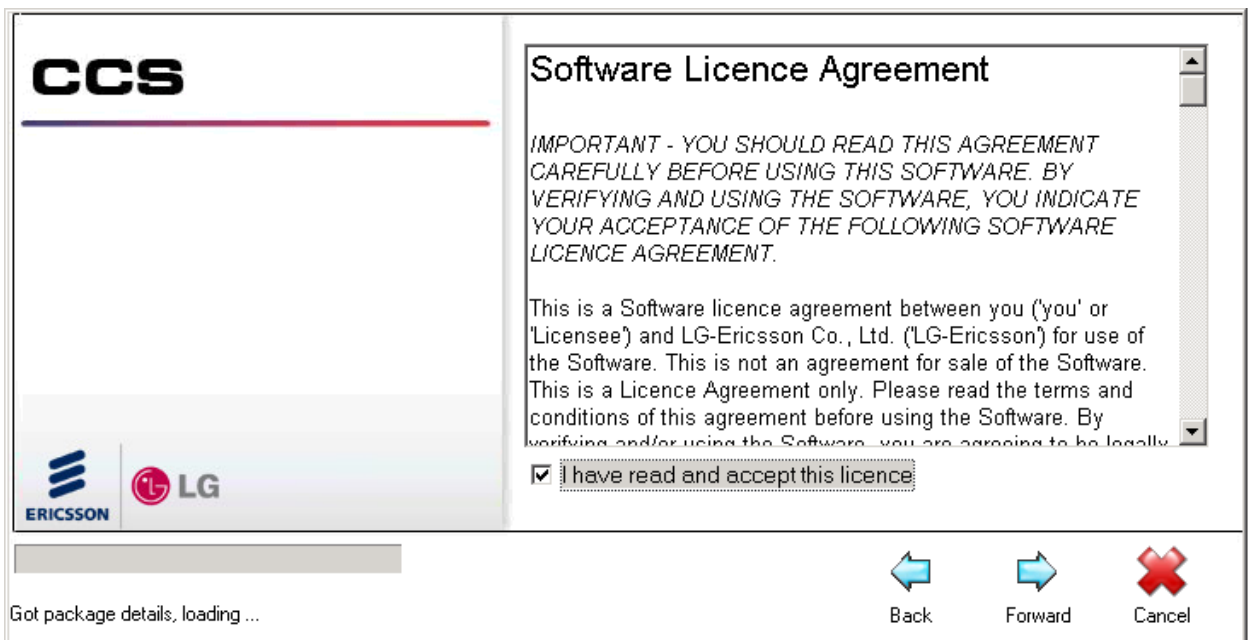


Step 5 - Choose the **CCS Desk Client Components** to be installed → Click **Forward**.

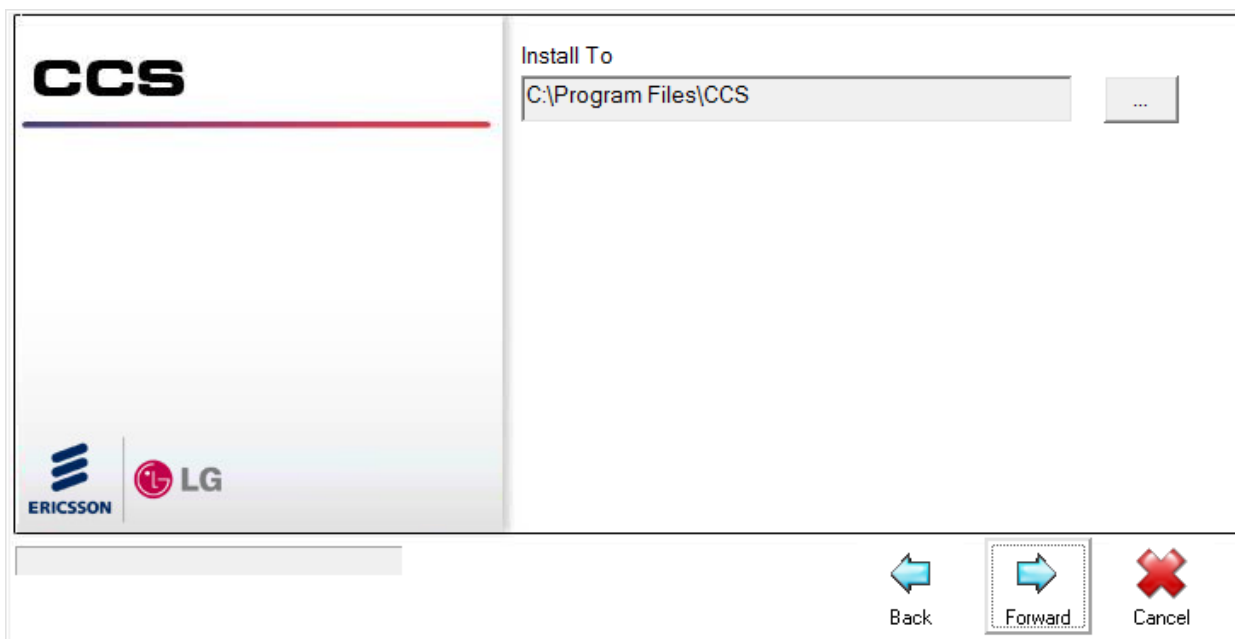
Other CCS components might also be listed if the server components are also running on the same server machine.



Step 6 - Read and agree to the **CCS Software License Agreement** → Click **Forward**.



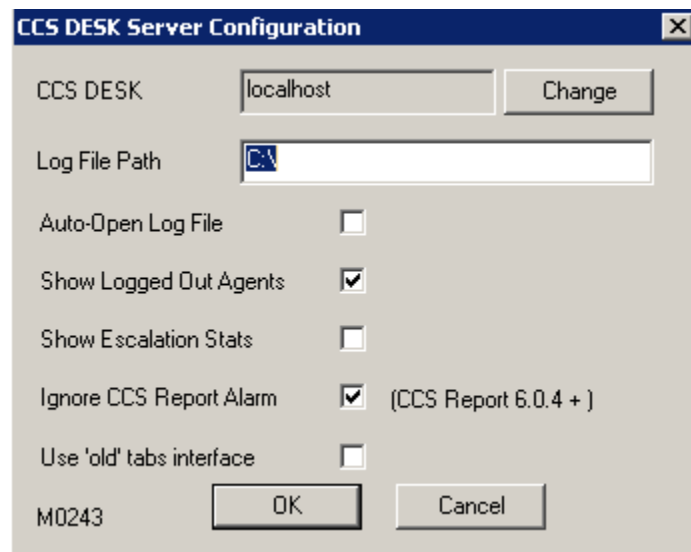
Step 7 - Confirm the **installation path** for the CCS program files → Click **Forward**.



Step 8 - After the installation has finished, Launch **CCS Desk Manager** from the start menu: **Start → All Programs → CCS**.



Step 9 – Click on Options → Select **CCS Desk Manager Options** → click on **Change** button → Specify the location of the server on the CCS Desk input box → Click **OK**.

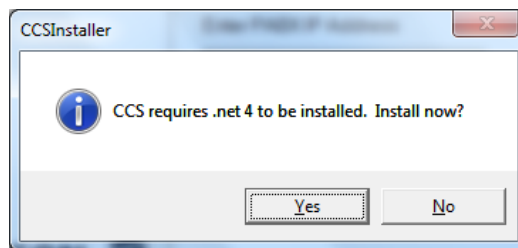


2.2.3 CCS Desk Manager

Step 1 - Run the **CCSInstaller** application with Administrator privilege.



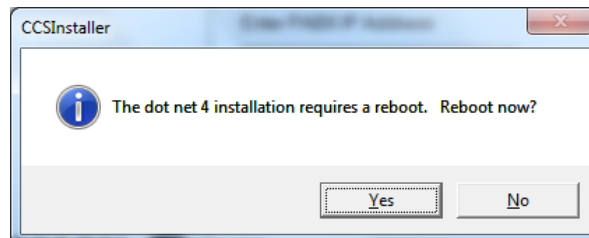
Step 2 - If **Microsoft .NET Framework 4.0** is not already installed, you will receive the message to install it → Select **Yes**.



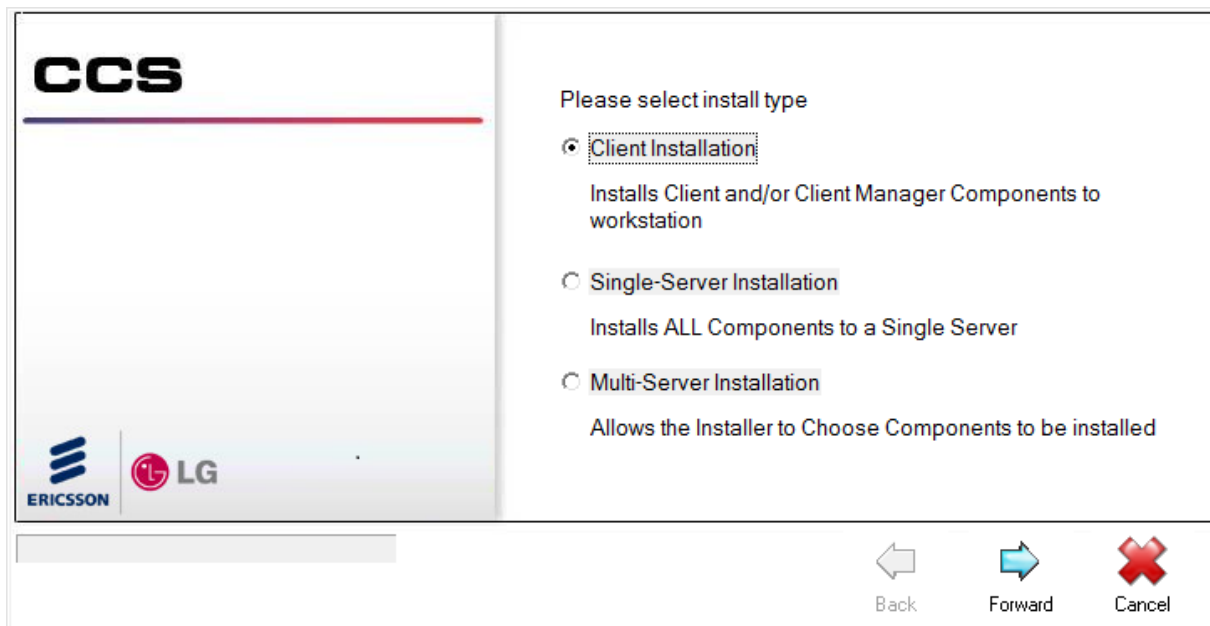
The installation may take a few minutes to complete.

NOTE

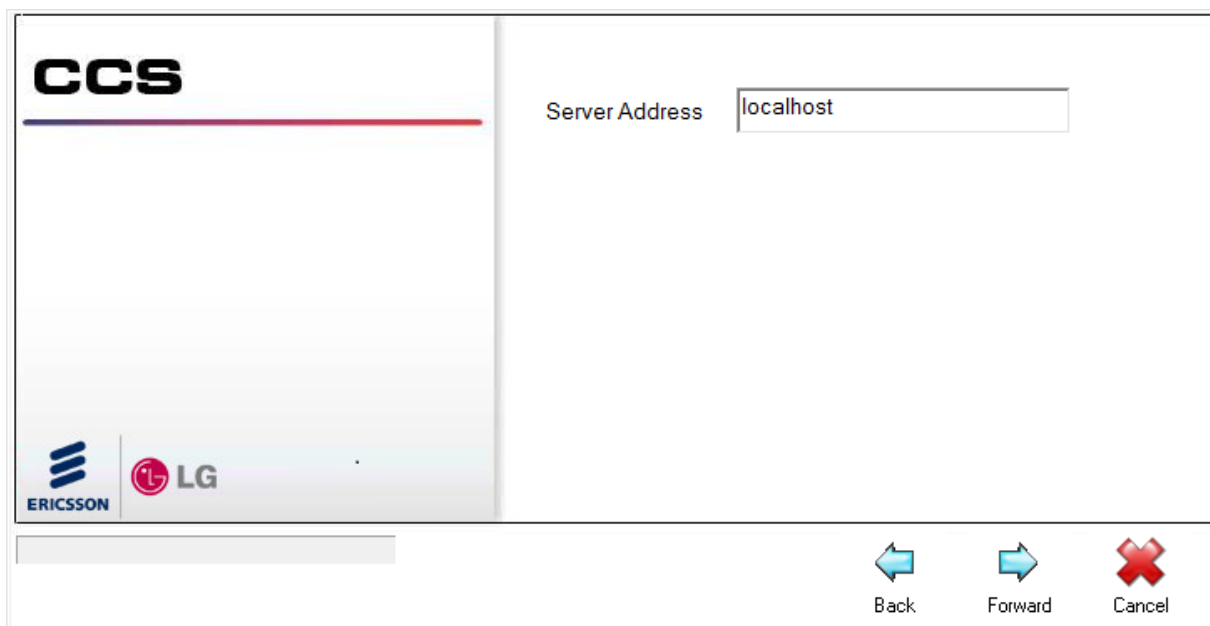
You will be prompted to **reboot** your system once the install completes. Please ensure you do the reboot before continuing with the install



Step 3 - Once you log back in the CCS Installation will continue and you will receive the Option to Install the Client or Server → Select **Client Installation** → Click **Forward**.



Step 4 - Enter the **CCS Desk Server** address → Click **Forward**.

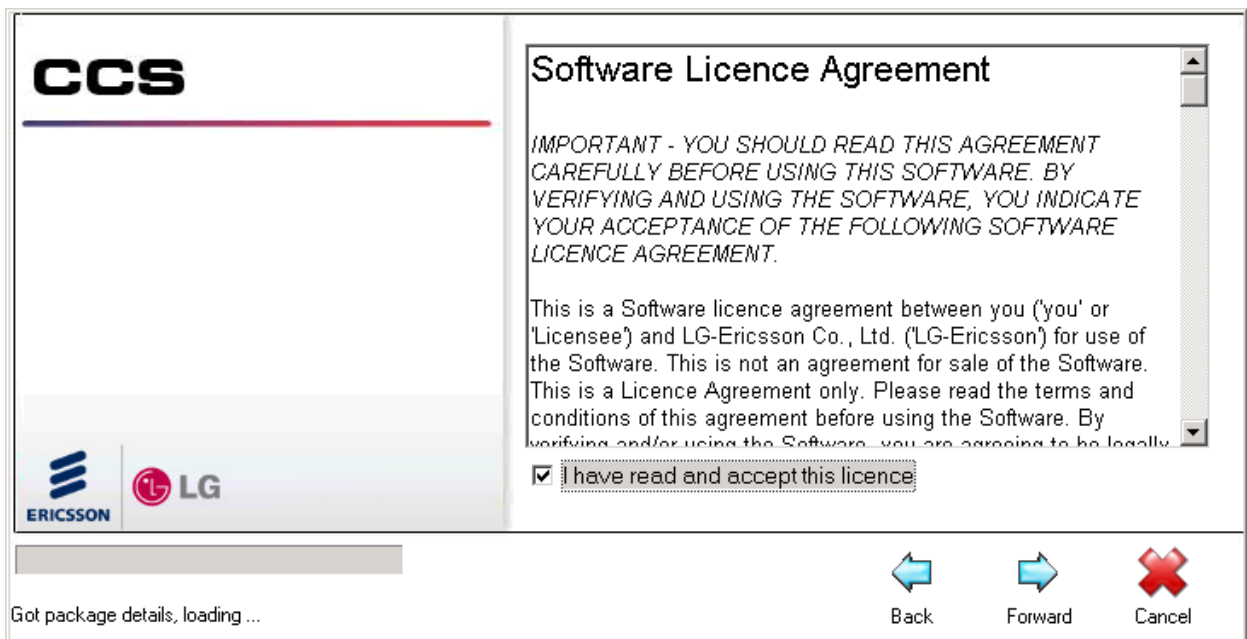


Step 5 - Choose the **CCS Desk Client Components** to be installed → Click **Forward**.

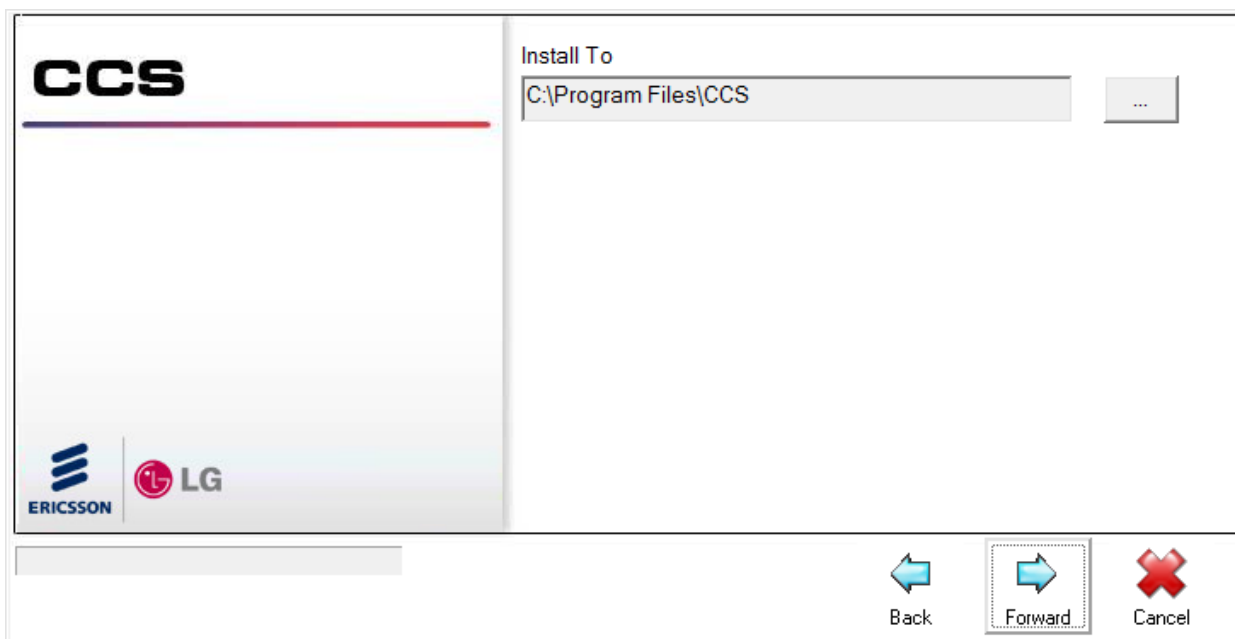
Other CCS components might also be listed if the server components are also running on the same server machine.



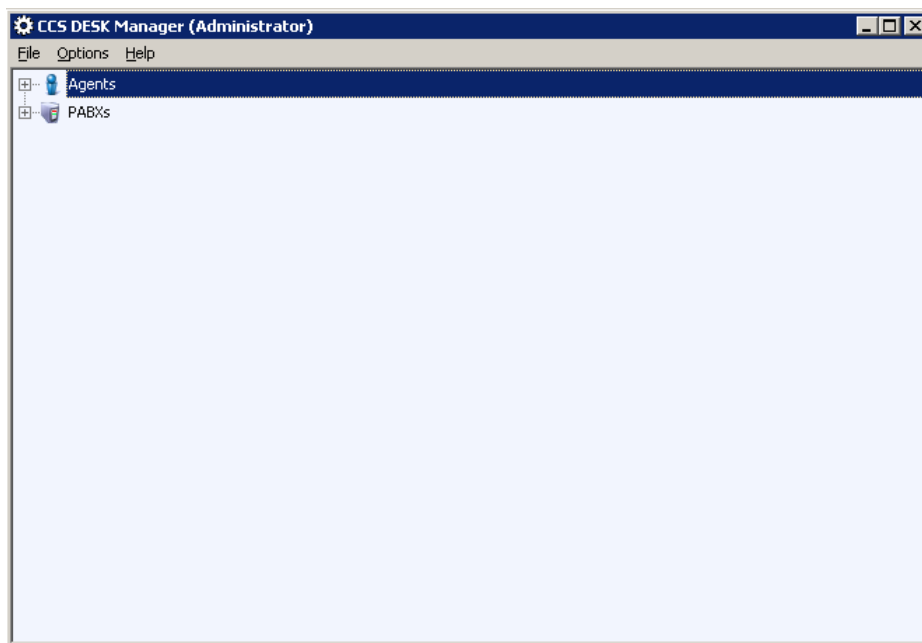
Step 6 - Read and agree to the **CCS Software License Agreement** → Click **Forward**.



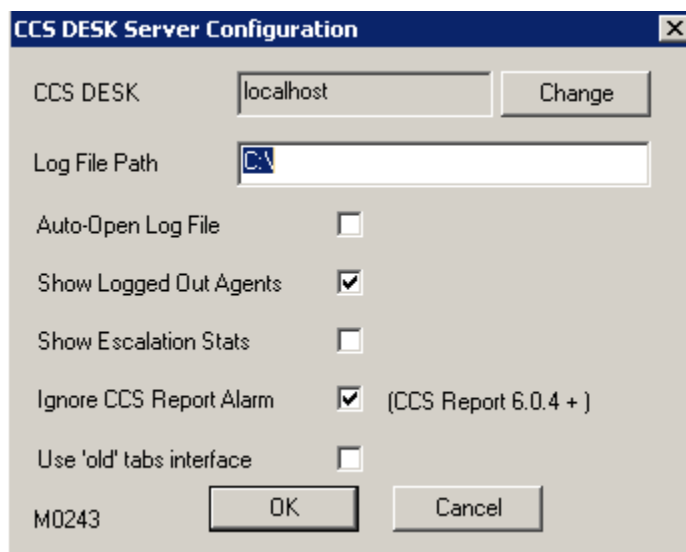
Step 7 - Confirm the **installation path** for the CCS program files → Click **Forward**.



Step 8 - After the installation has finished, Launch **CCS Desk Manager** from the start menu: **Start → All Programs → CCS**.



Step 9 - Click on Options → Select **CCS Desk Manager Options** → click on **Change** button → Specify the location of the server on the **CCS Desk** input box → Click **OK**.



3. iPECS CCS Q INSTALL

3.1 Pre-Installation Requirements

The requirements for CCS Q are divided into three parts:

3.1.1 Installation of CCS Desk and CCS Report

3.1.2 Installation of Dialogic HMP

3.1.3 Telephony Requirements

3.1.1 Installation of CCS Desk and CCS Report

Before CCS Q can be configured, the installation of CCS Report and CCS Desk must be completed.
Please consult Section 2 and CCS Report User Manual for more information.

3.1.2 Installation of Dialogic HMP

CCS Q requires Dialogic HMP platform for call queuing. *Please consult Section 5 for more information.*

3.1.3 Telephony Requirements

There are additional telephony requirements and configurations that must be completed when using Dialogic HMP:

→ PBX must have sufficient 'SIP Phone' and 'CCS SIP' licenses.

If CCS Q is licensed with 4 ports, the number of licenses required for each category is 4.

→ SIP phones must be configured with the following settings:

- Registering mode = REGISTER
- Registration Timer Usage = ON
- Registration Time = 60
- DTMF = INFO (RELAY)

→ Create an **ACD hunt group** with all the SIP devices as its member.

→ Depending on trunk lines connected to the PBX, there might be additional telephony requirements and configurations that must be completed:

IP / Digital trunks

- No further telephony requirement needed. However it is recommended to have at least one analog extension for possible future needs.

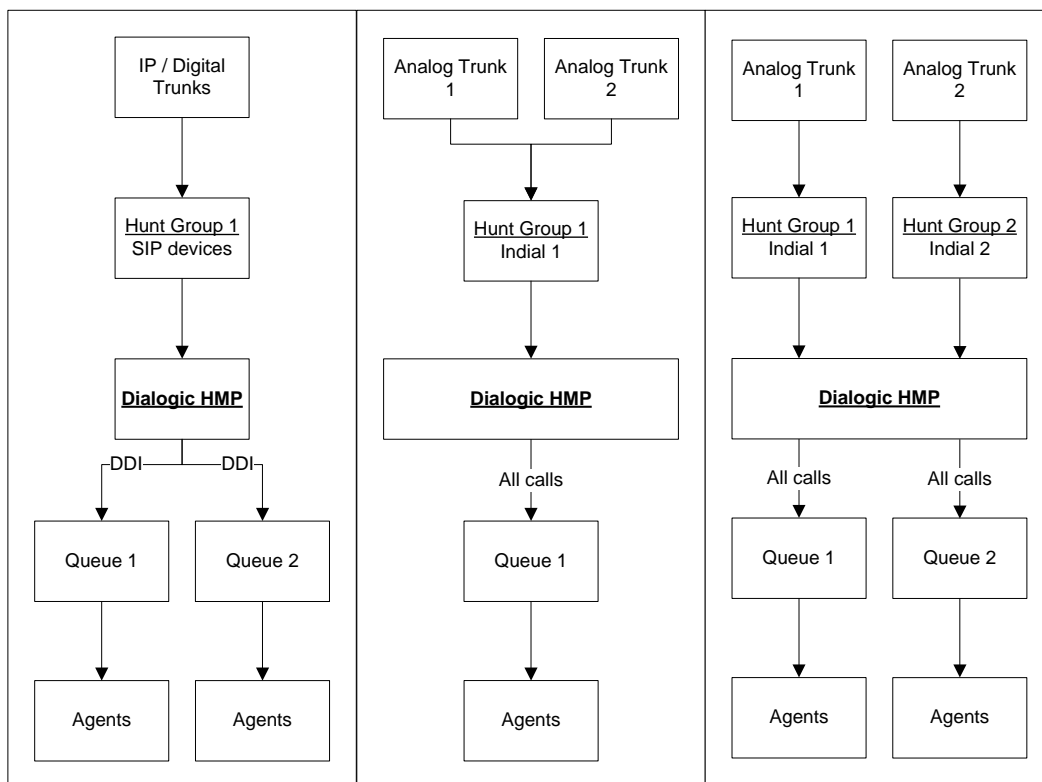
Analog trunks

- At least one analog device is required to be used as an initial extension.
- One initial extension can only handle one routing destination. E.g. if CO 1 – CO 4 has different CCS Q destination to CO 5 – CO 8, then two analog devices will be required as initial extensions.
- Create ACD hunt group(s) for each initial extension. Each group must only have one initial extension as the only member.

Both

- Same as PSTN requirement.

The schematic diagram below describes how the requirements are connected together:



3.2 CCS Q Configuration

We will assume the following configurations have been properly setup in the PBX and CCS license:

ISDN BRI = line 1 – line 2

DDI 5520 9800 → must go to Reception queue

DDI 5520 9888 → must go to Sales queue

PSTN = line 3 – line 5

Line 3 → must go to VIP queue

Line 4 – 5 → Dedicated Outbound lines

SIP devices for HMP= 101, 102, 103, 104

Hunt Group for SIP devices = 620

Analog device for Indial = 205

Hunt Group for 205 = 605

CCS Q Announcement port license = 4

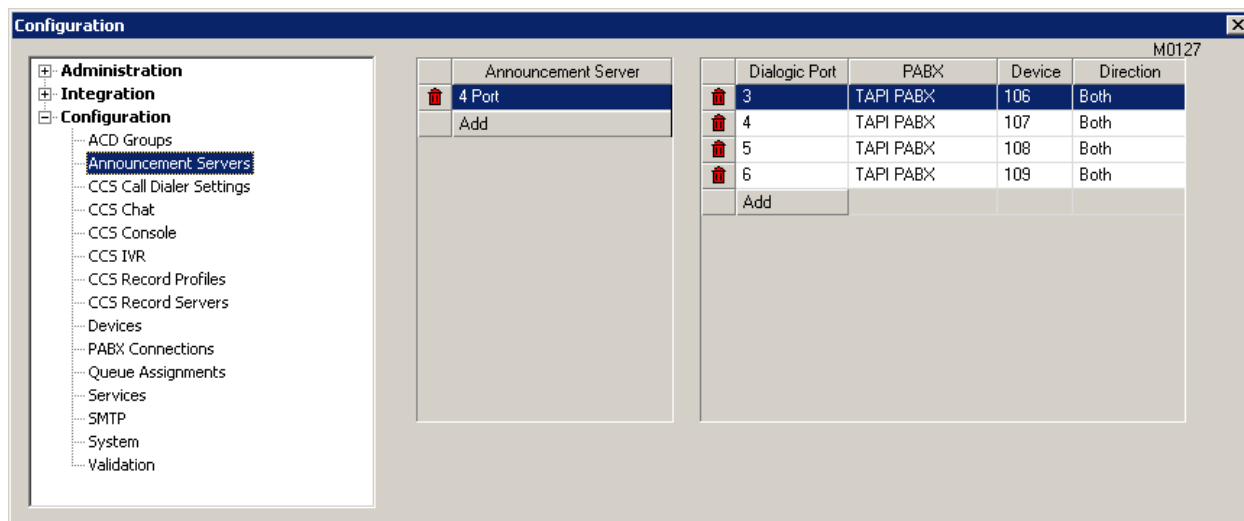
HMP licenses = 4

3.2.1 Announcement Server

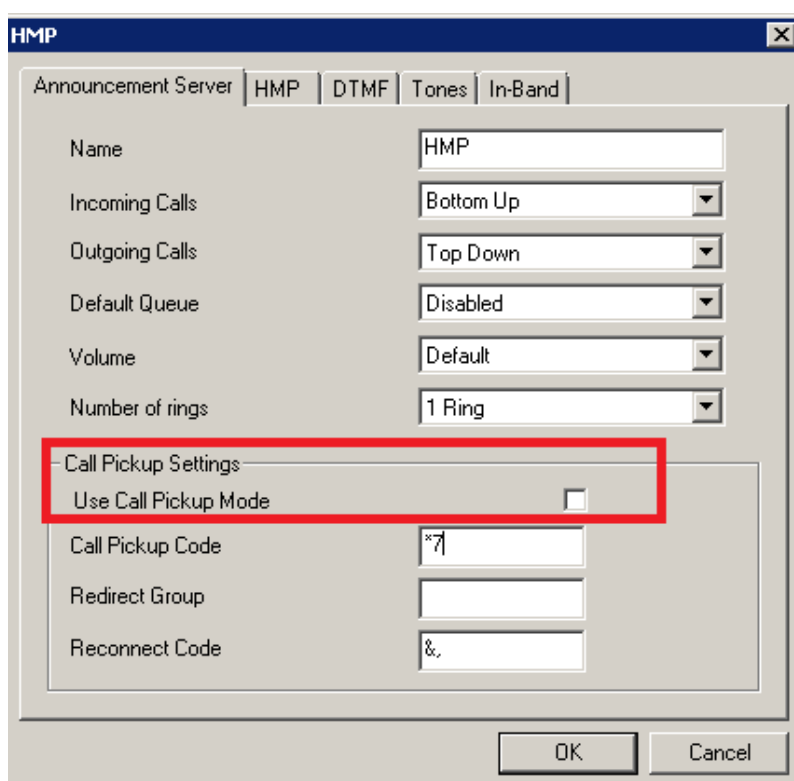
Step 1 - Open CCS Desk Manager → Select **Options** → Select **Configure** → Login to **CCS Desk Manager Configuration**

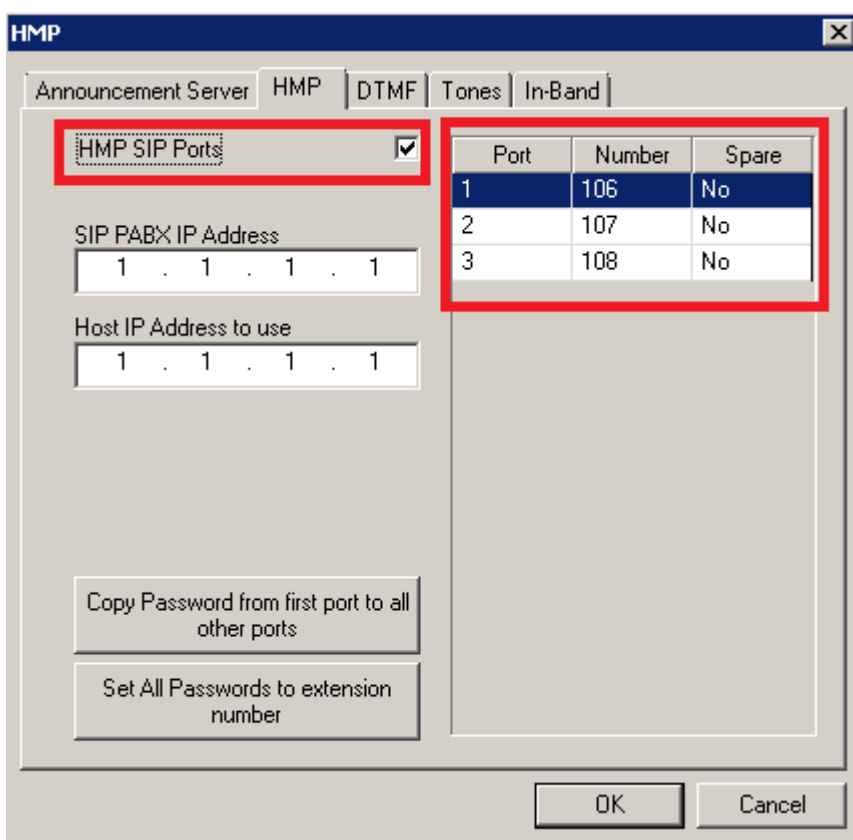
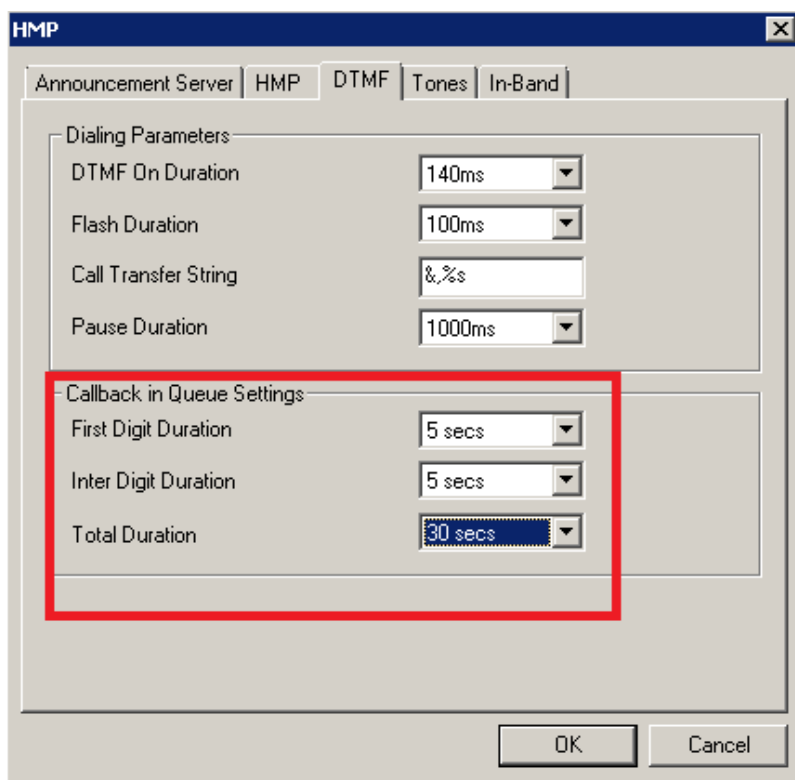
Step 2 - Go into the **Announcement Servers** tab → Create an **Announcement Server profile** to integrate Dialogic HMP with the PBX.

Please consult *Section 6.3.1* for detailed information on each setting.



Step 3 - **Double Click** the relevant Announcement Server to view the **Announcement Server Configuration** window as shown below.





The important settings are highlighted:

a) **Call Pickup Mode Parameters**

- a. **Use Call Pickup Mode** must remain **disabled**

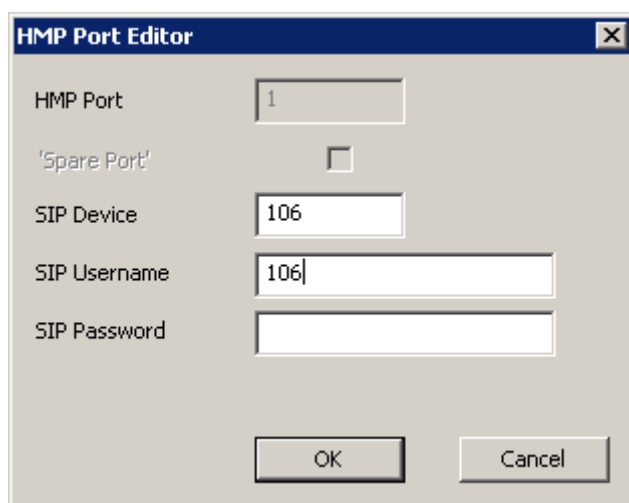
b) **Callback in Queue Settings**

- a. This set of options must be configured if CCS Q Callback-In-Queue is to be used. The recommended settings are as shown.

c) **HMP**

- a. **HMP SIP Ports** must be enabled
- b. **Requires Spare Channel** must remain **disabled**

Double click on each port and configure the SIP registration settings.



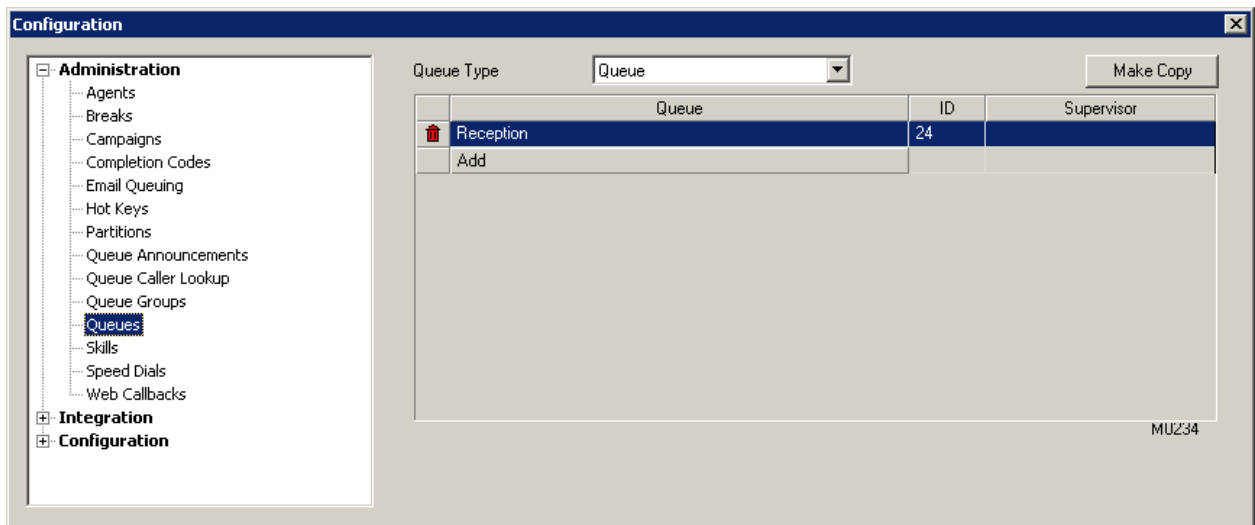
3.2.2 Queues

Step 1 - In **CCS Desk Manager Configuration** → Go into the **Queues** tab

Step 2 - Change **Queue Type** to **Queue** → Click **Add** to create the following queues accordingly:

Reception, Sales and **VIP**.

There are various queue types available; however for this example we assume the correct queue type is **Queue** because the agents have to be assigned into the queues.

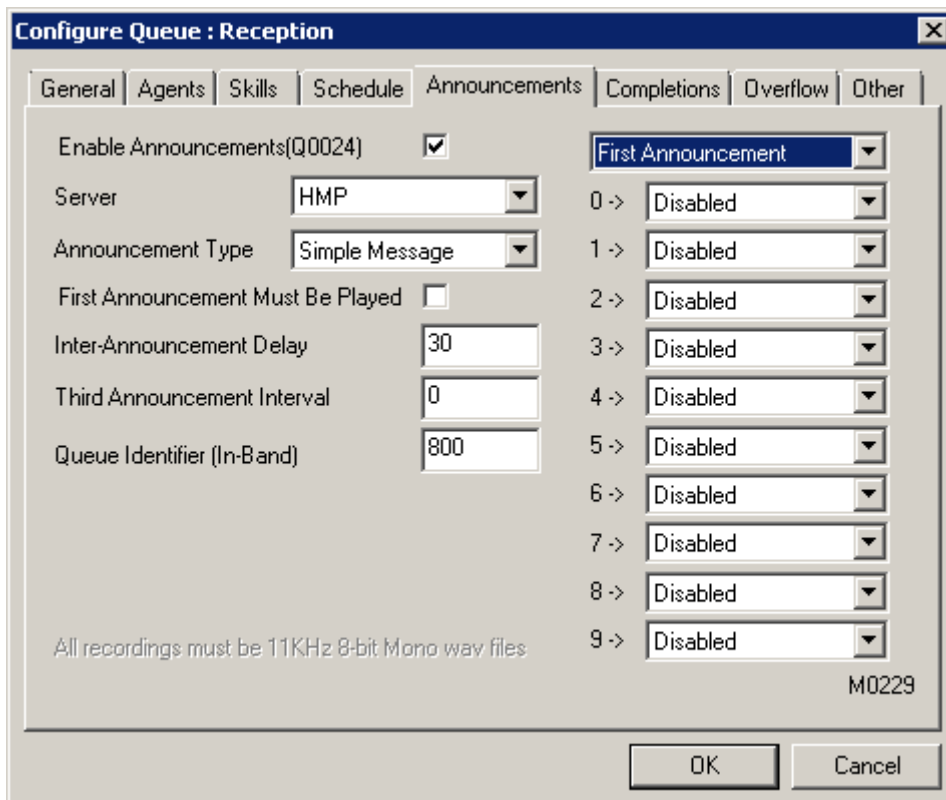


Step 3 - **Double click** on a queue to enter its detailed settings.

→ It is important to **choose the correct announcement server** (if there are multiple announcement servers).

→ For the **Reception** and **Sales** queues, it is also important to configure the **Queue Identifier** with the flexible DID that will be passed to the HMP ports as DTMF signals.

Note that this only applies to Digital lines.



Please consult Section 6.1.11.5 for detailed information on each setting.

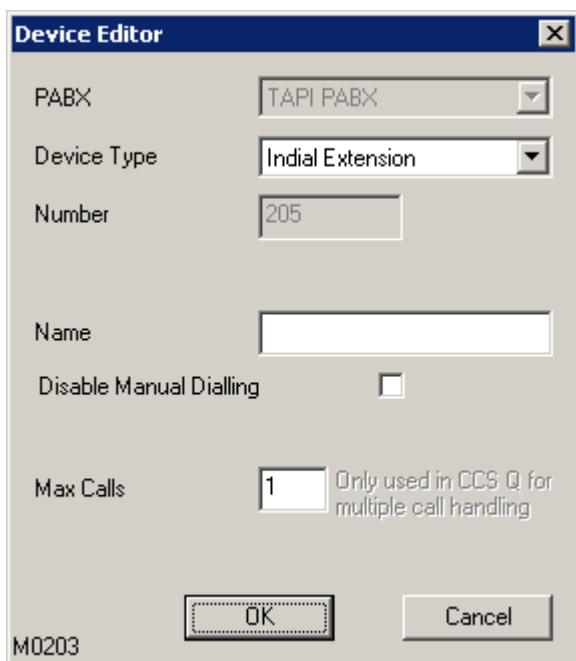
Step 4 - Repeat Step 3 for all queues that have been created.

3.2.3 Assignments

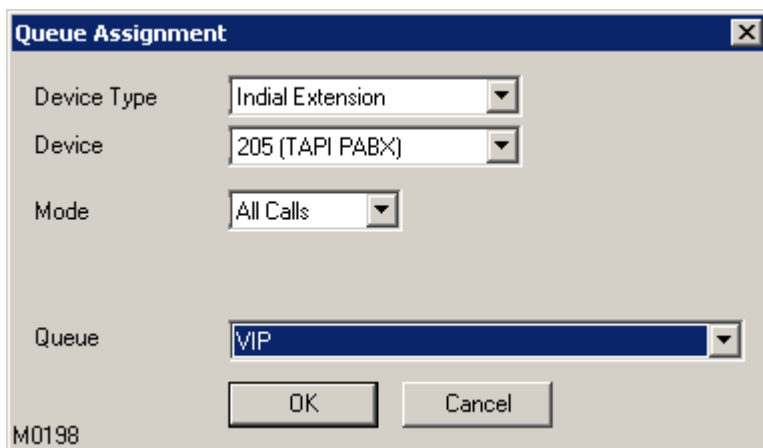
Note

Section 2.3 can be skipped when all trunks are ISDN lines. However, in the configuration scenario at the start of section 2, there are PSTN lines that must be routed to the VIP queue.

Step 1 - In **CCS Desk Manager Configuration** → Go to **Devices** tab → **Double click** on the analog device used as indial e.g. 205 → Change **Device Type** to **Indial Extension**.



Step 2 - Go to the **Assignments** tab → Create a new **Assignment** that will route **All Calls** to the **indial extension**, into the VIP queue.



Step 3 - **Configure the PBX** to deliver calls to **CCS Q**:

Flexible DID 800 → ACD Group 620

Flexible DID 888 → ACD Group 620

CO 3 → ACD Group 605

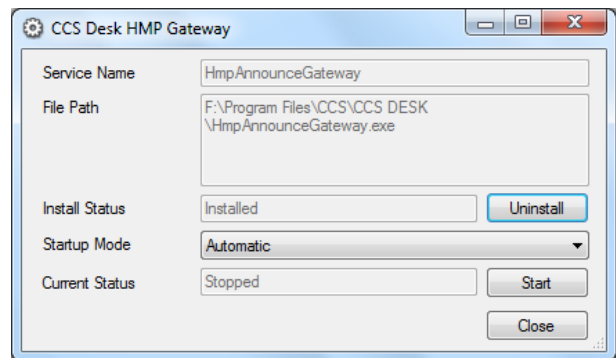
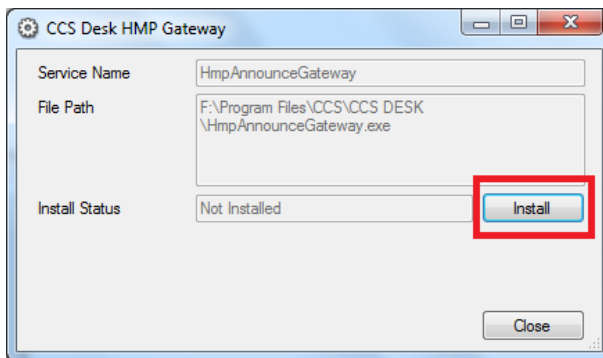
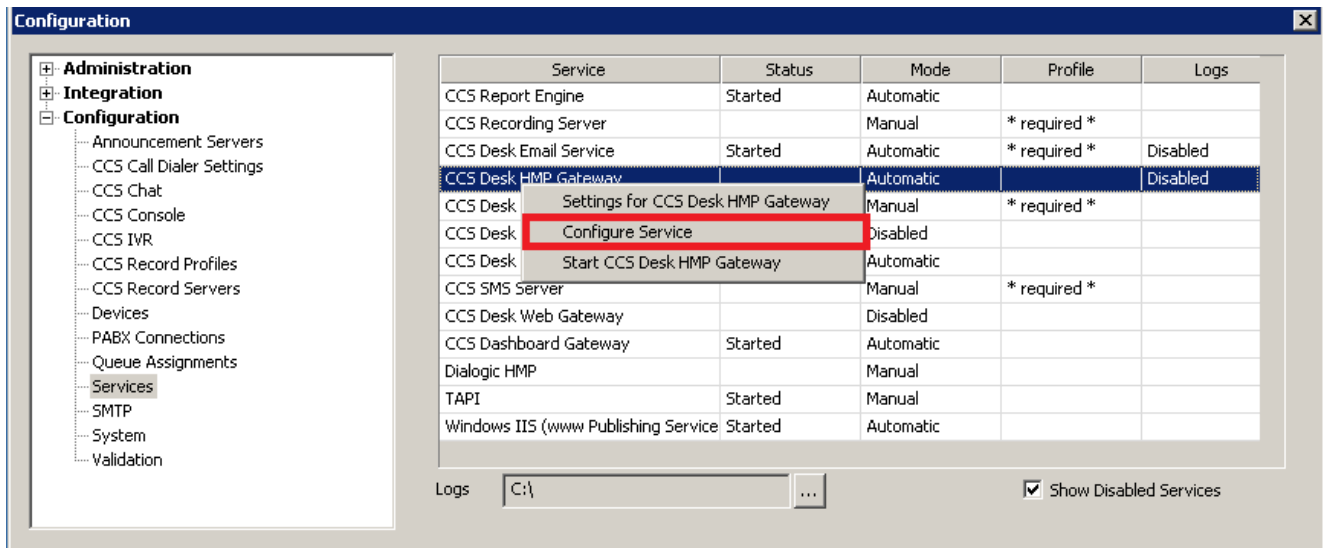
Note that the ACD Group is used as the routing destinations, not the indial (analog) device.

3.2.4 HMP Services

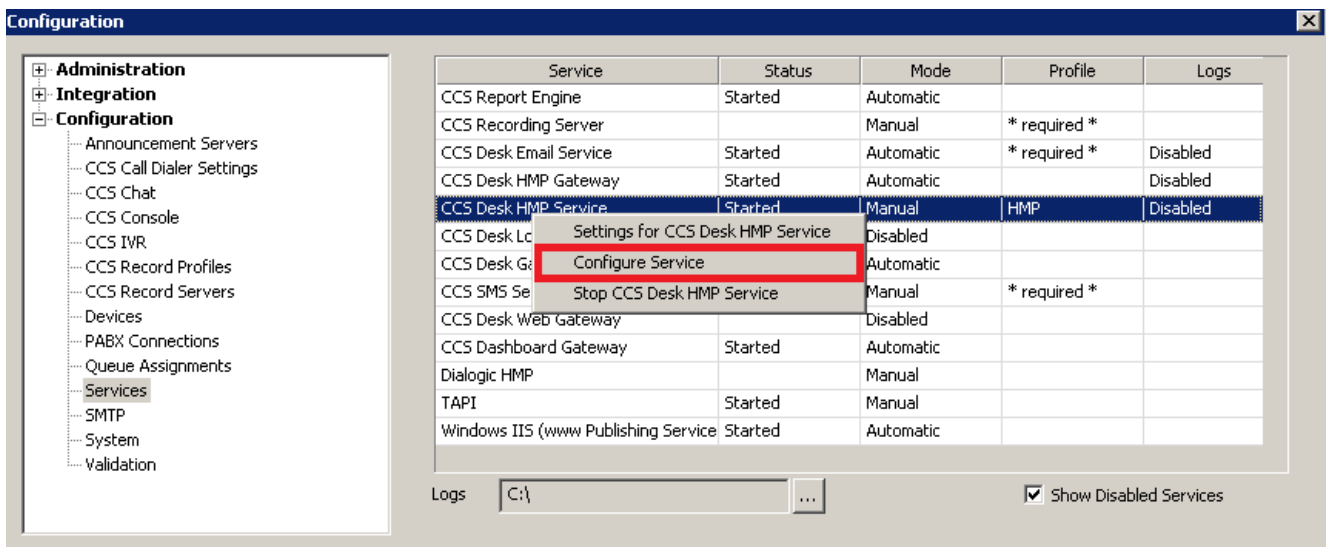
CCS Q with Dialogic HMP requires two additional services to be installed.

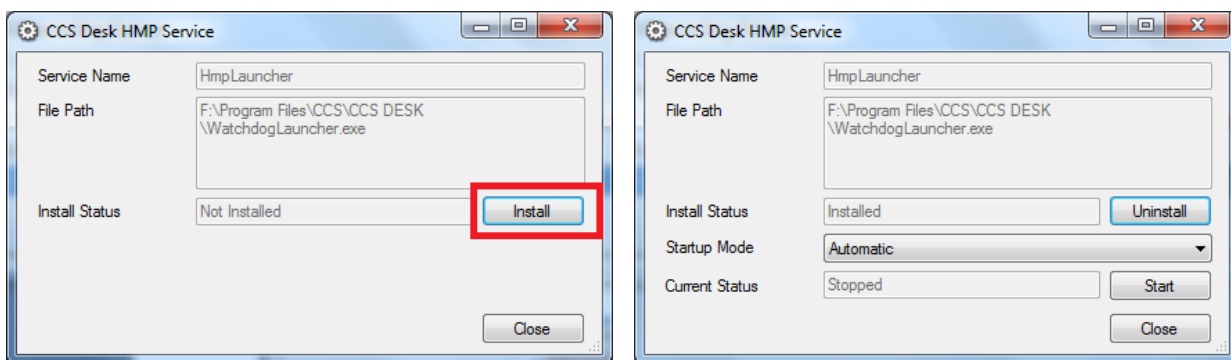
Step 1 – Launch **CCS Desk Manager** → Select **Options** → Select **Configure** → Go to the **Services** tab
→ Enable **Show Disabled Services**

Step 2 - **Right click** on **CCS Desk HMP Gateway** → Select **Configure Service** → Select **Install** →
Check the **Startup Mode** is set to **Automatic**. Do not start the service.

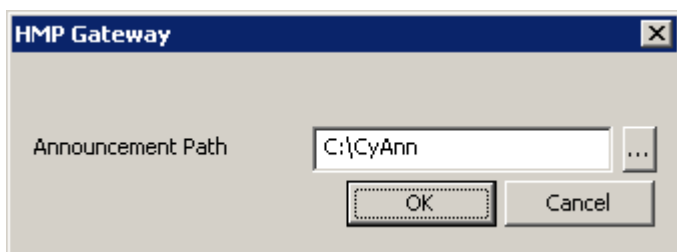
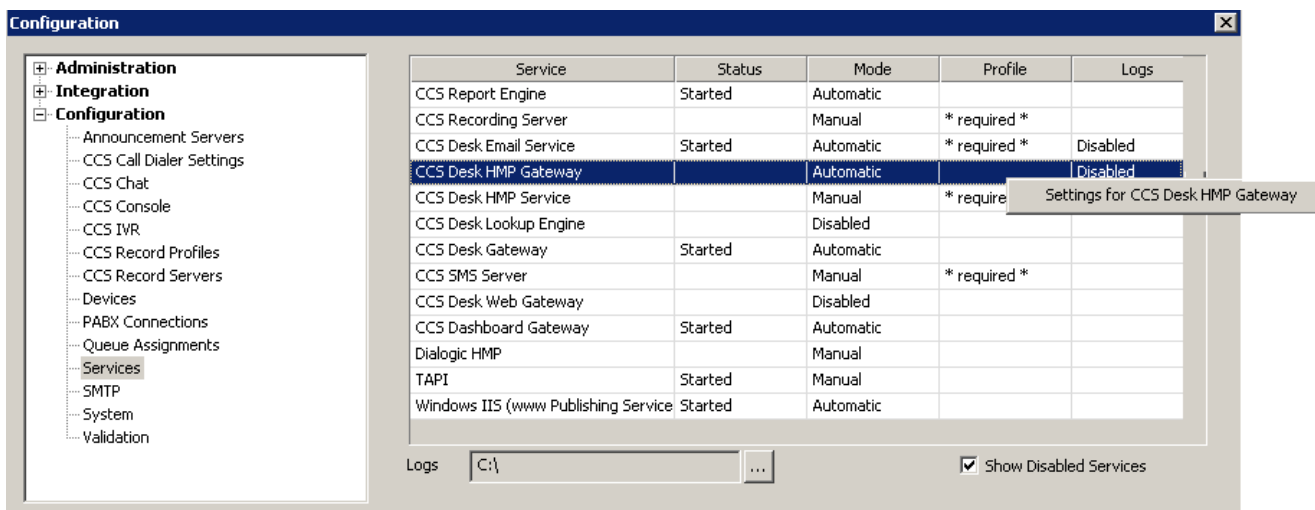


Step 3 - Right click on **CCS Desk HMP Service** → Select **Configure CCS Desk HMP Service** → Select **Install** → Check the **Startup Mode** is Automatic. Do not start the service.

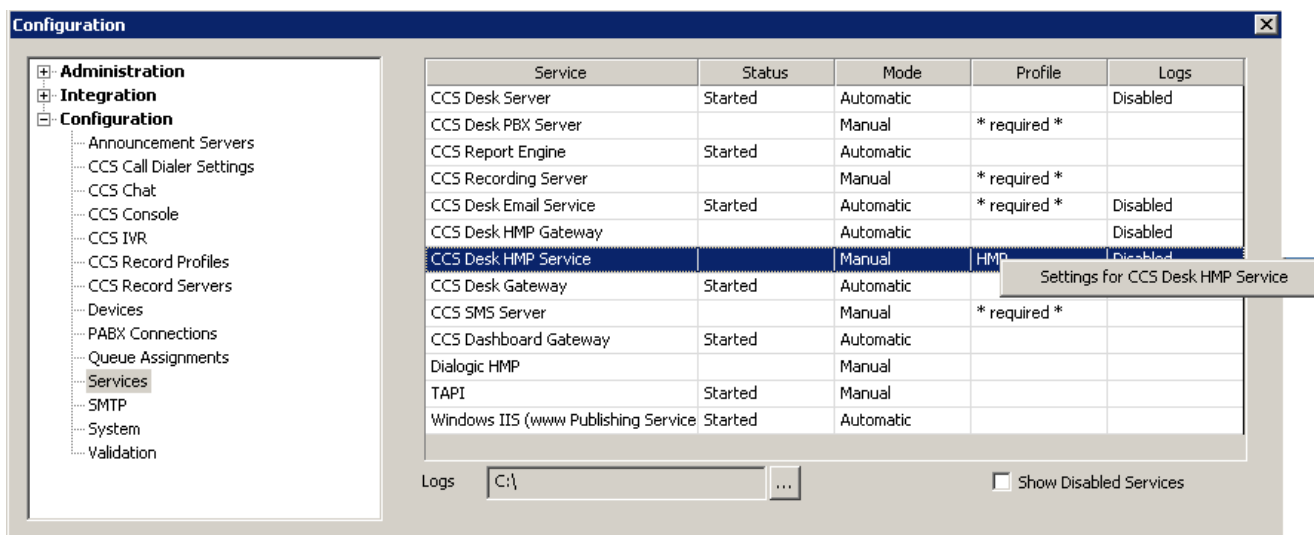




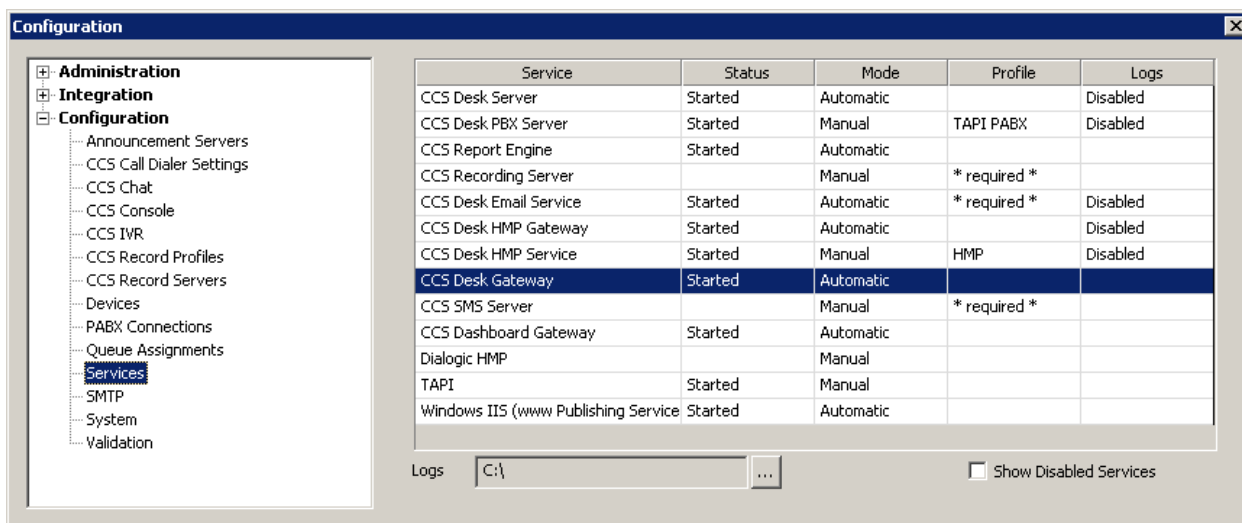
Step 4 - Right click on the Profile for **CCS Desk HMP Gateway** → Select **Settings for CCS Desk HMP Gateway**. Then set the Announcement Path and click **OK**



Step 5 - Right click on the Profile for **CCS Desk HMP Service** → Select **Settings for CCS Desk HMP Service**. Then select the Server and click **OK**.



Step 6 - Start **CCS Desk HMP Gateway** and **CCS Desk HMP Service**.



3.2.5 Announcement Files

Greeting files for each queue can easily be copied using Queue Announcements tab of CCS Desk Manager.

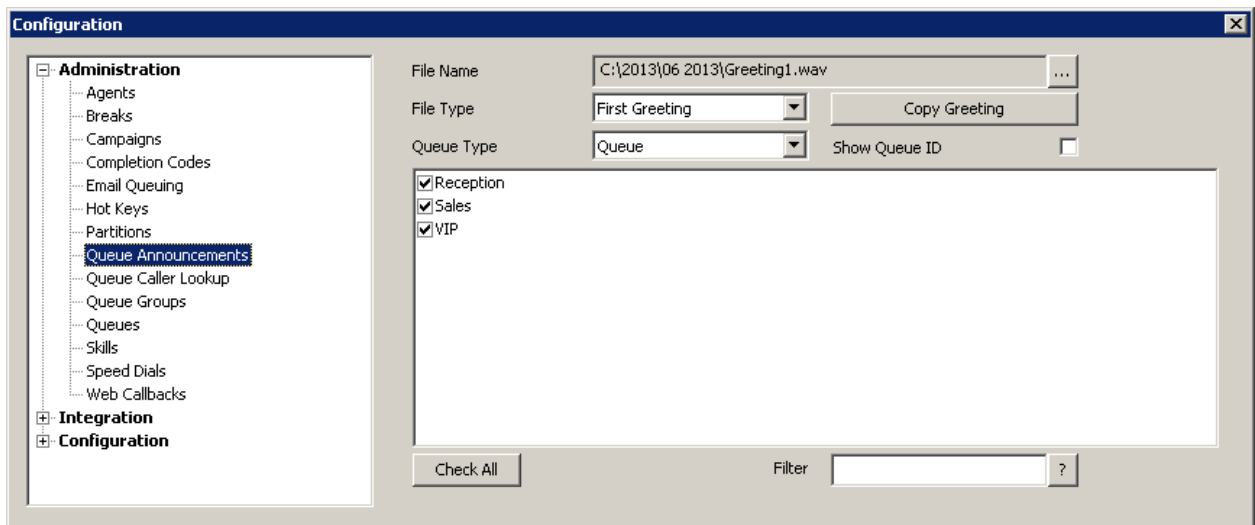
Step 1 – Launch **CCS Desk Manager** → Select **Options** → Select **Configure** → Go to the **Queue Announcement**

Step 2 - Select the **File** and the **Queue** to be copied into.

Step 3 - Select the **File Type** as applicable → Click **Copy Greeting**.

Note

Each inbound queue must at least have 'First Greeting' and 'Second Greeting' files.



-End of CCS Q Configuration-

4. iPECS CCS CALL INSTALL

4.1 Pre-Installation Requirements

The requirements for CCS Call are divided into three parts:

4.1.1 Installation of CCS Desk and CCS Report

4.1.2 Installation of Dialogic HMP (applicable only when pre-emptive mode is activated)

4.1.3 Telephony Requirements (applicable only when pre-emptive mode is activated)

4.1.1 Installation of CCS Desk and CCS Report

Before CCS Call can be configured, the installation of CCS Report and CCS Desk must be completed.

Please consult the Section 2 and CCS Report User Manual for more information.

4.1.2 Installation of Dialogic HMP

CCS Call does not require Dialogic HMP platform unless the pre-emptive dialer module is activated.

Please consult Section 5 for more information.

4.1.3 Telephony Requirements

There are additional telephony requirements and configurations that must be completed when using Dialogic HMP:

→ PBX must have sufficient 'SIP Phone' and 'CCS SIP' licenses.

If CCS Call is licensed with 4 ports, the number of licenses required for each category is 4.

→ SIP phones must be configured with the following settings (LGE iPECS)

- Registering mode = REGISTER
- Registration Timer Usage = ON
- Registration Time = 60
- DTMF = INFO (RELAY)

4.2 CCS Call Configuration (Preview / Progressive)

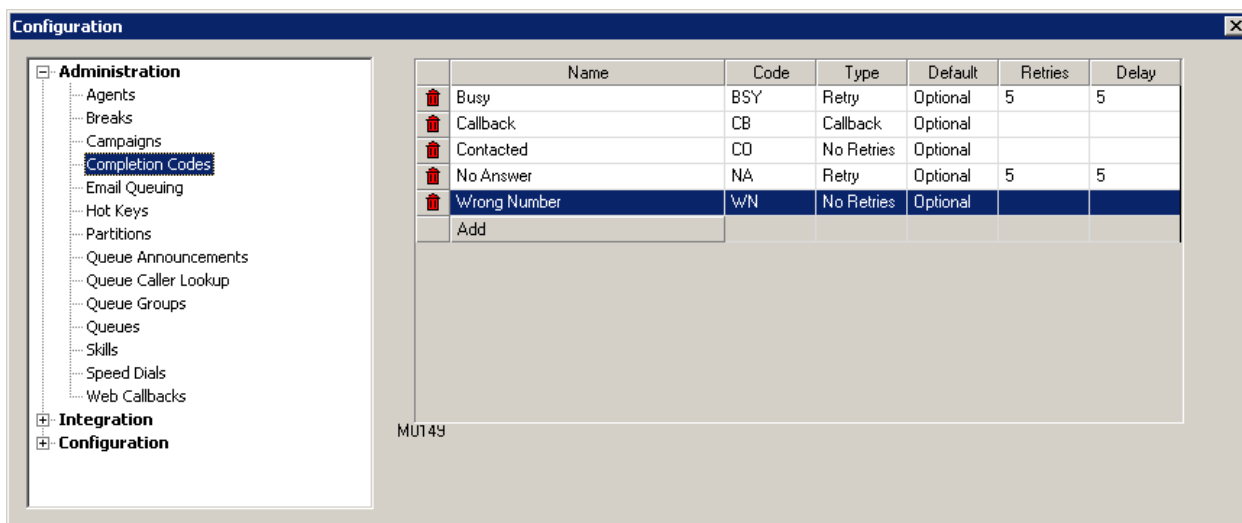
4.2.1 Completions

Step 1 - Open CCS Desk Manager → Select **Options** → Select **Configure** → Login to **CCS Desk Manager Configuration**

Step 2 - Go into the **Completion Codes** tab → Create all the necessary **completion codes** to be added into the campaigns.

Please consult Section 6.1.3.2 for detailed information on each setting.

Examples of typical completion codes for outbound dialing are shown with the screenshot below.



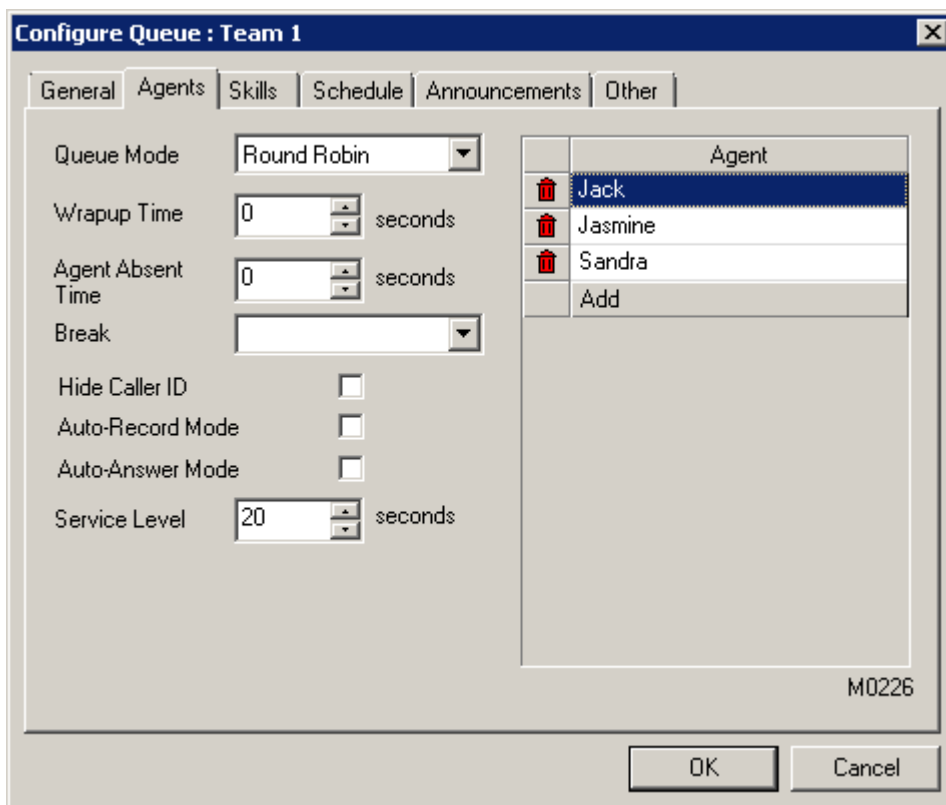
4.2.2 Queues

Step 1 - In **CCS Desk Manager Configuration** → Go into the **Queues** tab

Step 2 - Change **Queue Type** to **CCS Call Team** → Click **Add** to create one queue of this type.

Step 3 - **Double click** on the queue → Select the **Agents** tab → **Add** group of agents.

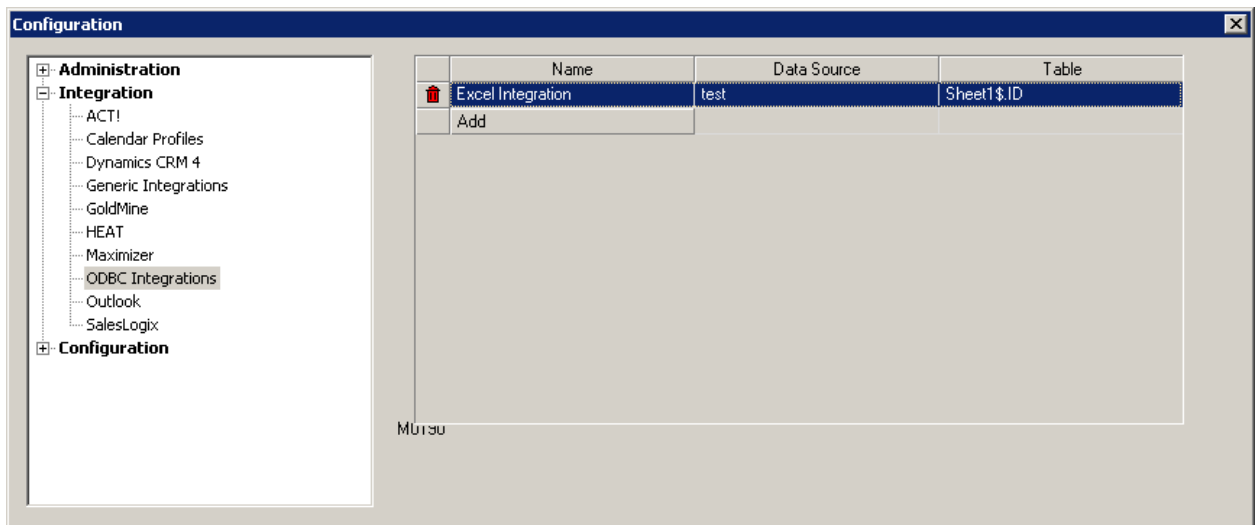
Please consult Section 6.1.11.2 for more information on each setting.



4.2.3 Integration Profiles

Campaign data records can be loaded into the campaign using one of the several integrations supported by CCS e.g. ODBC, SalesLogix, Dynamics CRM4, ACT!, or Generic.

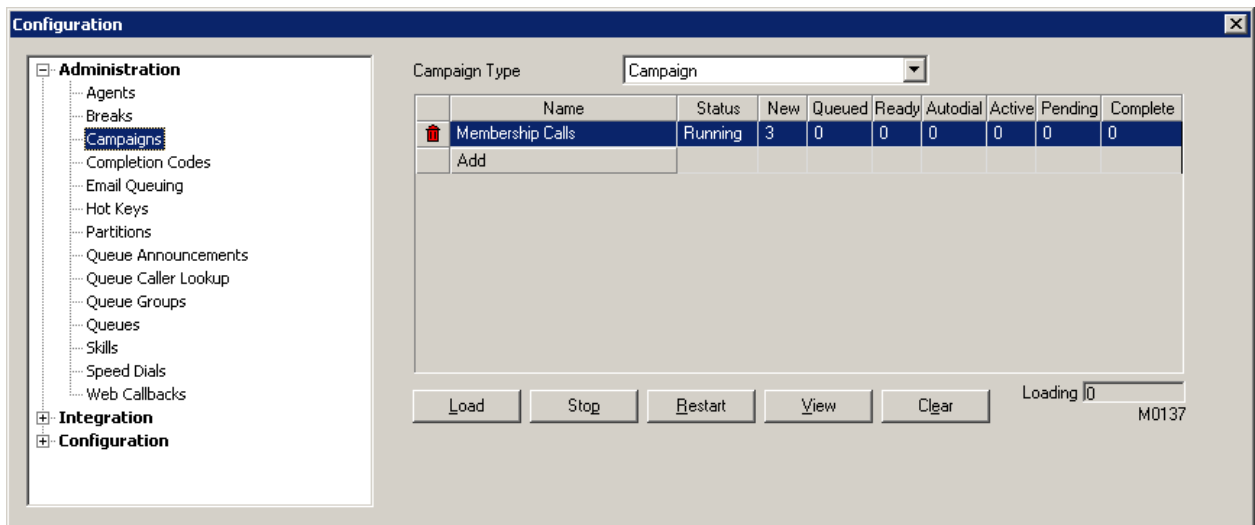
Integration profiles must first be configured in each respective tab. *Please consult Section 6.2.8 for detailed information on each setting.*



4.2.4 Campaigns

Step 1 - In **CCS Desk Manager Configuration** → Go into the **Campaigns** tab

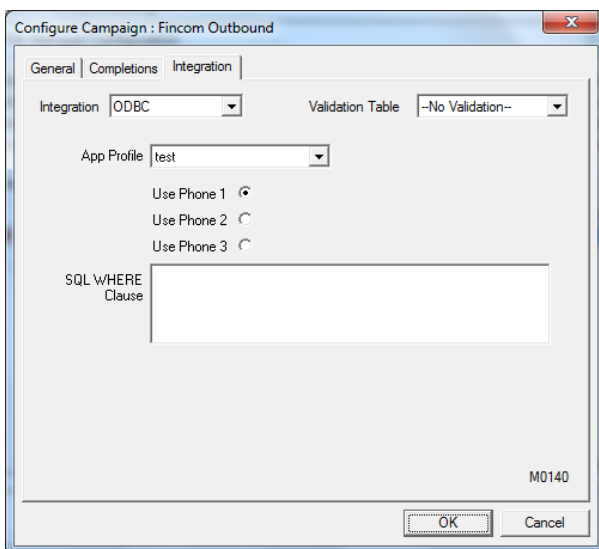
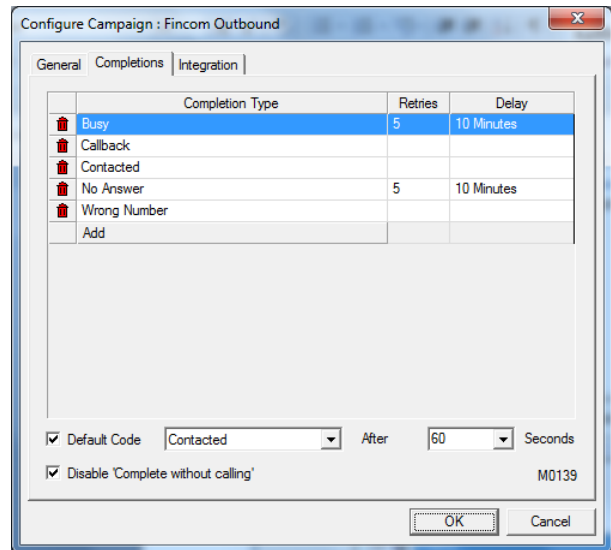
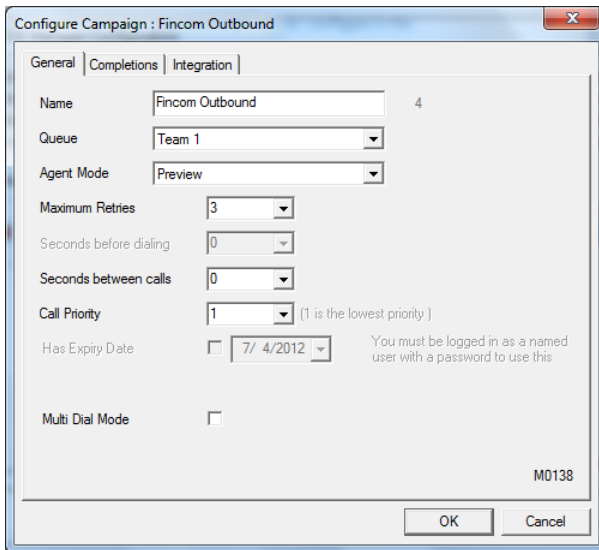
Step 2 - Change **Campaign Type** to **Campaign** → Click **Add** to create a campaign of this type.



Step 3 - **Double click** on the campaign → Configure the following settings:

- In **General** tab → Configure the **queue** and **agent mode**.
- In **Completions** tab → **Add** the completion codes
- In **Integrations** tab → Select the **integration type** and **data source** profile name.

Please consult Section 6.1.3 for more information on each setting.



-End of CCS Call Configuration (Preview / Progressive)-

4.3 CCS Call Configuration (Pre-emptive)

There are several additional configurations required when configuring pre-emptive campaign. The required settings are similar to CCS Q configurations.

We will assume the following configurations have been properly setup in the PBX and CCS license:

SIP devices for HMP= 101, 102, 103, 104

CCS Announcement port license = 4

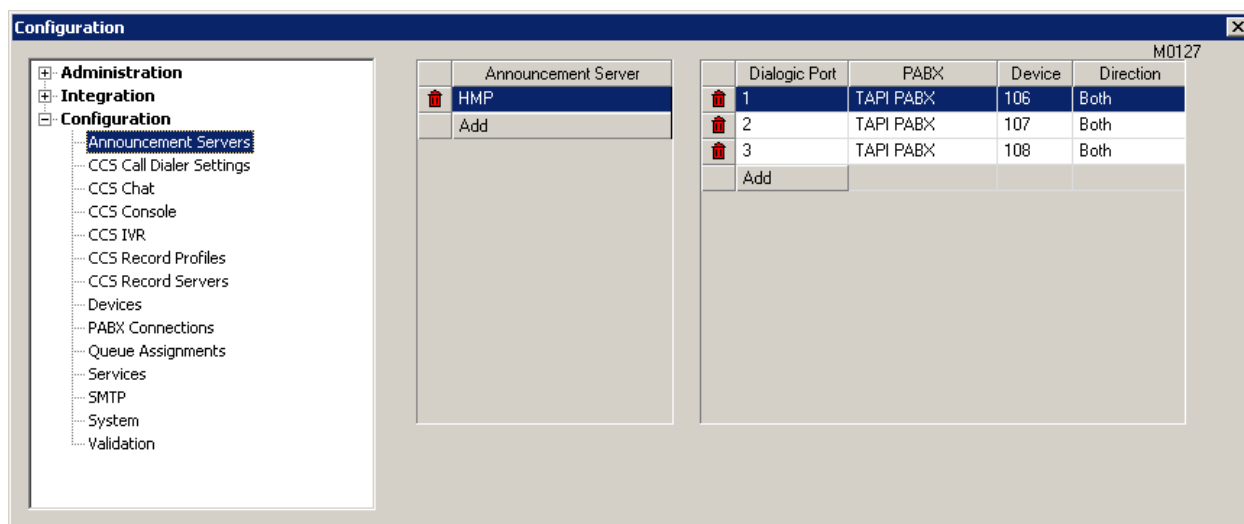
HMP licenses = 4

4.3.1 Announcement Server

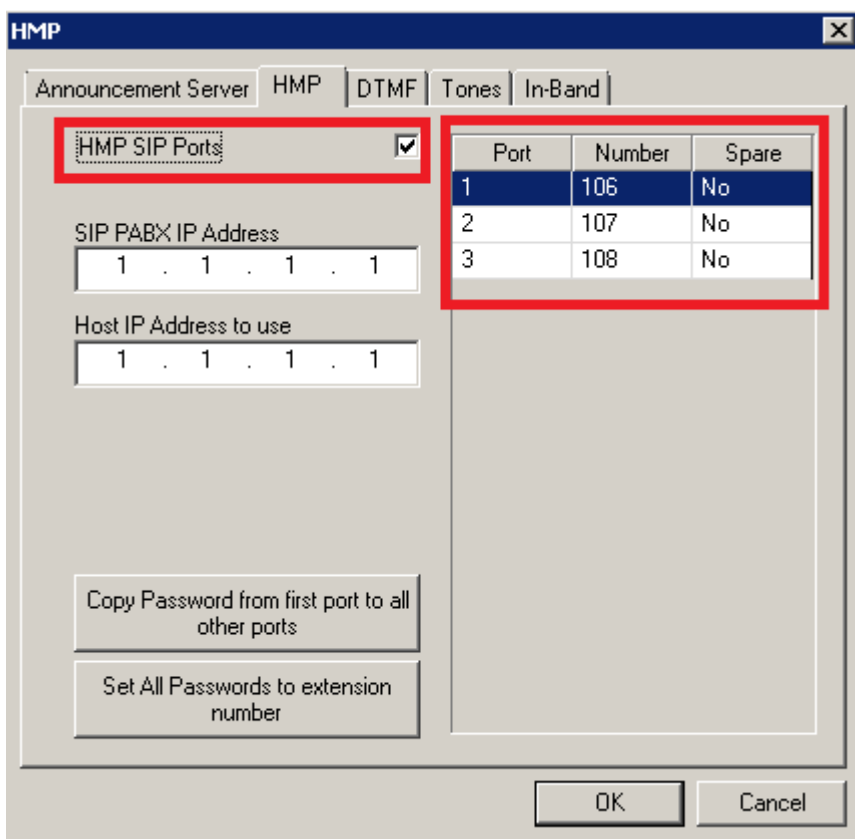
Step 1 - Open CCS Desk Manager → Select **Options** → Select **Configure** → Login to **CCS Desk Manager Configuration**

Step 2 - Go into the **Announcements** tab → Create an **Announcement Server profile** to integrate Dialogic HMP with the PBX.

Please consult Section 6.3.1 for detailed information on each setting.



Step 3 - **Double click** the Announcement Server to view the **Announcement Server Configuration** window



The important settings are highlighted:

- a) **HMP**
 - a. **HMP SIP Ports** must be **enabled**
 - b. **Requires Spare Channel** must remain **disabled**
 - c. Double click on each port and configure the SIP registration settings.

4.3.2 Queues

Step 1 - In **CCS Desk Manager Configuration** → Go into the **Queues** tab

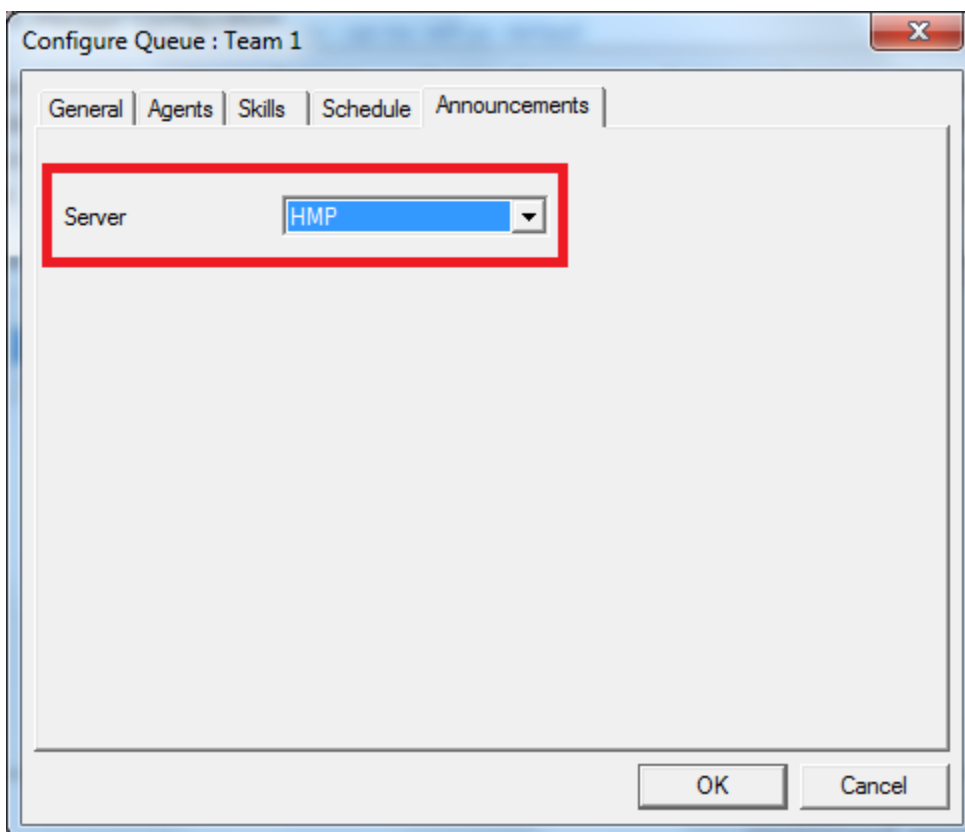
Step 2 - **Double click** on the campaign → Configure the following settings:

- In **General** tab → Configure the **queue** and **agent mode**.
- In **Completions** tab → **Add** the completion codes
- In **Integrations** tab → Select the **integration type** and **data source** profile name.

Please consult Section 6.1.11 for more information on each setting.

Step 3 - **Double click** on the queue → Select the **Agents** tab → **Add** group of agents.

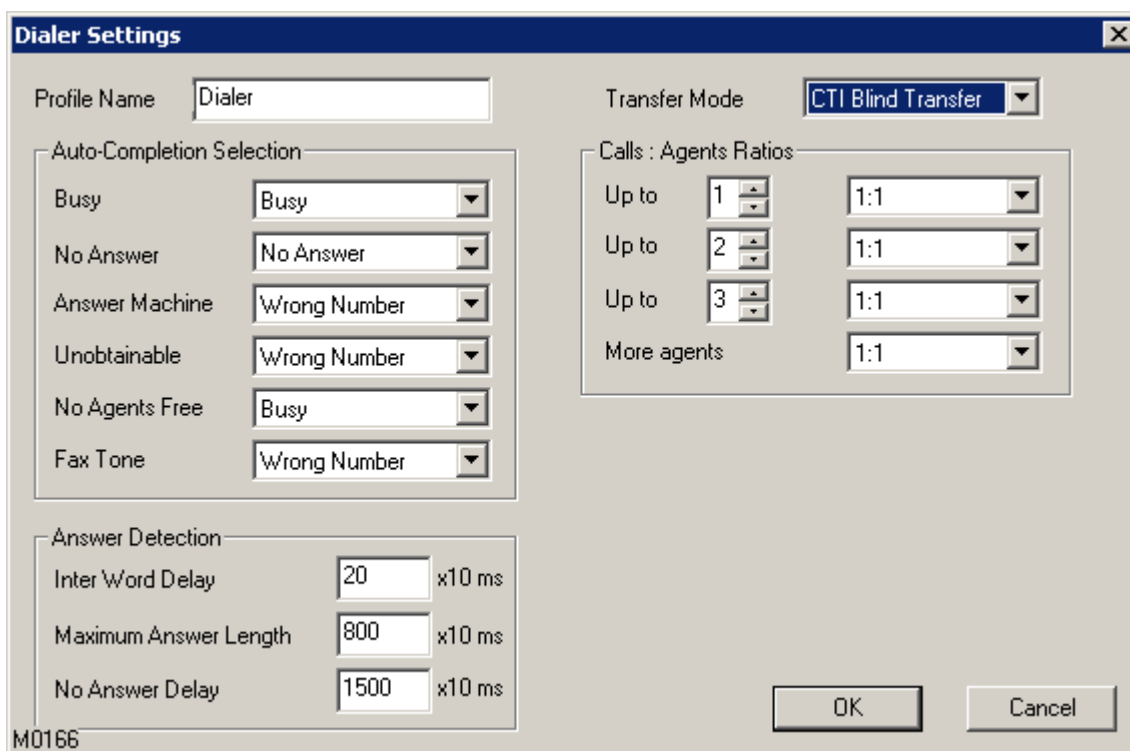
Step 4 - Click the **Announcements** tab → Select the **announcement server**.



4.3.3 CCS Call

Step 1 - In **CCS Desk Manager Configuration** → Go into the **CCS Call Dialer Settings** tab → Click **Add** to create a pre-emptive dialer profile.

Step 2 - **Double click** on the pre-emptive dialer profile → Configure the following settings:



- **Auto-Completion Selection** → Specify the **Completion Code** for each result.
- **Transfer Mode** → Select **CTI Blind Transfer**.
- **Call: Agents Ratios** → Specify the number of calls to be made per available agents.
- **Answer Detection** → The default settings will work fine.

Please consult Section 6.3.2 for more information on each setting.

4.3.4 Campaigns

Step 1 - In **CCS Desk Manager Configuration** → Go into the **Campaigns** tab.

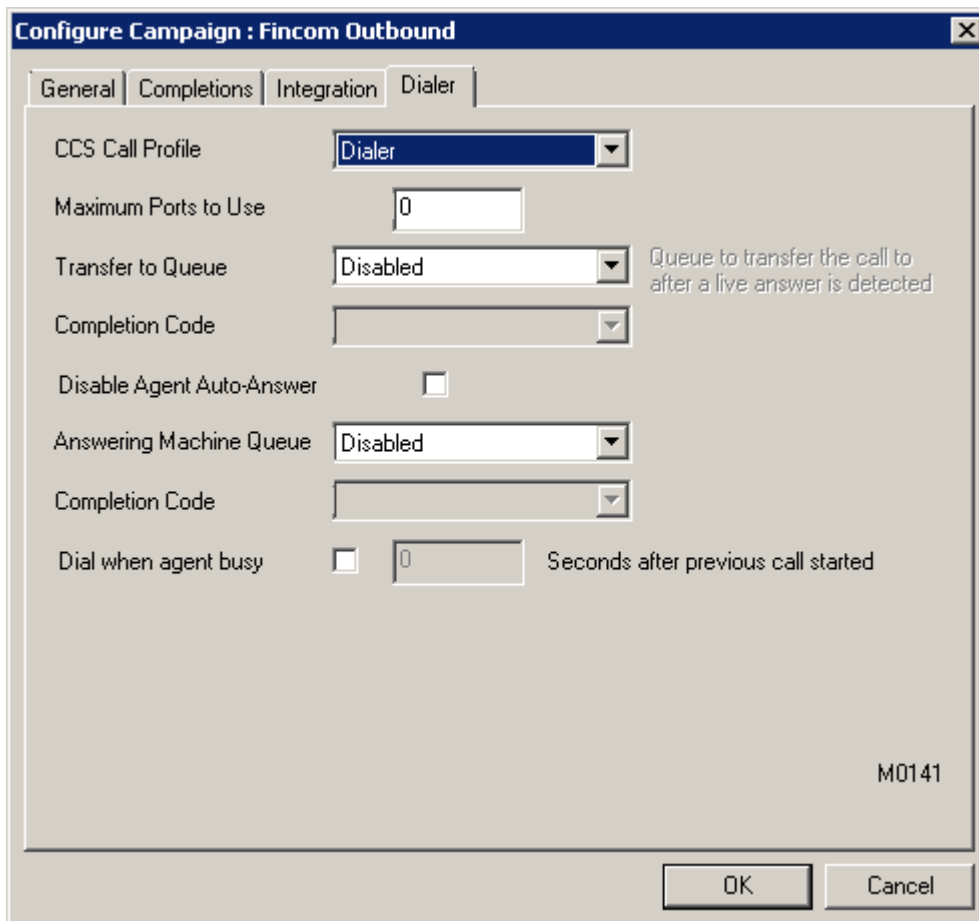
Step 2 - Change **Campaign Type** to **Pre-Emptive** → Click **Add** to create a campaign of this type.

Step 3 - **Double click** on the campaign → Configure the following settings:

- In **General** tab → Configure the **queue** and **agent mode**.
- In **Completions** tab → **Add** the completion codes

→ In **Integrations** tab → Select the **integration type** and **data source** profile name.

→ In **Dialer** tab → Select the **pre-emptive dialer** profile.



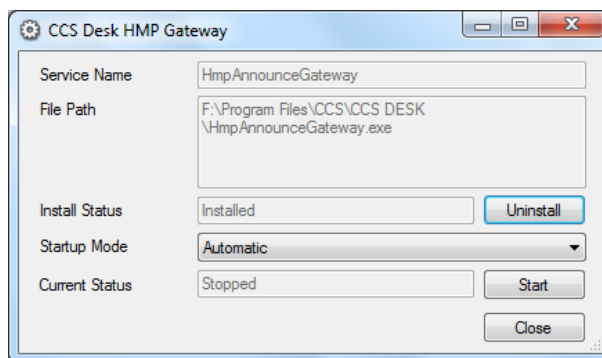
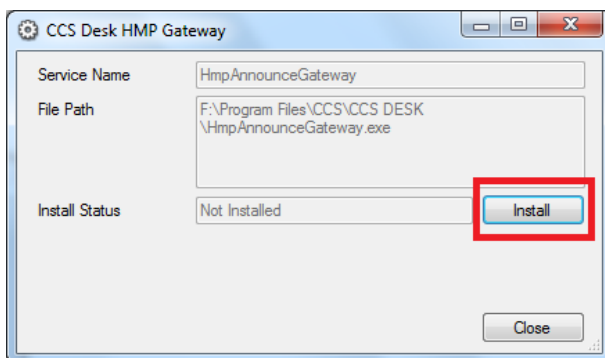
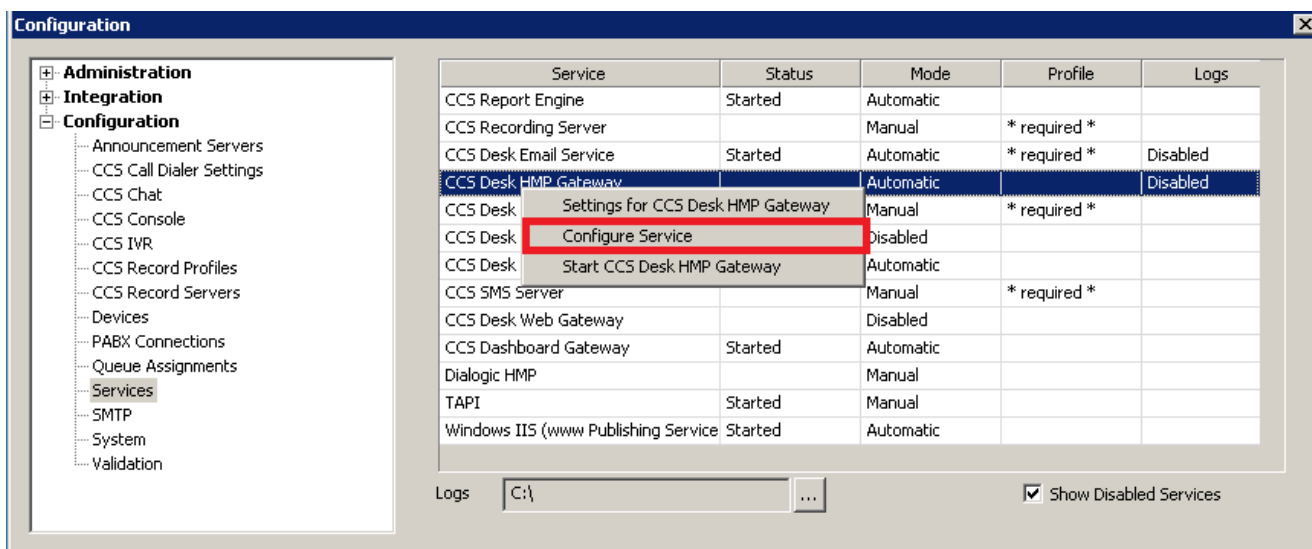
Please consult Section 6.1.3 for more information on each setting.

4.3.5 HMP Services

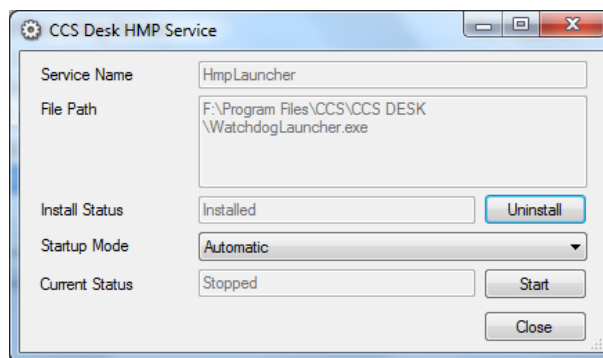
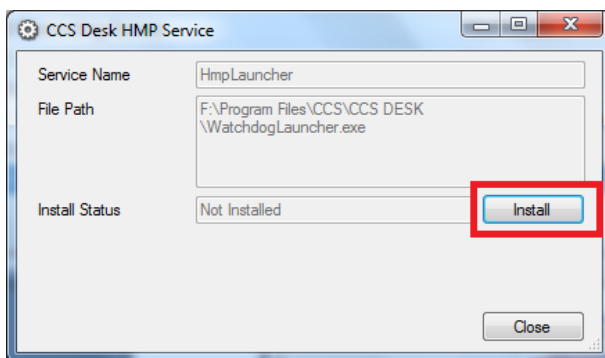
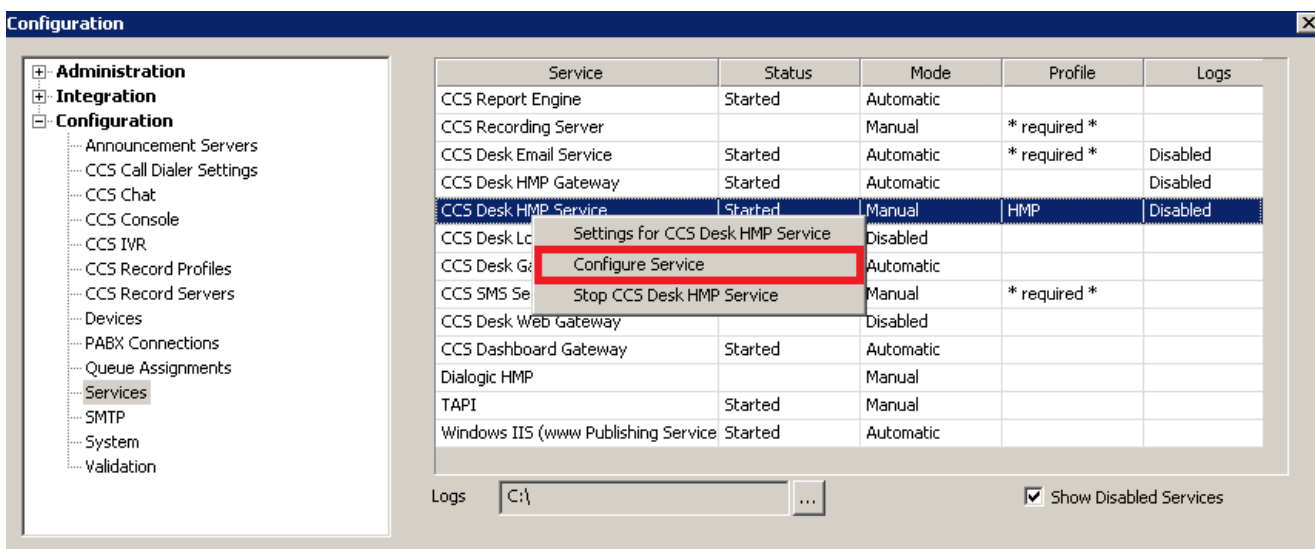
CCS Call with Dialogic HMP requires two additional services to be installed.

Step 1 – Launch **CCS Desk Manager** → Select **Options** → Select **Configure** → Go to the **Services** tab
→ Enable **Show Disabled Services**

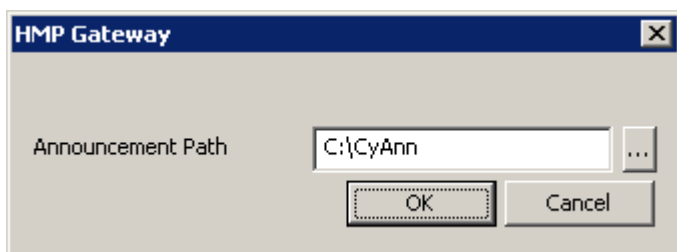
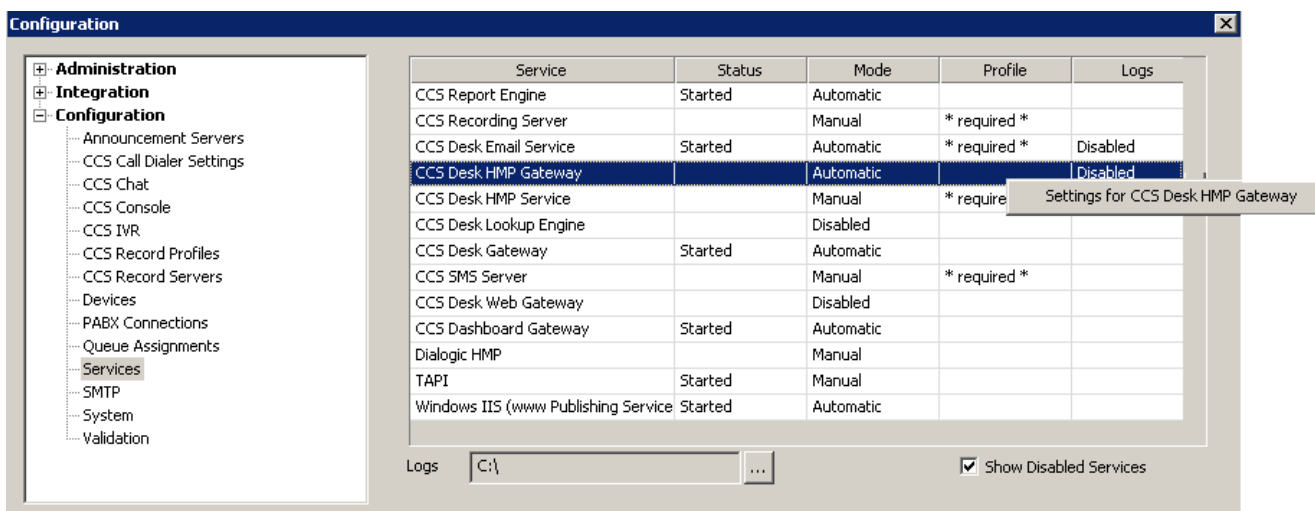
Step 2 - **Right click** on **CCS Desk HMP Gateway** → Select **Configure Service** → Select **Install** →
Check the **Startup Mode** is set to **Automatic**. Do not start the service.



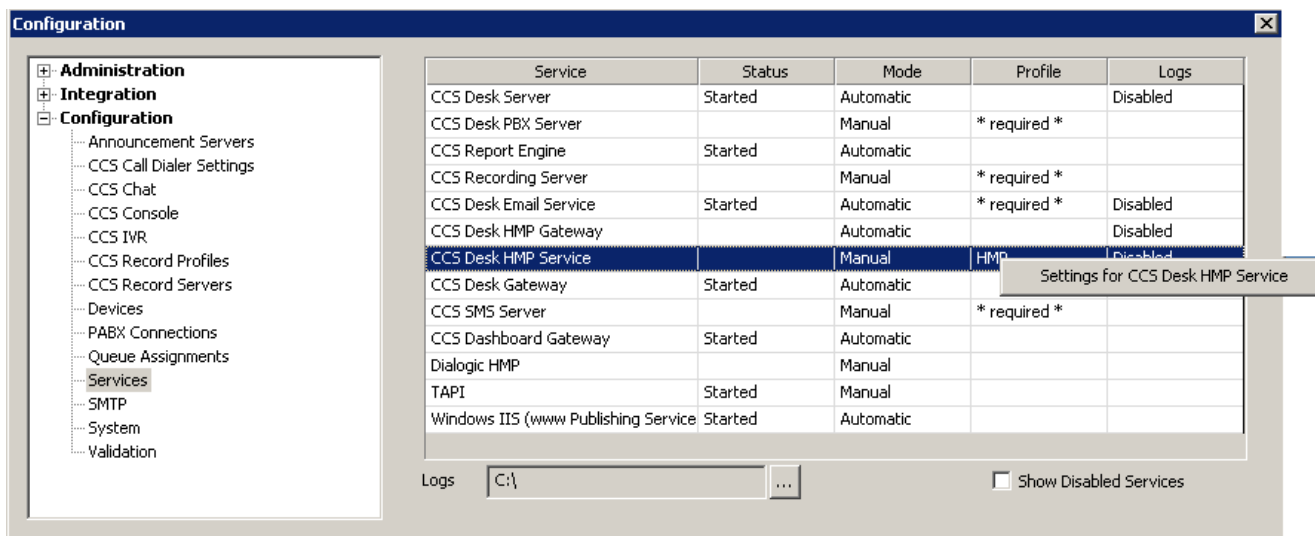
Step 3 - Right click on **CCS Desk HMP Service** → Select **Configure CCS Desk HMP Service** → Select **Install** → Check the **Startup Mode** is Automatic. Do not start the service.



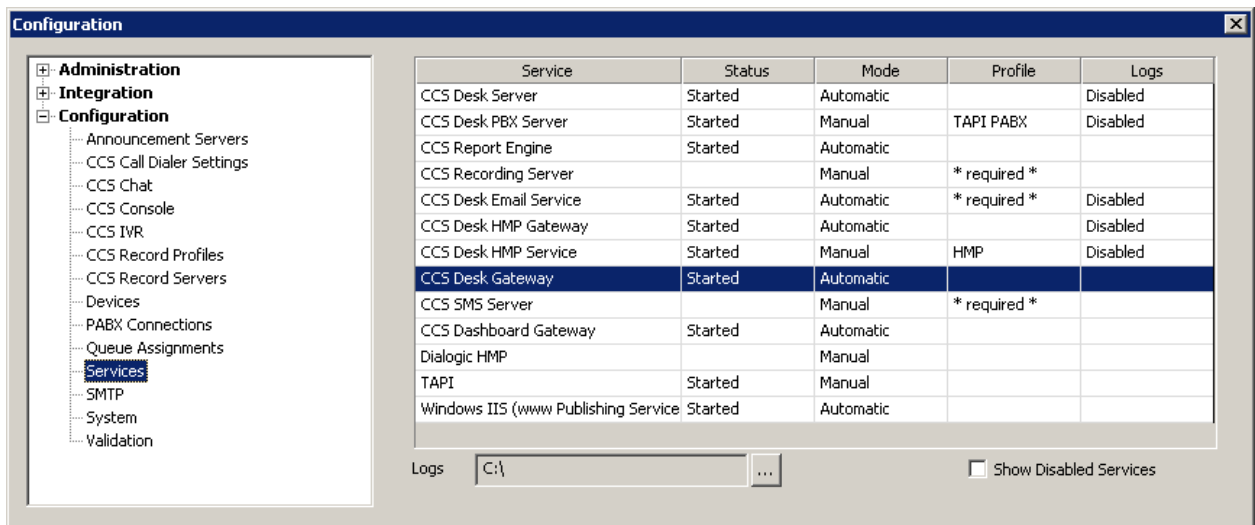
Step 4 - Right click on the Profile for **CCS Desk HMP Gateway** → Select **Settings for CCS Desk HMP Gateway**. Then set the Announcement Path and click **OK**



Step 5 - Right click on the Profile for **CCS Desk HMP Service** → Select **Settings for CCS Desk HMP Service**. Then select the Server and click **OK**.



Step 6 - Start **CCS Desk HMP Gateway** and **CCS Desk HMP Service**.



-END of CCS Call Configuration (Pre-emptive)-

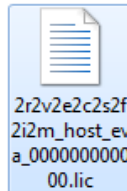
Note

Please consult Section 12 for additional setup guide to CCS Call.

5. iPECS CCS DIALOGIC HMP INSTALL

5.1 HMP License

HMP is licensed and deployed in customized "packages" of call control and media processing resources. The license is a .lic file that must be obtained from the web by registering the MAC address of the primary network card on the server.



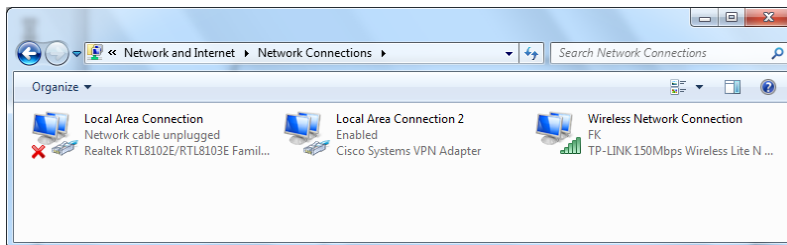
IMPORTANT:

Each license file will be locked against the MAC address of the machine's primary network card. This NIC hardware must remain enabled, even when it is not used i.e. cable is disconnected.

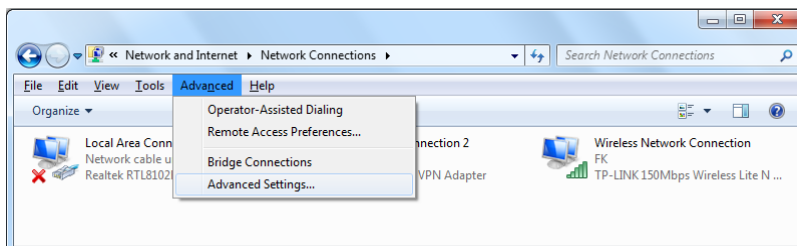
The primary network card must also be the network card that communicates with the PBX.

Follow the steps below to check the order of the network cards.

Step 1 - Open Window's **Control Panel** → Open **Network and Sharing Center** → Select **Change Adapter Settings**.

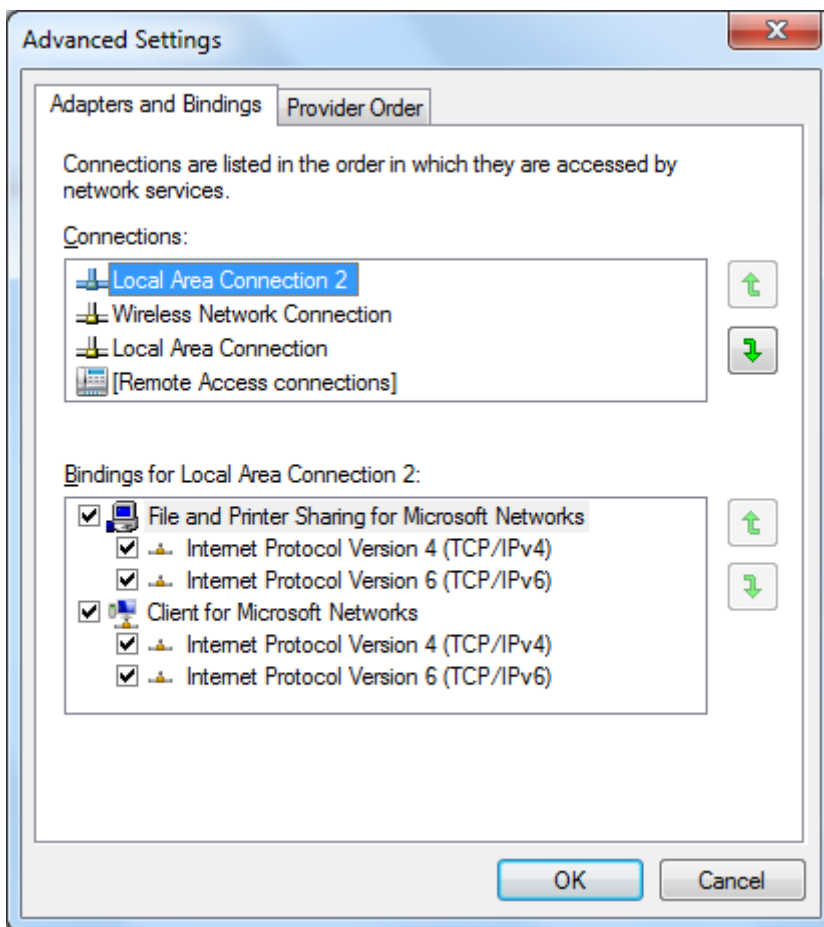


Step 2 - Press the **ALT** key to open additional menus in this screen. Select **Advanced** → **Advanced Settings...**



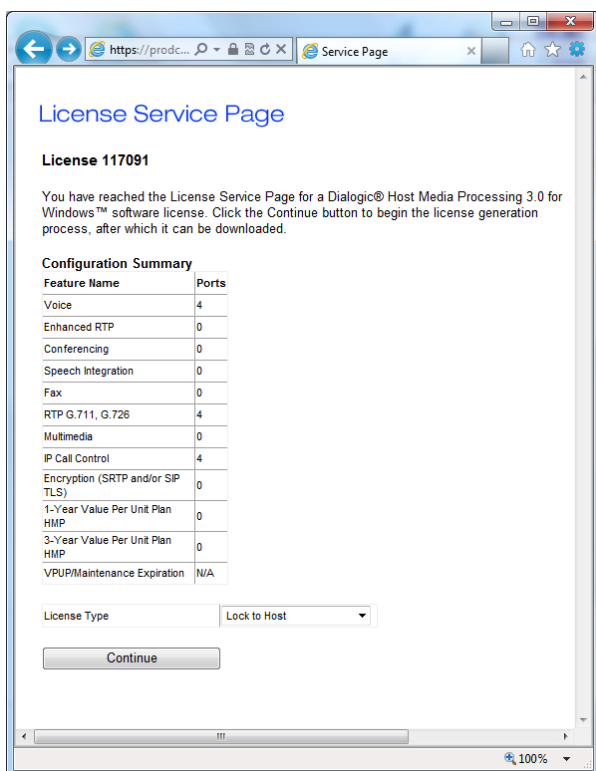
Step 3 - The primary network card is the one listed at the top of the '**Connections**' list.

→ Use the arrow buttons to move the network card that is connected to the PBX to the top of the list.

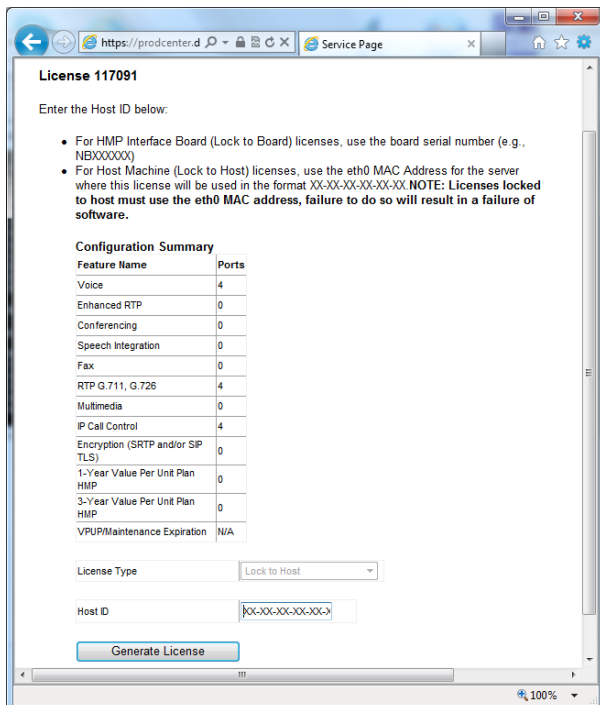


Step 4 - **Reboot** the server once you have made the changes.

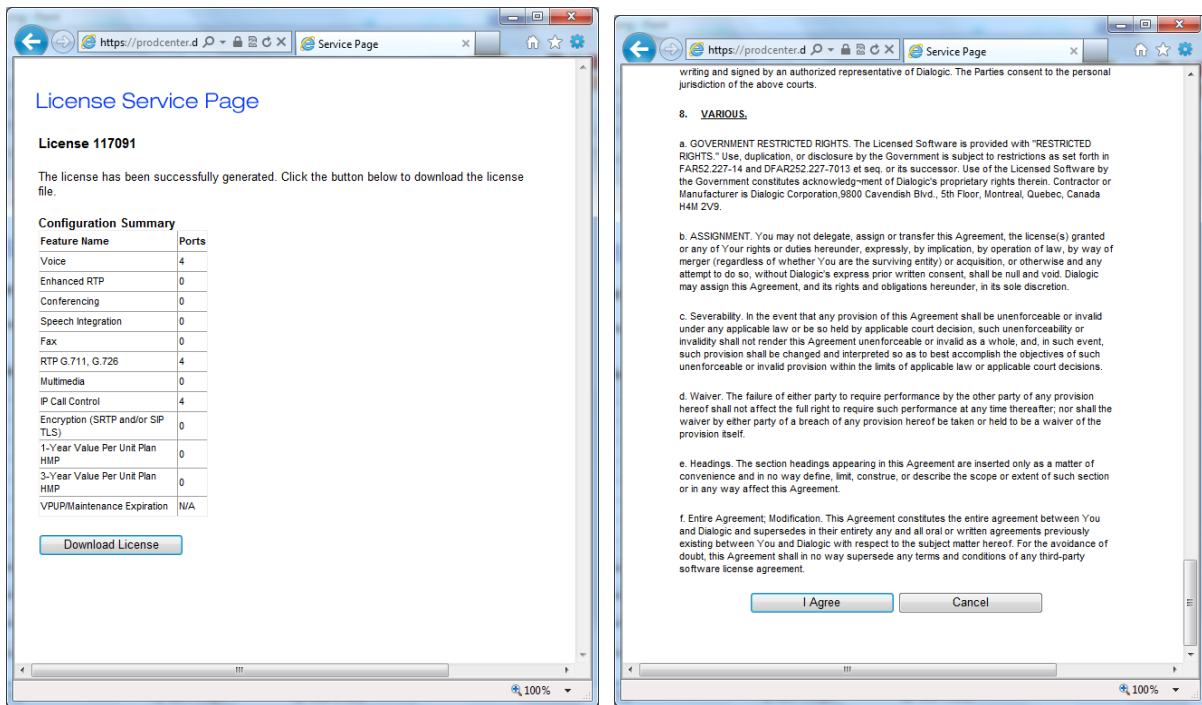
Step 5 - Once you log back in to server, open the provided **HMP license hyperlink** → Select '**Lock to Host**' license type → Click on the '**Continue**' button.



Step 6 - Fill 'Host ID' with the MAC address of the primary network card → Click 'Generate License'.



Step 7 - Click on the 'Download' button → Click on the 'I Agree' button to obtain the license file.

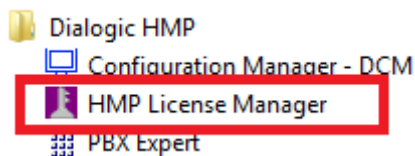


5.2 Install HMP

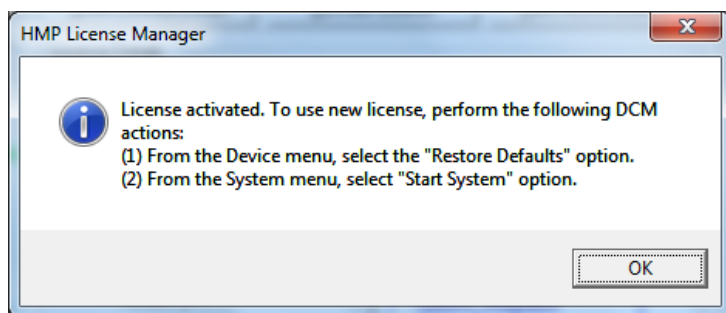
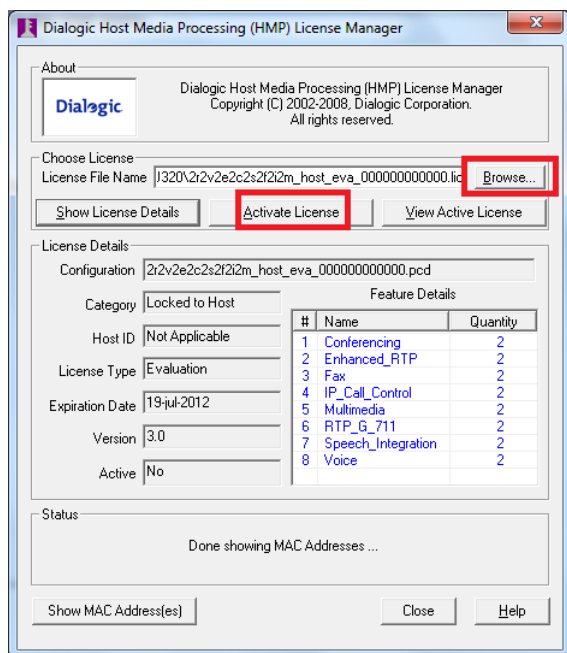
HMP is automatically installed during the CCS Desk 'Server' installation. Please consult Section 2 for more information.

5.3 Activate HMP License

Step 1 - Open the **HMP License Manager** from the Start Menu.



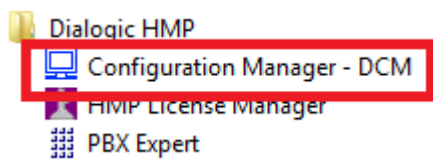
Step 2 - **Browse** and locate the HMP license file → Click on **Activate License** and wait for the confirmation message.



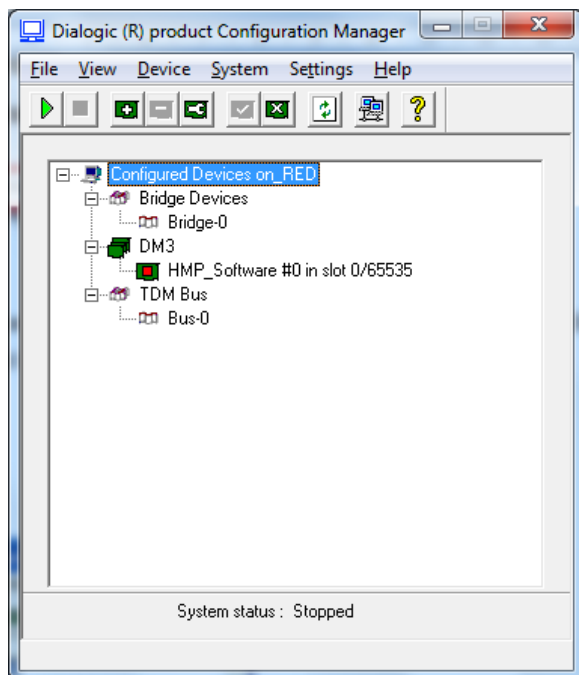
Step 3 - Select **OK** → **Close** the HMP License Manager.

5.4 Activate HMP

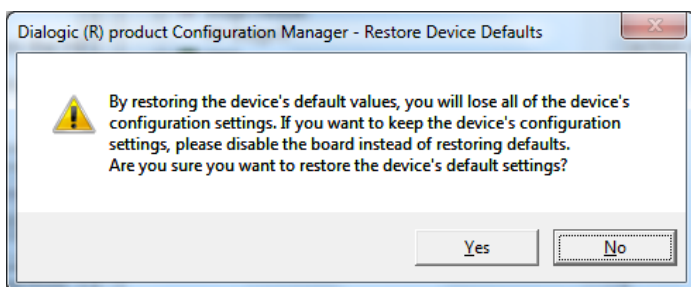
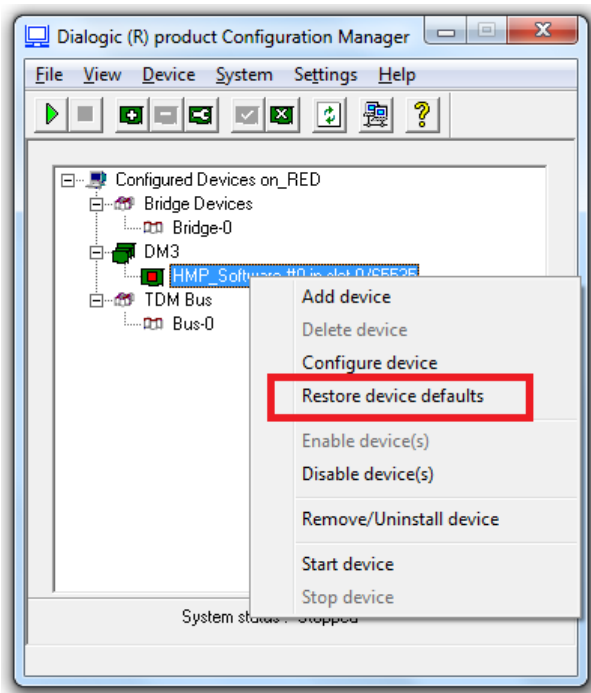
Step 1 - Open the **Dialogic HMP Configuration Manager** from the Start Menu.



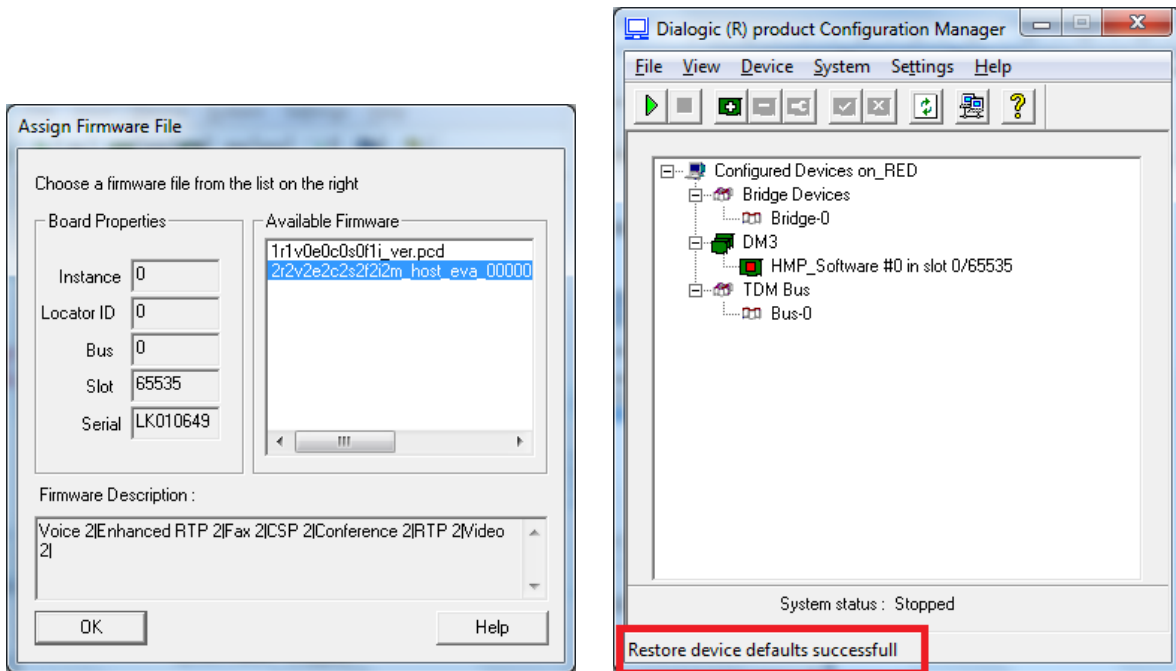
The Configuration Manager will show the installed HMP 'device' on the server. By default the System status is Stopped and indicated as well by the Red circle on the HMP icon.



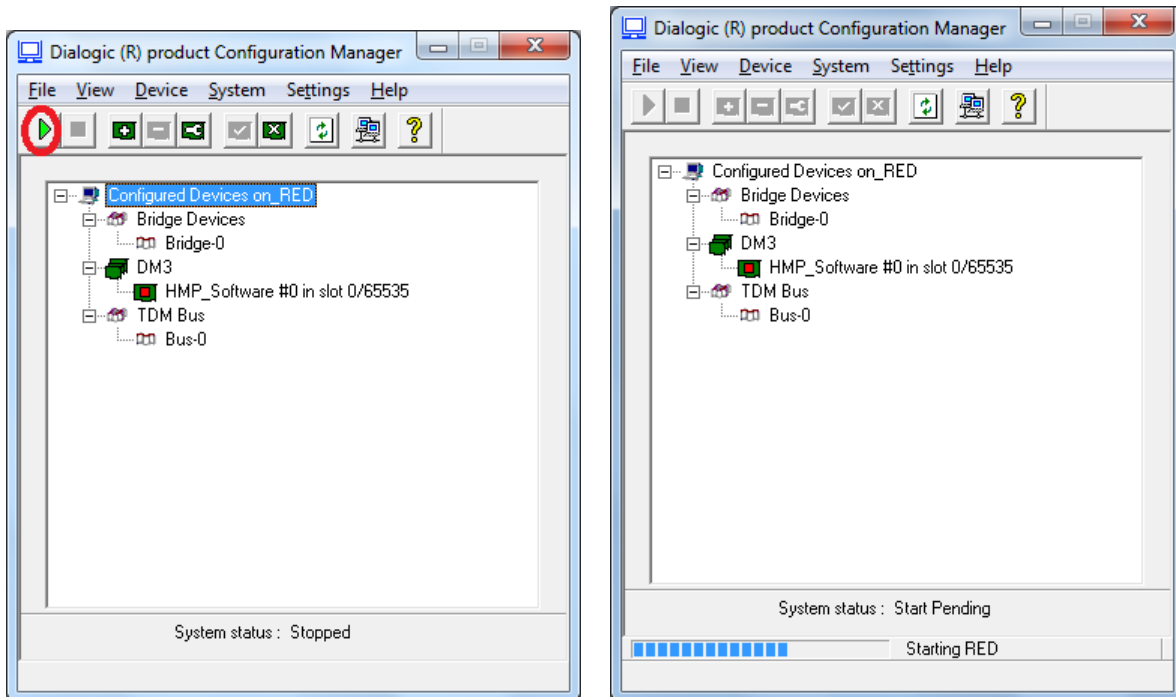
Step 2 - **Right click** on HMP → Select **Restore Device Defaults** → Select **Yes** on the next warning. This is a required action every time a new license is activated.



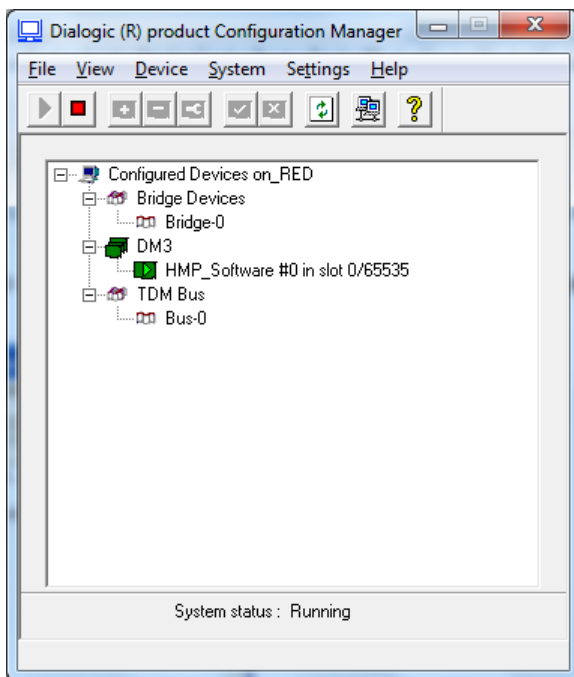
Step 3 - Choose the correct license file from the **Available Firmware** list → Click **OK**. The Configuration Manager will advise that the Restore process is successful.



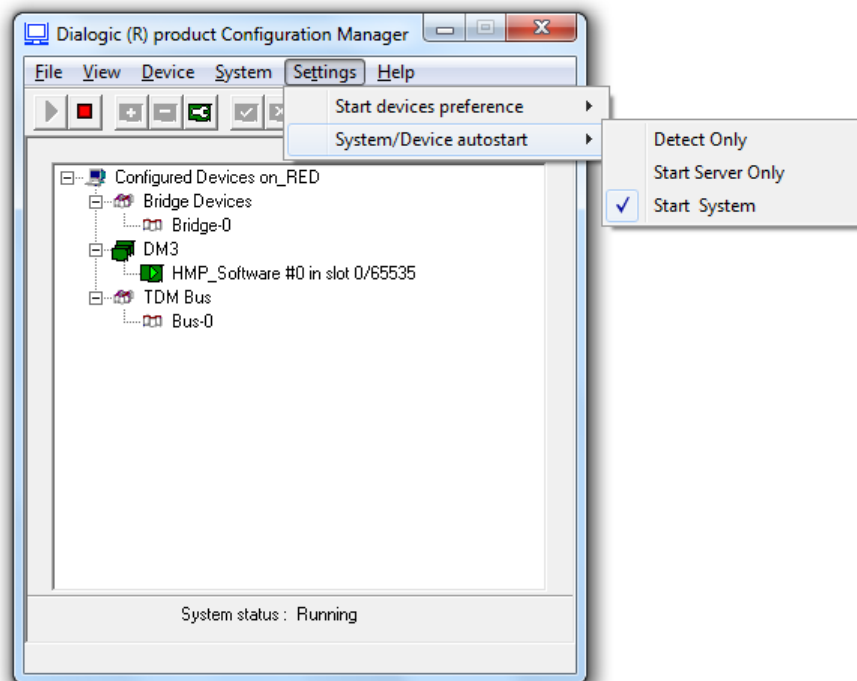
Step 4 - Click on the **Start** button to start the system.



When the system has successfully started, the red icon on the board will change to a green triangle.

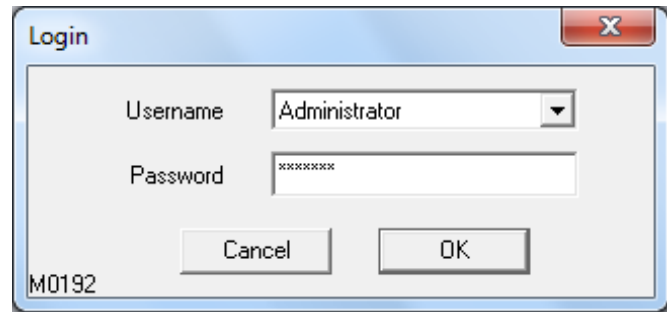
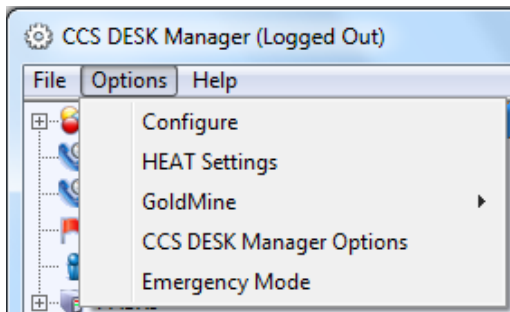


Step 5 - Click **Settings** → Select **System/Device autostart** → select **Start System**.
This ensures that the HMP will run automatically when the machine is rebooted.



6. Configuring CCS Desk

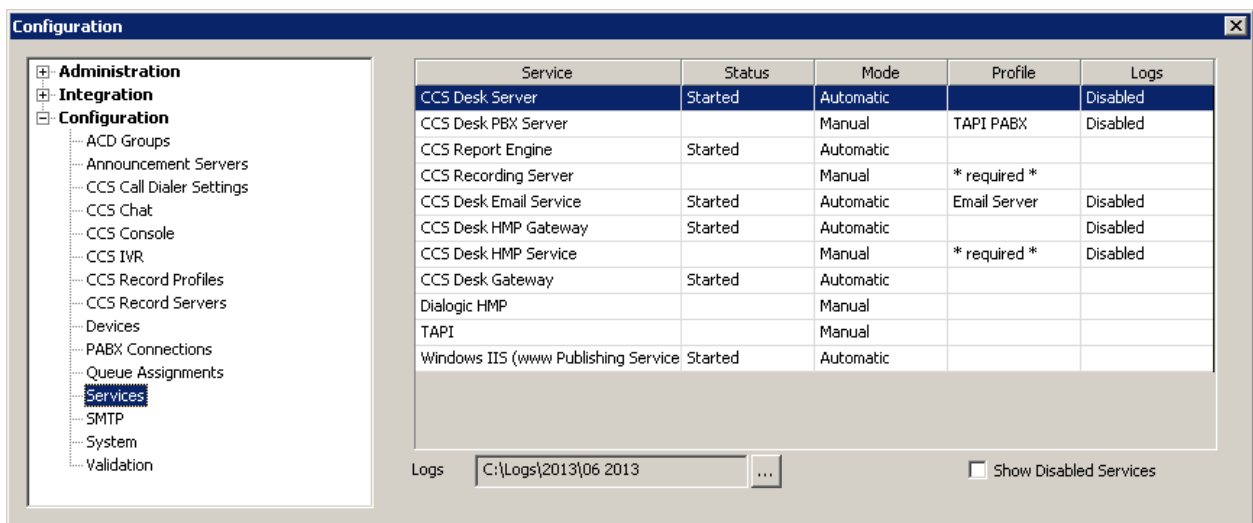
CCS Desk Manager allows administrators to configure system settings in real-time. To access the configuration screen, click on 'Options' and select 'Configure'. You will be required to login as a CCS Desk user with administrator privileges.



The configuration area is divided into multiple tabs which will be described in the next sections. Some tabs may not be available on your system due to insufficient software license.

The Main Tree Configuration is divided into three major sections:

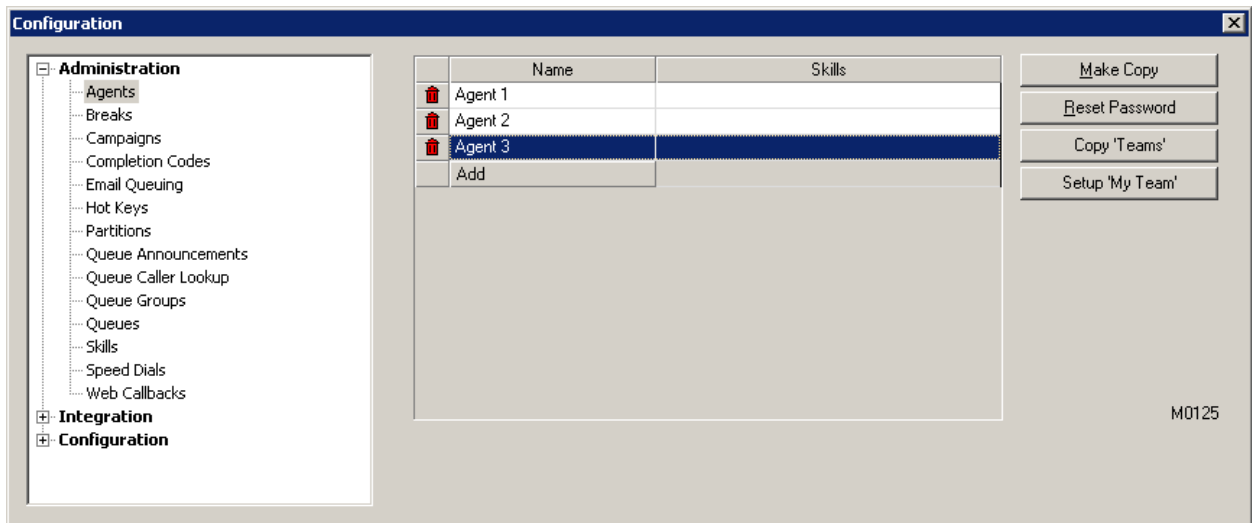
- Administration
- Integration
- Configuration



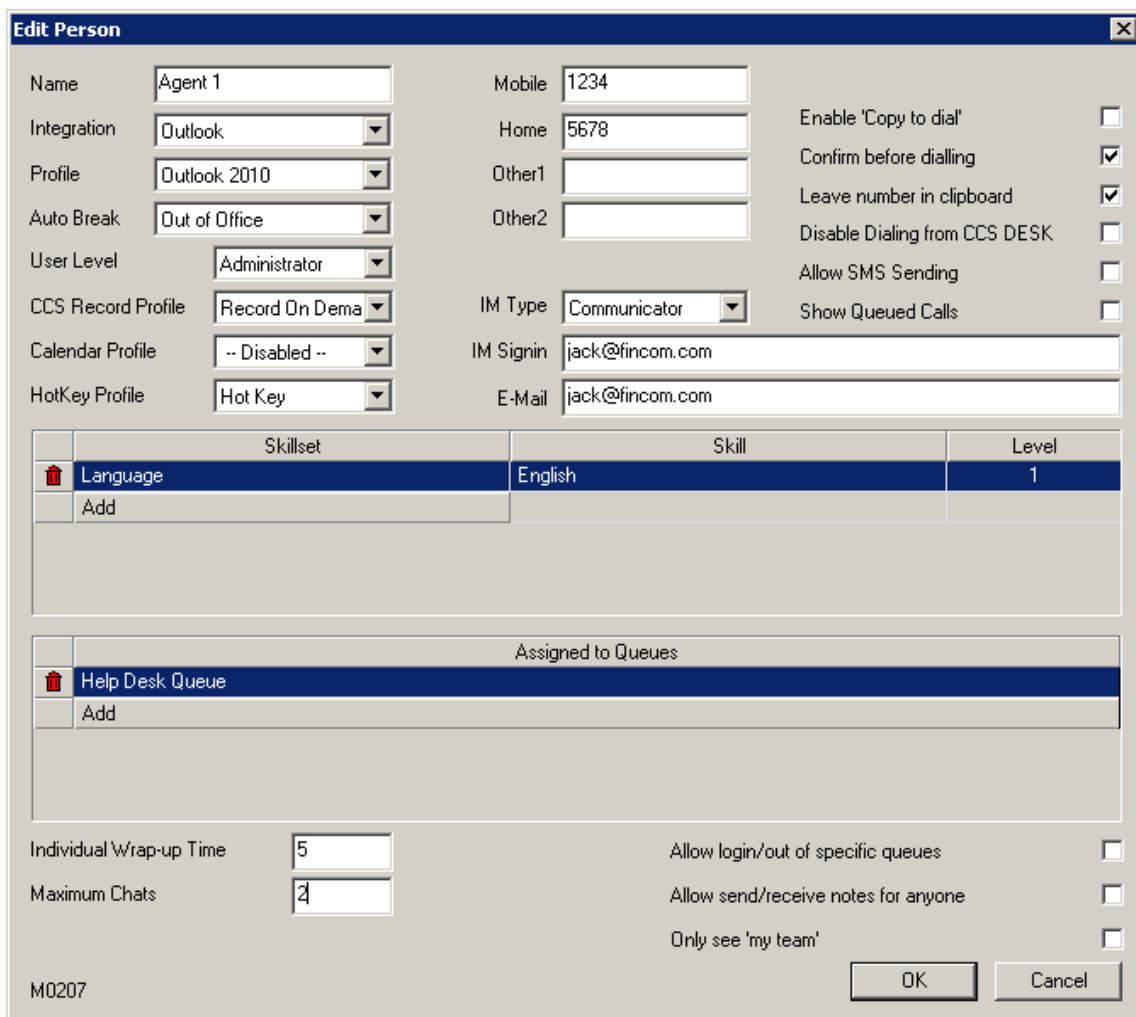
6.1 Administration

6.1.1 Agents

The Agents tab maintains the list of usernames for CCS Desk. A new agent profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



By default the list is sorted by agent names in alphabetical order. You can change the sort method of this list by double clicking on the column names.



Name – The CCS Desk username.

Integration – The CRM / database application that CCS Desk will integrate with for this user.

Profile – The integration profile, according to the Integration mode selected.

Auto Break – CCS Desk will be placed on this break when the screensaver becomes active.

User Level – Controls the security and feature accessibility for each CCS Desk agents.

- **Standard User** – for agents. No access to configuration or monitoring with CCS Desk Manager. Unable to manage CCS conference rooms, silent monitor, Send Notes or change other users' status.
- **Supervisor** – for team leaders. Able to Send Notes or change other user's status. Full access to CCS Desk Manager monitoring features, but access to the configuration area is not allowed.
- **Administrator** – full access.

CCS Record Profile – agent recording profiles. The profile is configured in the CCS Record tab.

Calendar Profile – provides presence information by integrating a calendar application to CCS Desk. The profile is configured in the Calendar tab

Hotkey Profile – the keyboard shortcut profile enabled / disabled for the agent. The profile is configured in the Hotkeys tab.

Mobile – Can be used to store the mobile phone number of the agent.

Home – Can be used to store the home phone number of the agent.

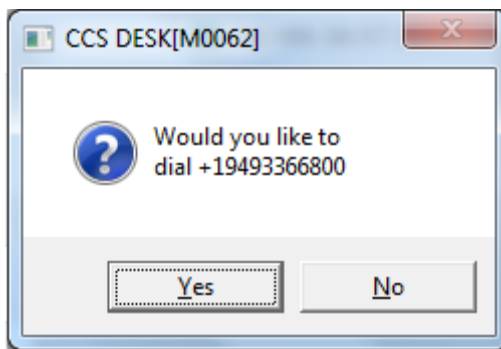
Other1 – An alternative phone number the agent may be contacted on.

Other2 – A second alternative phone number the agent may be contacted on.

IM Type – The Instant Messaging application to integrate with. Currently supported options are Windows Messenger or Office Communicator.

IM Signin - The email address entered here is used to identify the agent into the IM application.

Enable 'Copy to Dial' – When phone number is highlighted with the mouse then copied a screen will be displayed asking if you wish to dial that number.



Confirm Before Dialling – Prompts for confirmation before dialling.

Leave Number in Clipboard – Leaves the number in the clipboard so it can be copied as a speed dial for future use.

Disable Manual Numbers – Disables the manual dialling of numbers using the 'Dial Another Number' option within CCS Desk.

Allow SMS Sending – If this checkbox is enabled, the user will be allowed to send SMS via the CCS SMS module. This requires a subscription to the CCS SMS service.

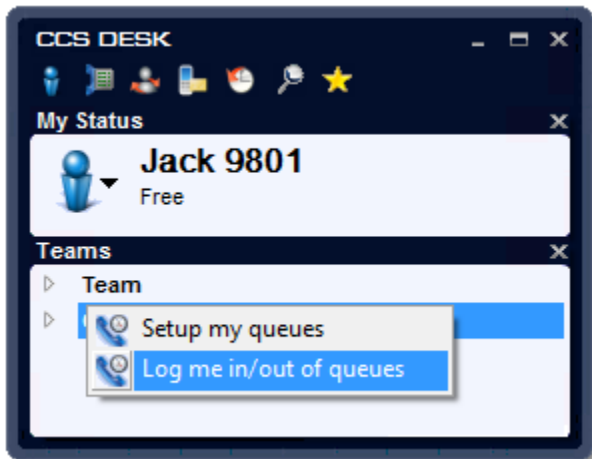
Show Queued Calls – Allows the user to see calls waiting in their queues. This is useful for monitoring the queues, particularly for supervisors to be able to route those calls to other places.

Skill Set – This option allows skill sets and skill levels to be added to the agent, with level 1 (beginner) to 5 (expert).

Queues – This list the queues the agent is assigned to.

Individual Wrap-up Time – custom wrap-up timer for each agent. Wrap-up is activated at the end of each call and overrides any wrap-up configuration in queues or completion codes.

Allow login/out of specific queues – when this option is enabled, agents can choose to add / remove themselves from queues that they are assigned to.



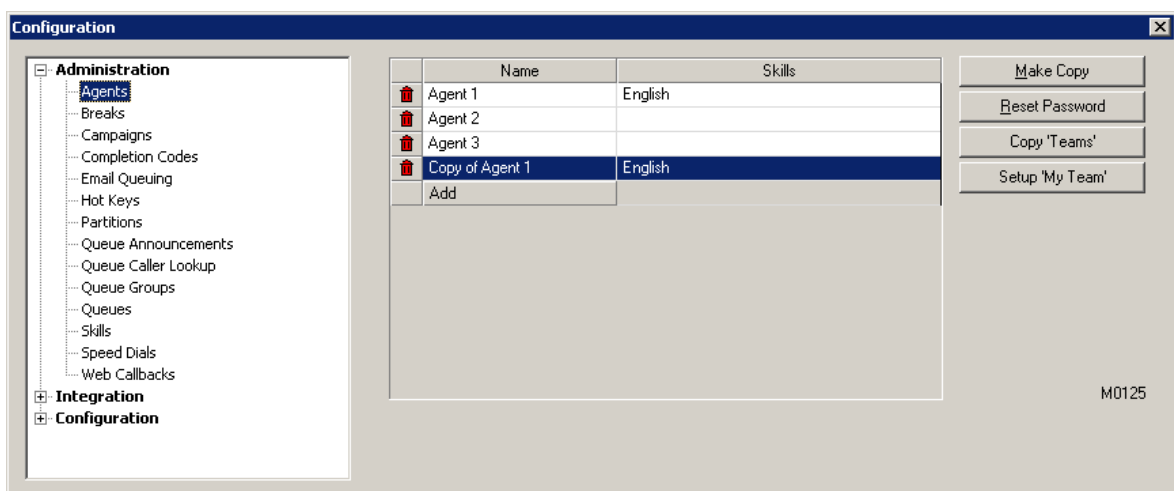
Maximum Chats – This option allows the number of maximum chats to be set.

Allow send/receive notes for anyone – This options allows the agent to send and receive notes from anyone.

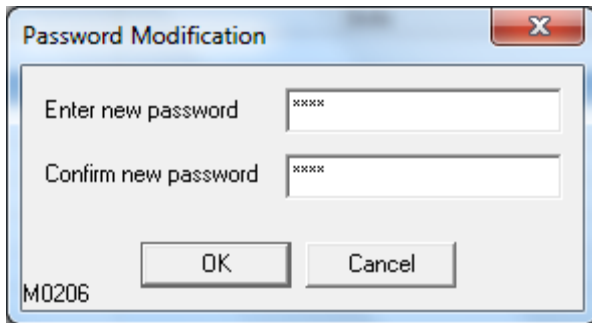
Only see 'my team' - This option disables editing the team in the CCCS Desk Client and only agents part of the team are in CCS Desk Client.

6.1.1.1 Other Functions

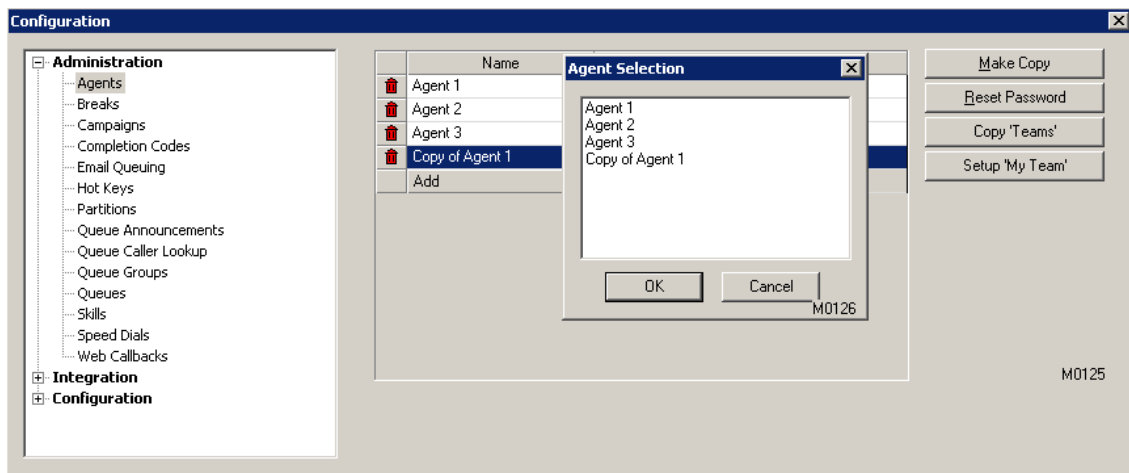
Existing agent profiles can be copied by selecting an agent to copy from and click the 'Make Copy' button. All settings are copied across and the new agent will be created with the name 'Copy of X' which can be modified further.



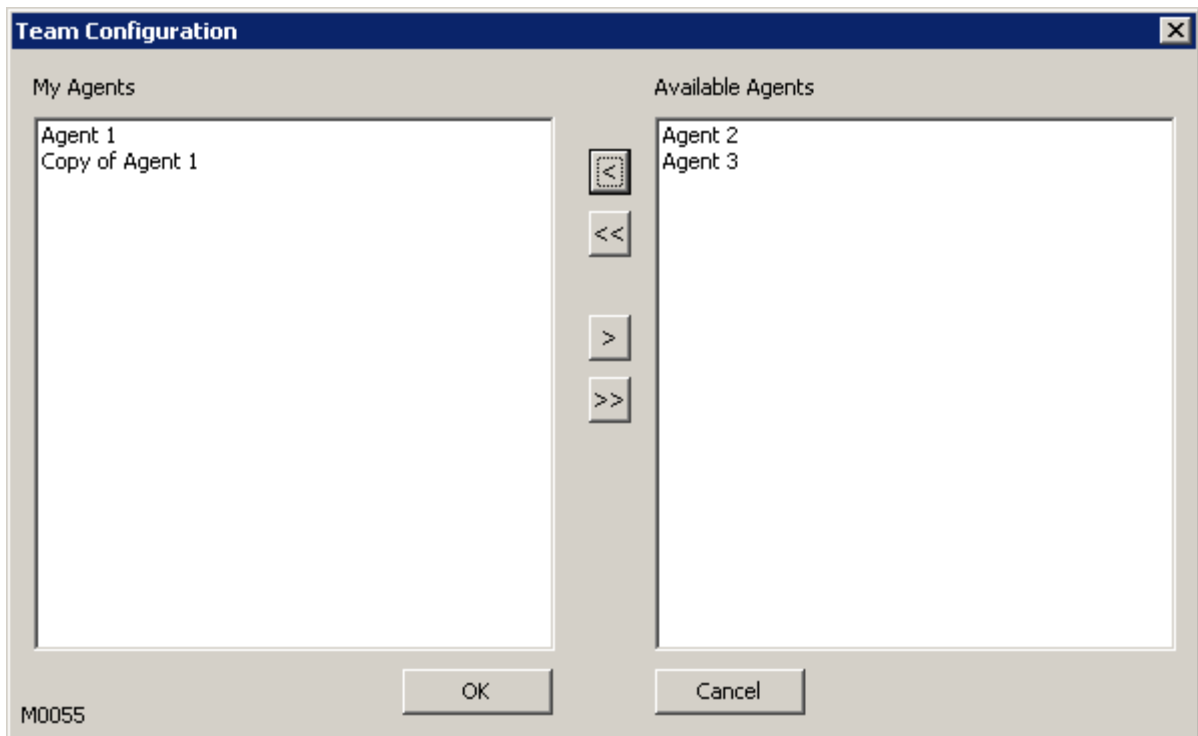
Selected agent can have their password reset by clicking the 'Reset Password' button and enter the new password.



An agent's Teams setting can also be copied to other agents by using the 'Copy Teams' button. Select the agent to copy from and highlight one or more agents to copy into.

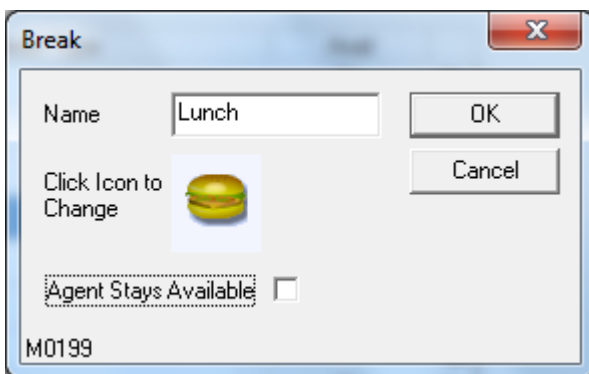
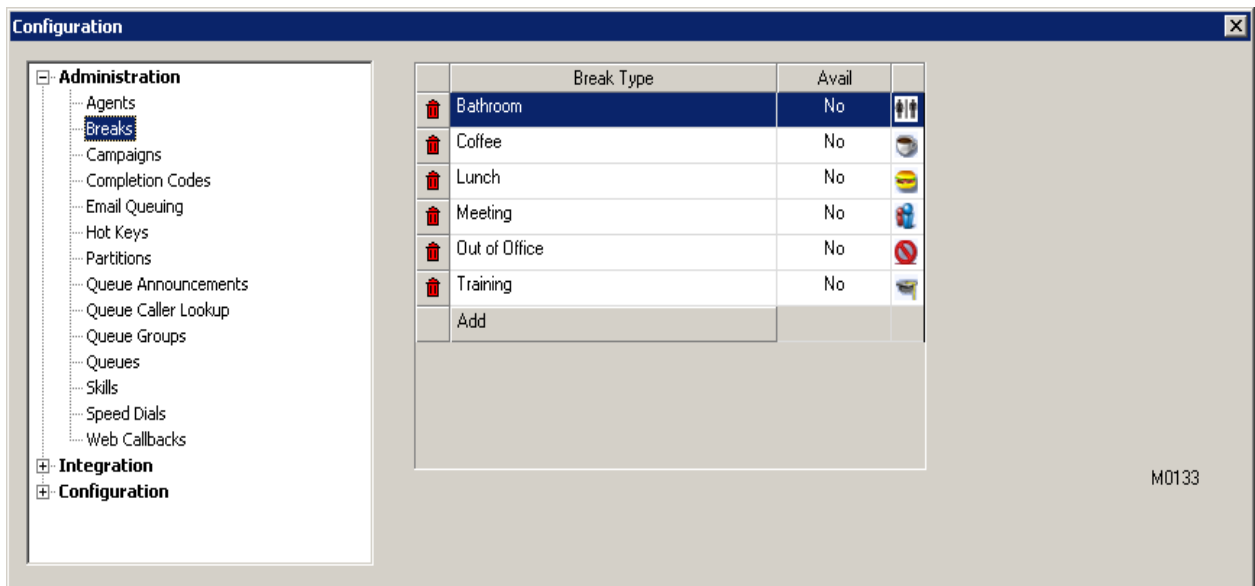


An agent's Teams can be setup by using the 'Setup 'My Team'' button. Select the agent you want to add from the 'Available Agents' then click the arrow buttons pointing to the left. To remove the agents select the agent from 'My Agents' then click the arrow buttons to the right.



6.1.2 Breaks

Break option allows the agents to manage presence and log out of the CCS Desk system so they will not receive any calls. A new Break status can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Name – Name of the break.

Icon – choose from the available list of built-in icons. It is not possible to add a custom icon.

Agent Stays Available – agent will not be marked as logged out when using this break

New break will become immediately available to all logged on agents, and any agents that log on in future.

6.1.3 Campaigns

The Campaigns tab in CCS Desk Manager is used to add, remove and configure campaigns for outbound telemarketing or callback. There are several types of campaigns, and each queue type also has different set of tabs available for configuration:

- Campaign

Purpose

Run an outbound telemarketing campaign with either Preview or Progressive mode.

Tabs

- General
- Completions
- Integration

- Callback

Purpose

Send customer's requests, such as web callback, callback in queue, back to the agents. This campaign does not have 'Integration' tab.

Tabs

- General
- Completions

- Pre-emptive

Purpose

Run an outbound telemarketing campaign in Pre-emptive mode.

Tabs

- General
- Completions
- Integration
- CCS Call

- SMS

Purpose

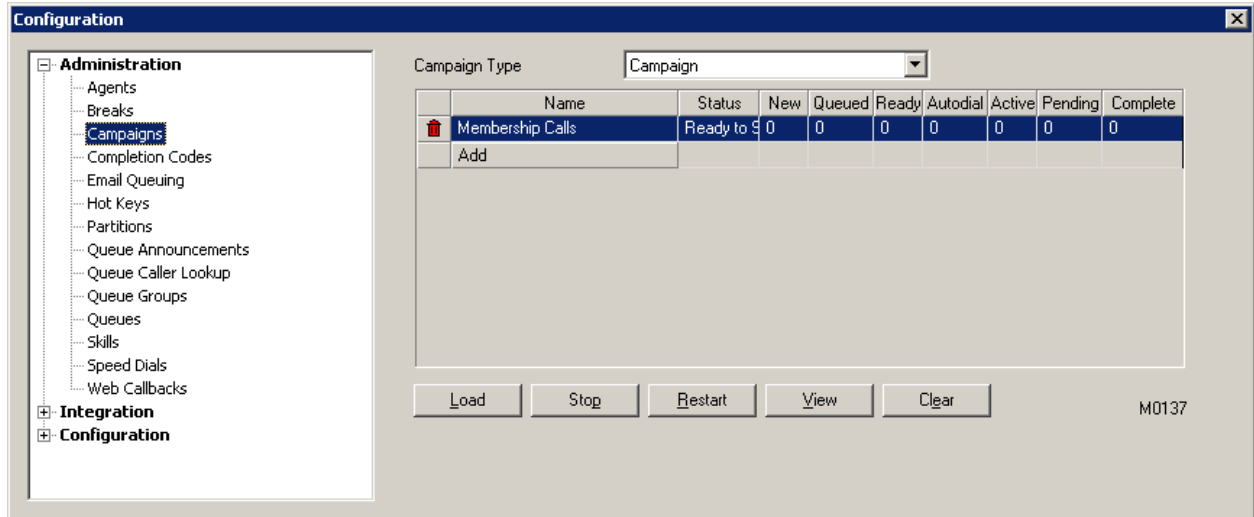
Send an SMS broadcast to all marketing contacts. This mode requires CCS SMS module.

Tabs

- General
- Integration
- SMS

The 'Campaign Type' box allows you to switch from one campaign type to another. A new campaign for the selected type can be added by clicking on the 'Add' button, and an existing one can be deleted by

clicking on the 'red bin' icon. By default the list is sorted by campaign names in alphabetical order. You can change the sort method of this list by double clicking on the column names.



The next sections explain the configurations in each tab. Note as mentioned above, each campaign type has different set of tabs available for configuration, and the options inside each tab may also differ.

6.1.3.1 General

Configure Campaign : Membership Calls

General | Completions | Integration

Name: Membership Calls 10

Queue: CCS Call Team

Agent Mode: Preview

Maximum Retries: 3

Seconds before dialing: 0

Seconds between calls: 0

Call Priority: 1 (1 is the lowest priority)

Has Expiry Date: 7/12/13 You must be logged in as a named user with a password to use this

Multi Dial Mode:

M0138

OK Cancel

Name – The name of the Campaign.

Queue – Where the campaign calls will be distributed into. (**Queue type: CCS Call Team**)

Agent Mode – The campaign dialing mode.

- **Preview** – The campaign call is presented to the agent and they click the dial button when ready. This option is available in **Campaign type: Campaign** and **Callback**.
- **Progressive** – The campaign call is presented to the agent and will start dialing according to the ‘Seconds before dialing’ configuration. This option is available in **Campaign type: Campaign** and **Callback**.
- **Pre-emptive** – An automatic dialler that calls the numbers and transfers the call to an available agent, when a ‘Human Answer’ is detected. This option is available only in **Campaign type: Pre-emptive**.

- **SMS** – Sends an SMS to each contact. This option is available only in **Campaign type: SMS**.

Maximum Retries – Set the amount of times the call will be retried if engaged or unanswered is detected. If this value is smaller than the completion code 'Number of Retries' configuration, then the completion code setting is overridden.

Seconds Before Dialling – The time before the system starts dialling automatically. This option is available only when Agent Mode is configured as Progressive.

Seconds Between Calls – The Available time required before an agent can be assigned with a new campaign call. This is slightly different to the conventional wrap-up time, in that here the agent is actually available so can still take calls from other sources.

Call Priority – Sets the priority of the campaign call over other calls the agent may receive. 1 is the lowest priority.

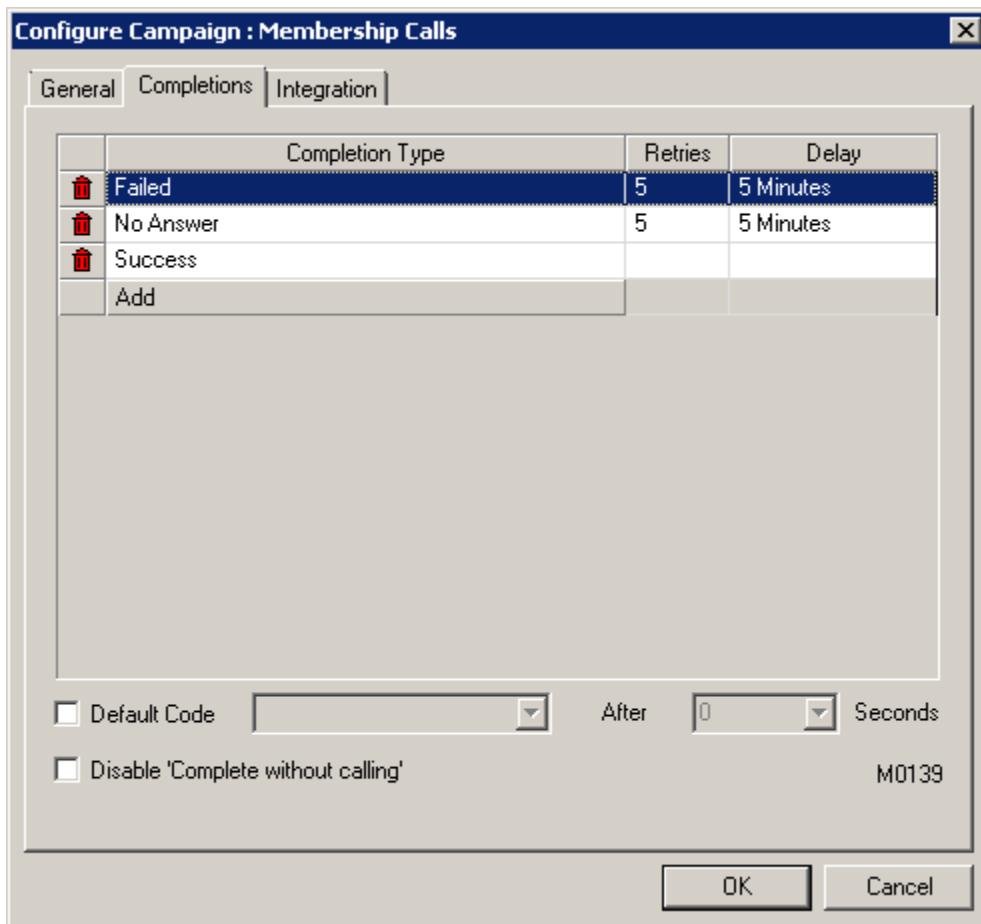
Has Expiry Date – This option is only available if you log in to CCS Desk Manager as a user with administrator privilege, not the built-in Administrator account, and that user must have a password associated with it. Once the Campaign is saved with an expiry date, it cannot be changed. Once the expiry date is reached, that campaign cannot be restarted or reloaded.

Multi Dial Mode – Applicable to Preview mode only. When enabled, this allows agent to make as many campaign call attempts in one assignment. Each call attempts still require a completion code. When agent is ready to move to the next assignment, agent will click the 'Complete' button and given the option to complete or re-schedule the call.

Complete Code – The completion code that will be executed when agent has finished an assignment in multi dial Preview mode. Ideally, this should be set to a 'No Retries' completion code type.

Reschedule Code – The completion code that will be executed when agent reschedules an assignment in multi dial Preview mode. Ideally, this should be set to a 'Scheduled Callback' completion code type.

6.1.3.2 Completions



Completion Type – Assign completion codes to the campaign. Default completion codes are automatically added and cannot be removed from the campaign.

Default Code – When enabled, this overcomes the situation where users are taking too long to enter a code. A default code can be specified, which will automatically be selected if the user has finished the call and has still not entered a code after x seconds of the call ending.

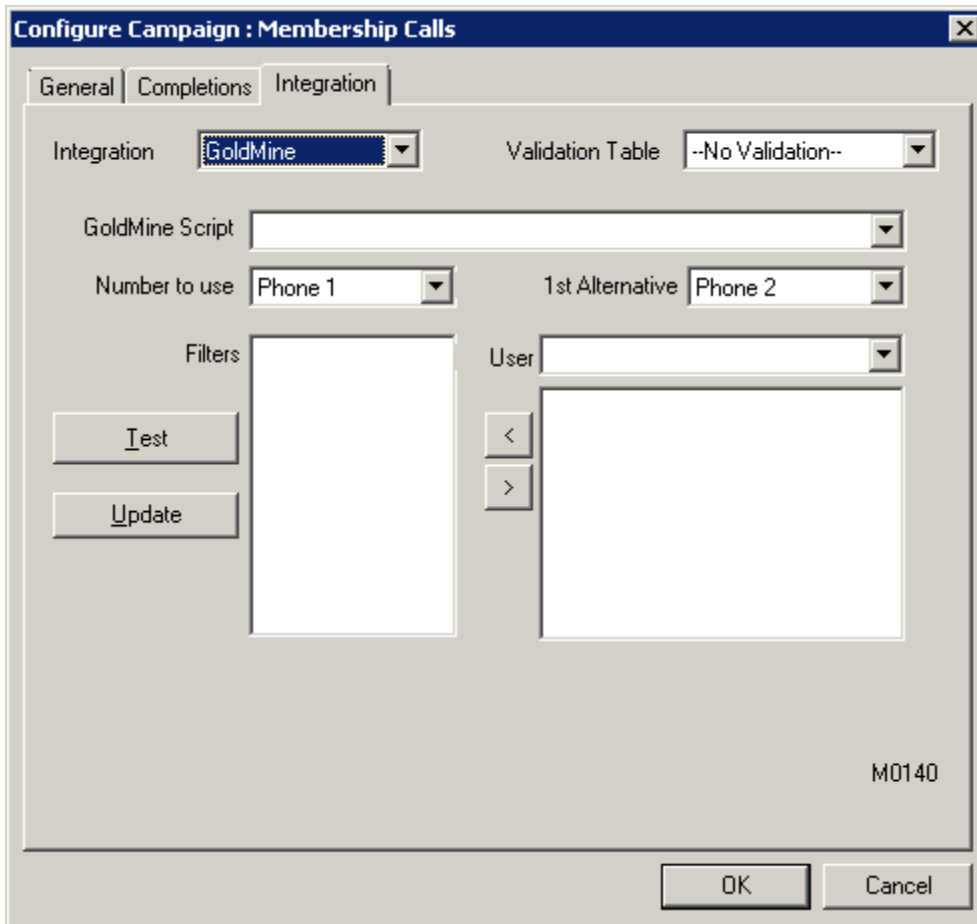
Disable ‘Complete Without Calling’ – Disable the option in CCS Desk.

6.1.3.3 Integration

Integration – The CRM or database application to load contact records for the campaign.

Validation Table – A validation set removes invalid or incomplete numbers.

6.1.3.3.1 GoldMine



GoldMine Script – A script can be selected so the agent is shown what to say to the caller. The script is created and maintained within GoldMine.

Number to Use – The GoldMine fields which contain the primary phone number for the contact.

1st Alternative – If 'Number to Use' is empty, this GoldMine field may contain alternative number for the contact.

User – The Goldmine user who owns the filters.

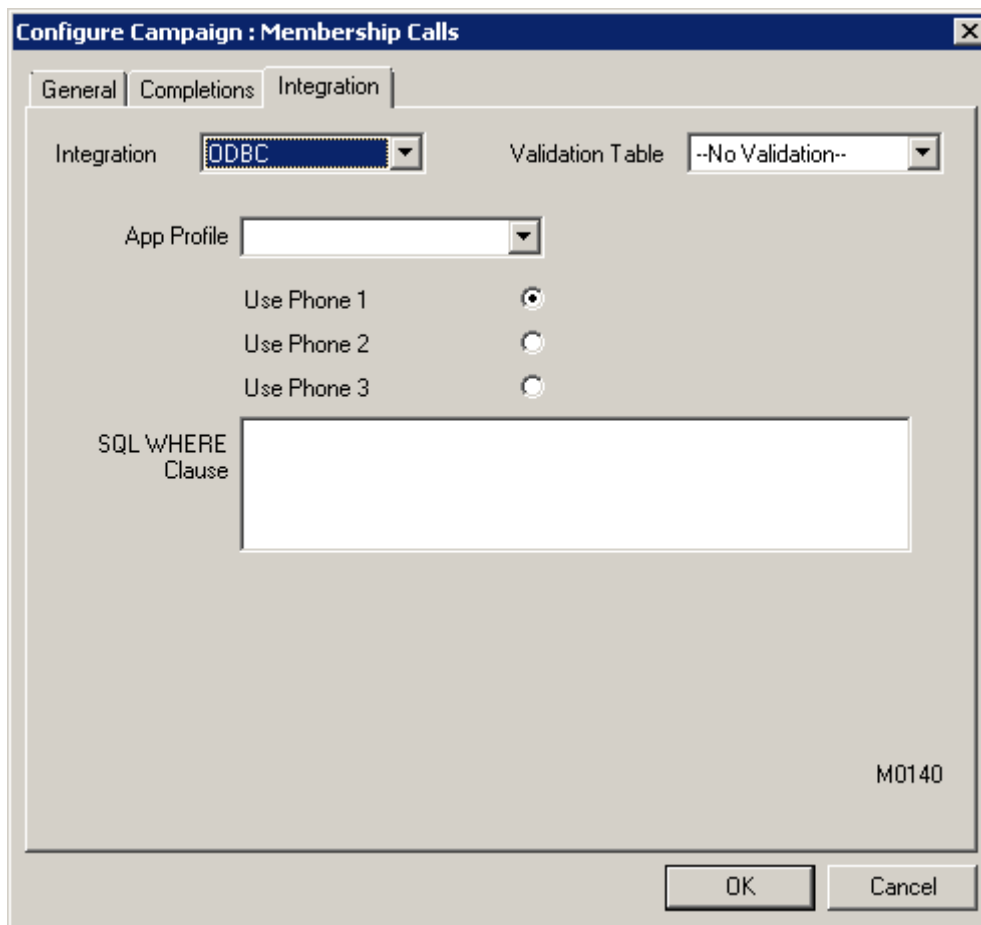
Arrows – Add or remove the filters to the campaigns.

Test – Returns the number of unique records for the campaign.

Update – Update the campaign with new contacts found in filters.

If multiple filters are used and two or more filters have found the same contact the campaign will automatically remove the duplicate and only load unique records.

6.1.3.3.2 ODBC

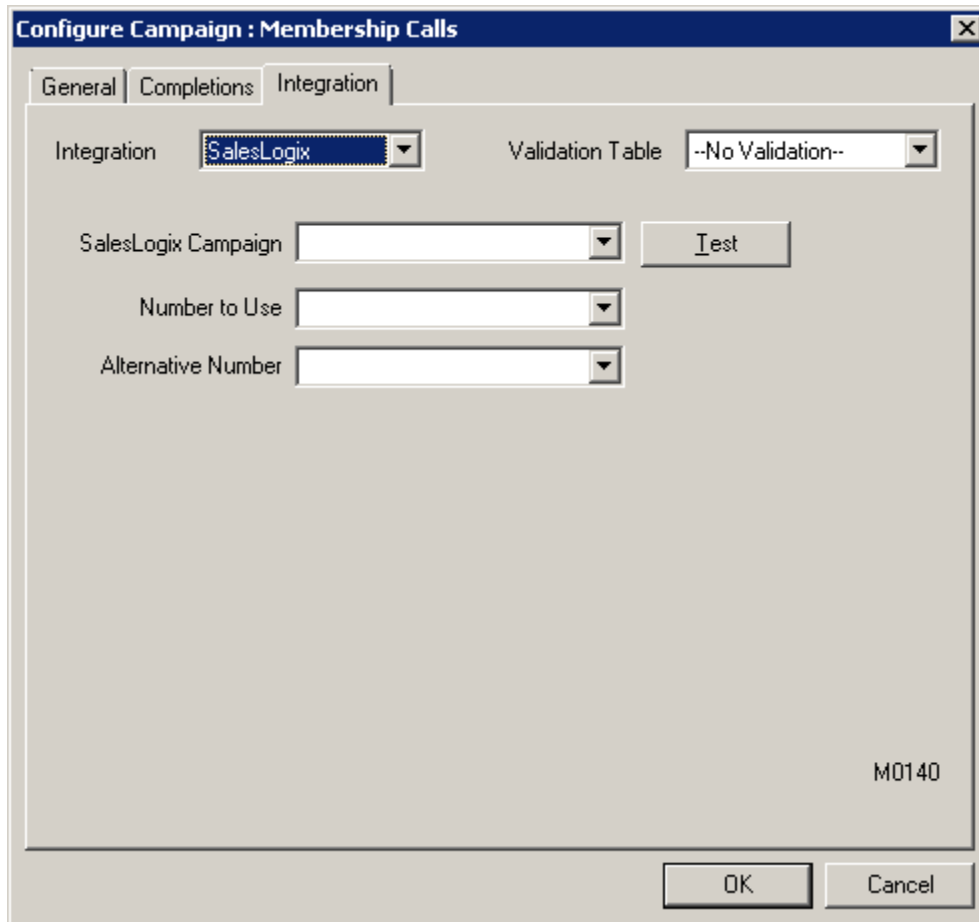


App Profile – The ODBC integration profile to be used. Please consult the *CCS Desk Manager – ODBC* Section 2.9.26 for more information.

Use Phone 1, 2 or 3 – Select which phone number configured in the profile of the other application that the campaign will use to dial the client.

SQL WHERE Clause – Can be used to filter the call data to be loaded into the Campaign

6.1.3.3.3 SalesLogix



CCS Desk Manager can directly import a Campaign from SalesLogix into a CCS Call Campaign. SalesLogix must be running on the same machine as CCS Desk Manager.

SalesLogix Campaign – the name of the campaign in SalesLogix. The 'Test' button will report how many records are in the given SalesLogix campaign.

Number to Use – The SalesLogix field that contains the primary phone number for each contact.

Alternative Number – The SalesLogix field that contains the alternative phone number to be used if the primary number field is empty.

6.1.3.3.4 Microsoft CRM4

The screenshot shows a dialog box titled "Configure Campaign : Membership Calls" with a close button (X) in the top right corner. The dialog has three tabs: "General", "Completions", and "Integration", with "Integration" selected. The "Integration" tab contains the following fields and controls:

- Integration:** A dropdown menu set to "Microsoft CRM4".
- Validation Table:** A dropdown menu set to "--No Validation--".
- CRM Profile:** An empty dropdown menu.
- Source Type:** A dropdown menu set to "Marketing1".
- Marketing List:** An empty dropdown menu.
- Number to use:** A dropdown menu set to "Telephone1".
- Completion Field:** An empty text input field.
- Name Field:** An empty text input field.
- Company Field:** An empty text input field.
- Test:** A button with the text "Test".
- Right Panel:** A large empty area with a vertical scrollbar on the right side.
- Bottom Right:** The text "M0140".
- Bottom:** "OK" and "Cancel" buttons.

CRM Profile – The Microsoft Dynamics CRM integration profile to be used. Please consult *CCS Desk Manager – MSCRM* Section 2.9.23 for more information.

Source Type – A Dynamics CRM Marketing List or User Query can be used as a source for the campaign.

Marketing List / User Query – The list of available sources to choose from.

Number to Use – The Dynamics CRM field that contains the primary phone number of the contact.

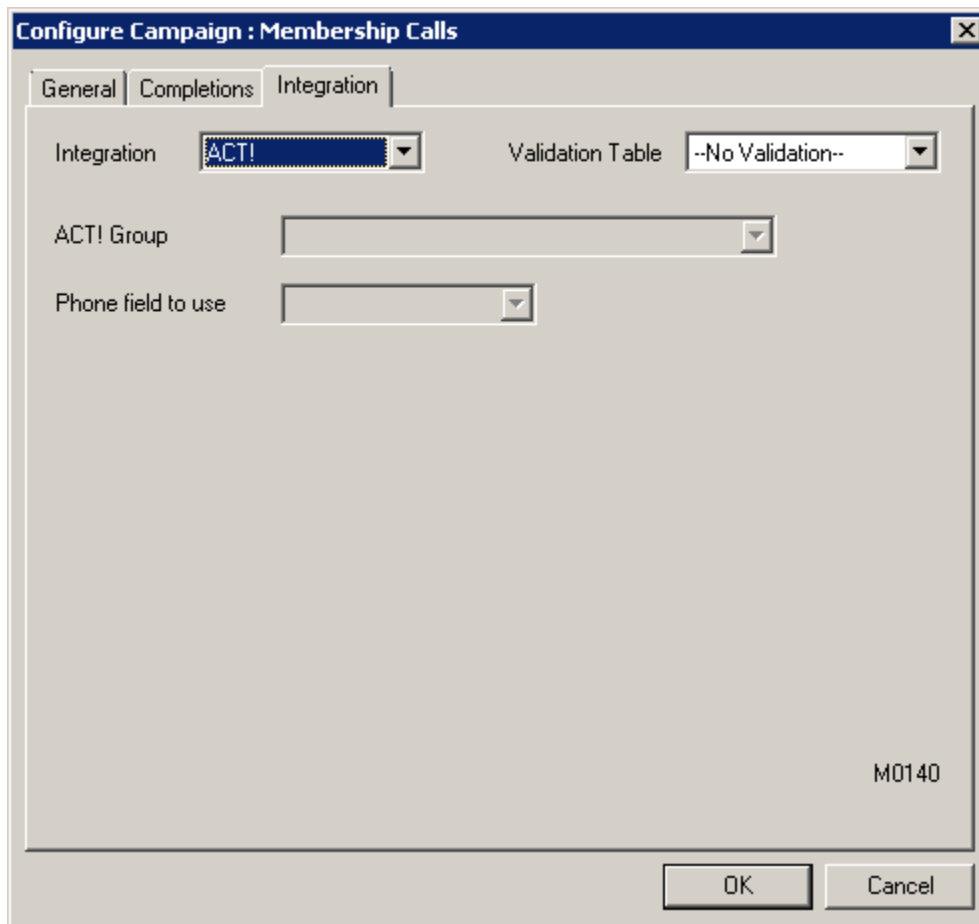
Completion Field – The Dynamics CRM field that will be populated with the completion code selected by the user. If this field is left blank, no update will be attempted.

Name Field – The Dynamics CRM field that contains the name of the contact. This setting is required for User Query.

Company Field – The Dynamics CRM field that contains the company name of the contact. This setting is required for User Query.

Clicking the 'Test' button will attempt to read the source and return the number of contact records found.

6.1.3.3.5 ACT!



CCS Desk Manager can directly import contact records from ACT! into a CCS Call Campaign. ACT! must be running on the same machine as CCS Desk Manager.

ACT! Group – List of available 'Groups' in ACT! (the number of members of each group is shown in brackets).

Phone field to use - The ACT! field that contains the primary phone number for the contact.

6.1.3.3.6 Generic Integration

The screenshot shows a dialog box titled "Configure Campaign : Membership Calls" with a close button (X) in the top right corner. The dialog has three tabs: "General", "Completions", and "Integration", with "Integration" currently selected. The "Integration" tab contains the following fields and controls:

- Integration:** A dropdown menu with "Generic Integration" selected.
- Validation Table:** A dropdown menu with "--No Validation--" selected.
- Profile:** An empty dropdown menu.
- Login:** A button located below the Profile dropdown.
- Marketing List:** A dropdown menu with "Login to Load" selected.
- Completion Field:** An empty text input field.
- Telephone Fields:** A dropdown menu with "Login to Load" selected.

At the bottom right of the dialog, the text "M0140" is displayed. At the bottom center, there are "OK" and "Cancel" buttons.

Profile – The Generic CRM integration profile to be used. Please consult *CCS Desk Manager – Generic CRM* Section 2.9.22 for more information.

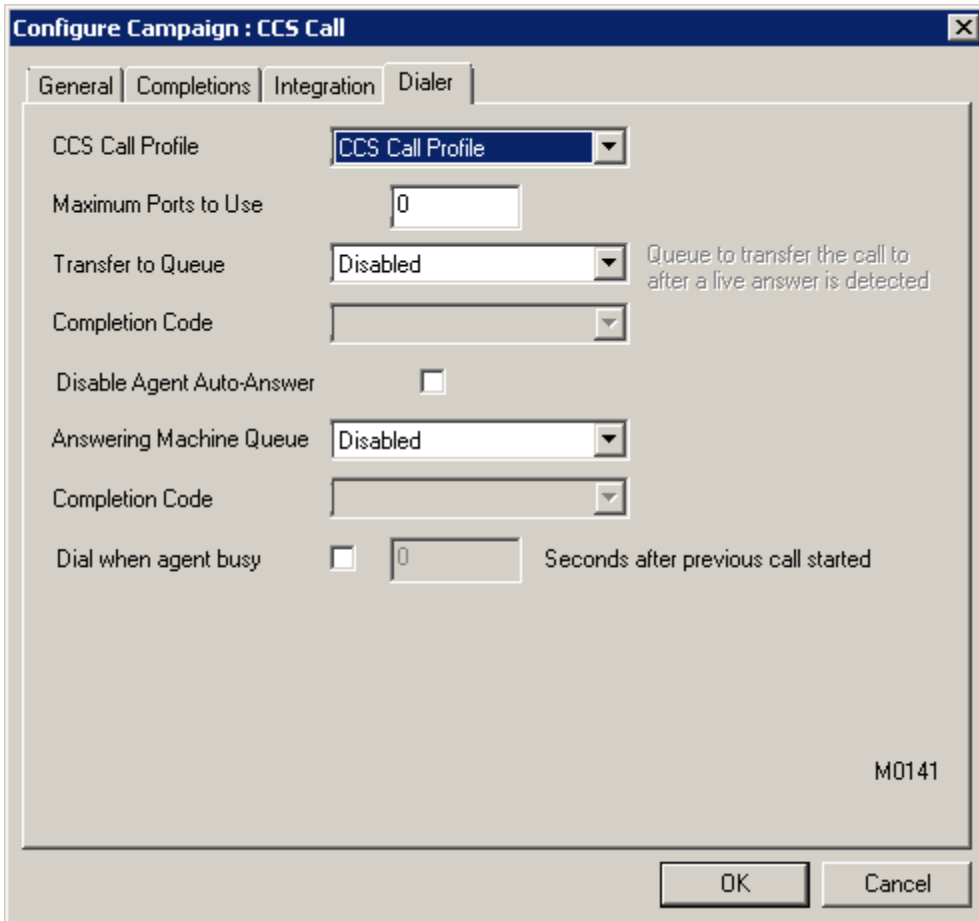
Login – This button must be pressed once the profile has been selected to load the remaining configurations.

Marketing List / User Query – The list of available sources to choose from.

Completion Field – The CRM field that will be populated with the completion code selected by the user. If this field is left blank, no update will be attempted.

Telephone Fields – The CRM field that contains the primary phone number of the contact.

6.1.3.4 Dialer



This configuration in this tab is available only when Agent Mode is configured as Pre-emptive in the General tab.

CCS Call Profile – The name of the CCS Call profile to use for the pre-emptive mode.

Maximum Ports to Use – Maximum number of ports that a pre-emptive campaign can simultaneously use. If this is set to 0, the limit is unrestricted.

Transfer To Queue – If not set to 'disabled', all successful pre-emptive calls are immediately transferred to the specified queue. (**Queue type: Any except Email**)

Answering Machine Queue - If not set to 'disabled', all outbound pre-emptive calls that are answered by an answering machine are immediately transferred to the specified queue.

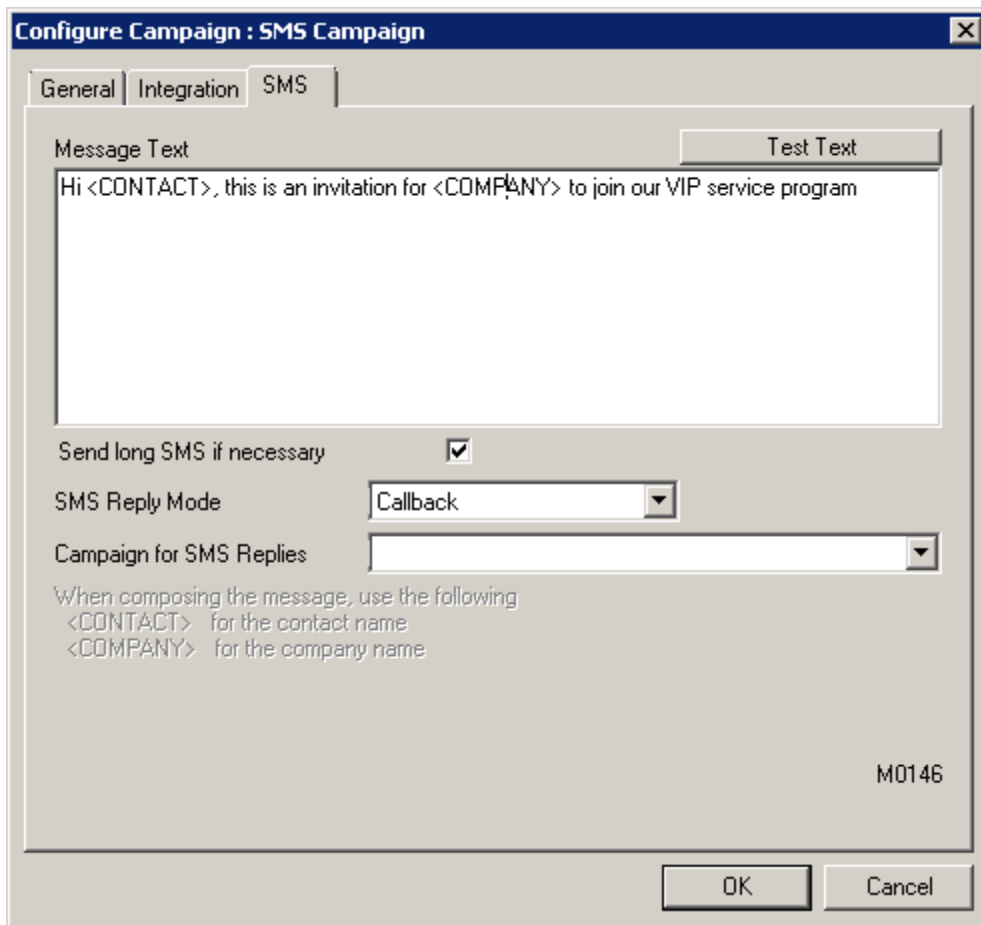
(Queue type: Any except Email)

Completion Code – Each value will be used as a result when a call has been successfully transferred to the queue specified in the 'Transfer to Queue' and 'Answering Machine Queue'.

Disable Agent Auto-Answer – The system forces the pre-emptive calls to be answered as soon as it rings on the agent's telephone. This is to minimize the delay experienced by the customer being called. If this functionality is not desired, it can be turned off by enabling this checkbox.

Dial when Agent Busy - This makes CCS Call pre-emptive operate in a similar fashion to a predictive dialler. As the administrator you will enter a number of seconds after the agent receives a call before they are considered as likely to be free by the time the next call is completed. As an example, if you know that on average every call takes an agent 60 seconds to complete, and that it takes 20 seconds for a new call attempt, you would set this figure as 40, i.e. 60 subtracted by 20.

6.1.3.5 SMS



The configurations in this tab are not available unless the *SMS* agent mode is selected in the General tab.

Message Text – Write the text of the SMS message to be sent. <CONTACT> and <COMPANY> will be replaced by the name and company of the contact loaded into the campaign. Click 'Test Text' to preview.

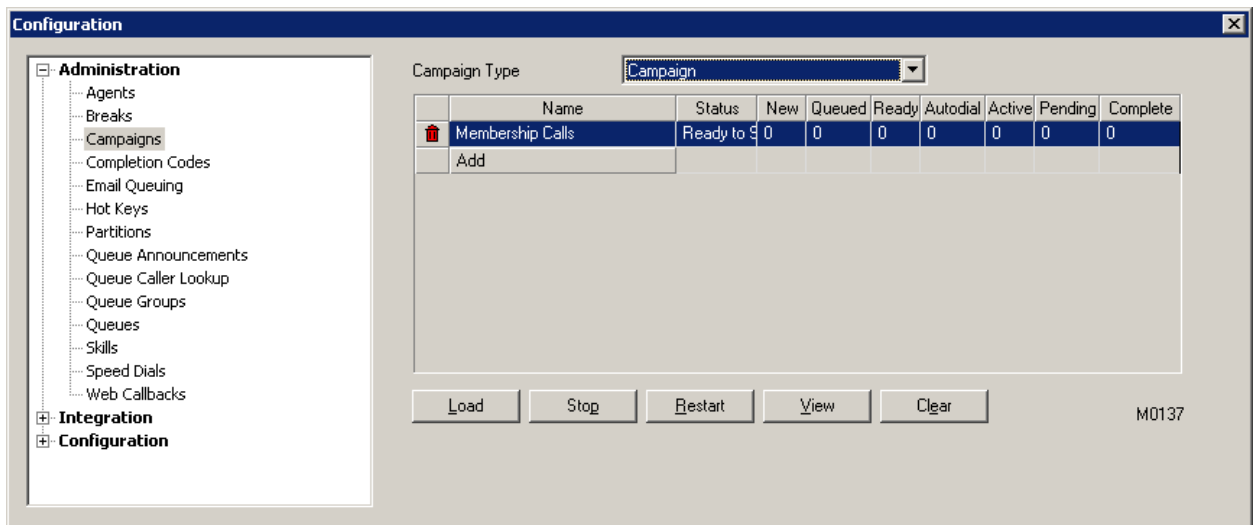
Send long SMS if necessary – Enable this option when the SMS text is longer than 140 characters.

SMS Reply Mode – Callback allows any replies received for this SMS campaign to generate a call back. Other reply modes are listed but not supported at this stage.

Campaign for SMS Replies – The campaign that handles the callback created by the SMS reply.

6.1.3.6 Managing Campaigns

The buttons in the Campaigns tab allows the selected campaign to be loaded and controlled.



Load – Integrates with the configured source and loads the contact records into the campaign. This option is disabled in Campaign type: Callback.

Stop – Pauses a running campaign.

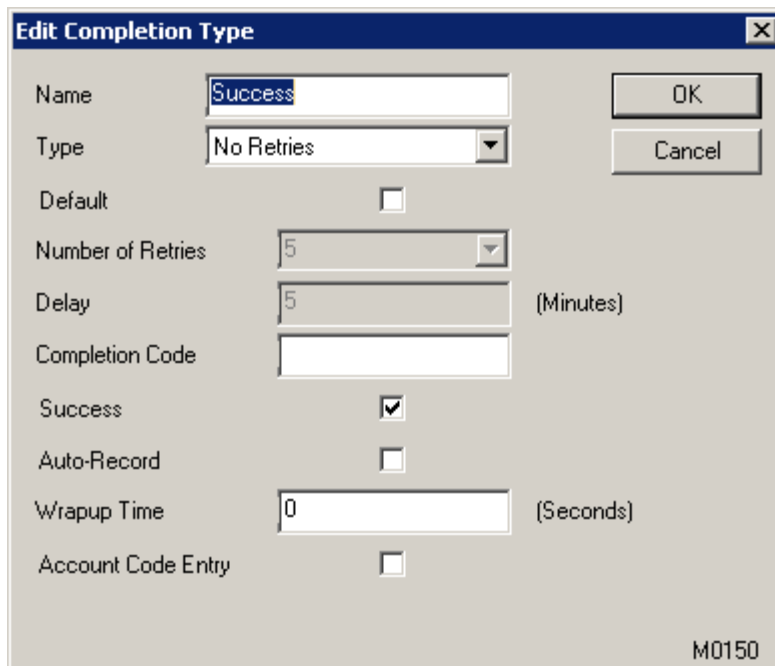
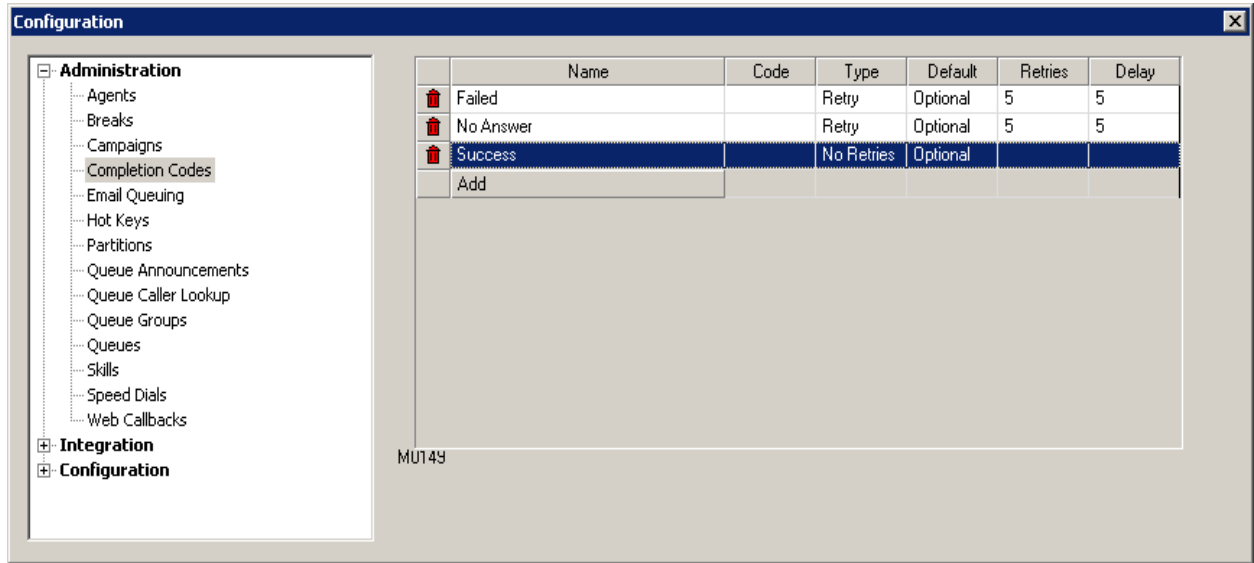
Restart – Starts a stopped campaign.

View – Allows you to view and modify the campaign records.

Clear – Purges all calls in the campaign.

6.1.4 Completion Codes

A completion code is used to mark the result of the call. This code is mostly used with CCS Q inbound queue calls and CCS Call outbound campaign calls. A new completion code can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Name – the name of the completion. If it has a ‘-’ in the name, the system will treat the first part of the code as a group, and the second part is a code within that group. This is only applicable when ‘Tree Format’ is enabled.

Type – The result type of the completion code.

- **No Retries** – No more activity required for this call.
- **Retry** – A callback is automatically scheduled, according to the Number of Retries and Delay settings.
- **Scheduled Callback** – A callback needs to be scheduled by the agent using the calendar.

Default – This is ticked if the user wishes for the completion code to be automatically included in all campaigns.

Number of Retries – If the type is Retry, this is the maximum number of callback attempts allowed with this code.

Delay – The delay in minutes before a call completed with a Retry code will return.

Completion Code – The code that defines the result of the call.

Success – In some CRM system integration, this code can mark a Success field as successful or unsuccessful.

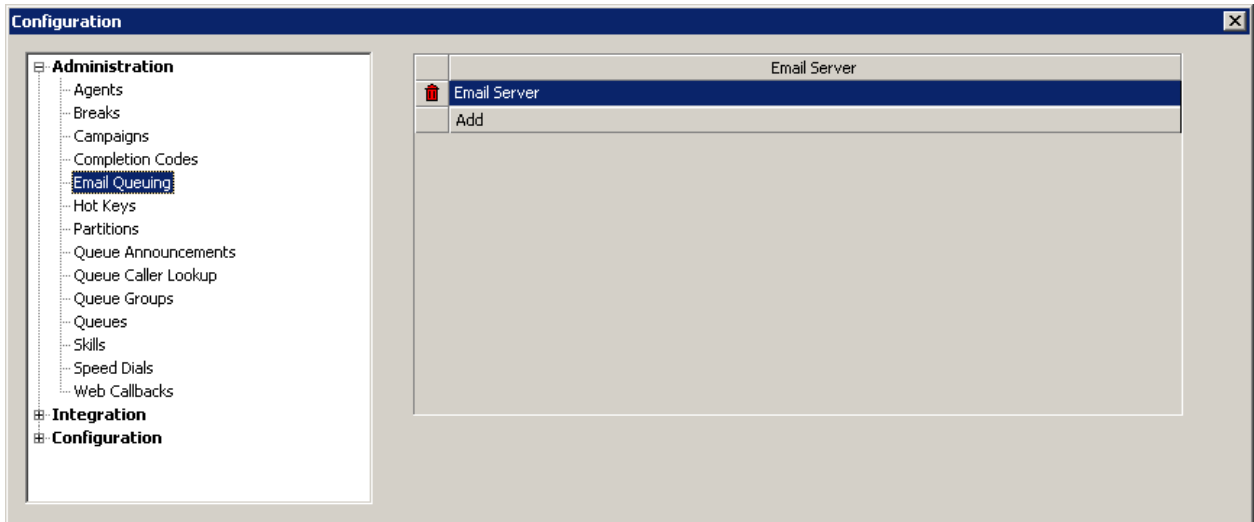
Auto-Record – If this option is selected, the call recording via CCS Record will be triggered (effectively the same as the agent clicking 'Start Recording' from CCS Desk). If a recording session is already in progress when the code is entered, the current recording will be finished, and the rest of the conversation will be recorded in a separate file with the same name, and a numeric suffix.

Wrapup Time – Each completion code can trigger a specific wrap-up time associated with it, which will override the default wrap-up time of the queue or campaign from which the call came.

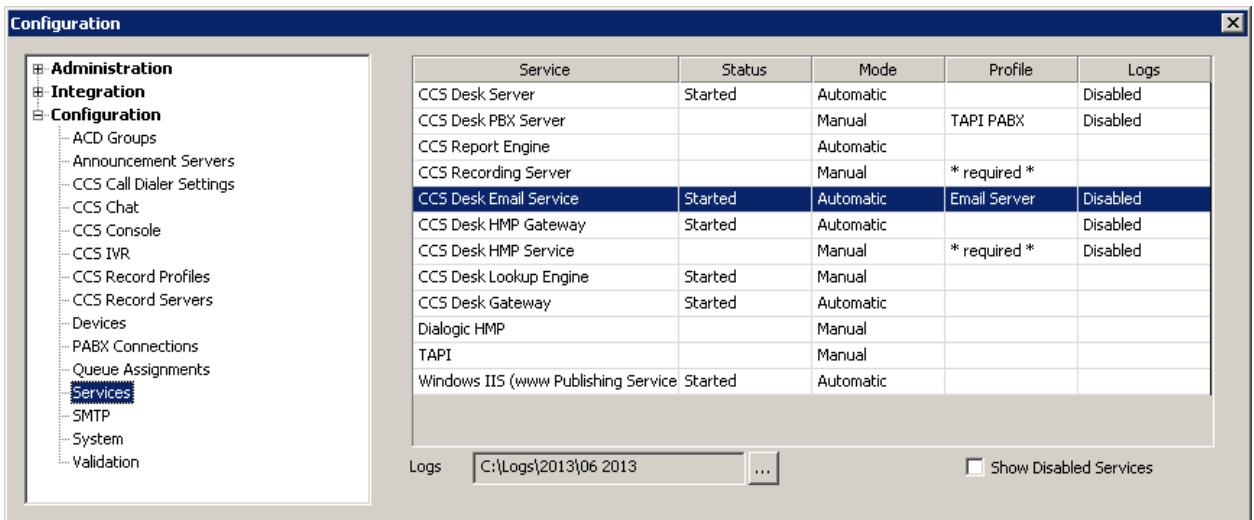
Account Code Entry – If this option is selected, when the user requests this completion code the 'Enter Account Code' screen will also appear.

6.1.5 Email Queuing

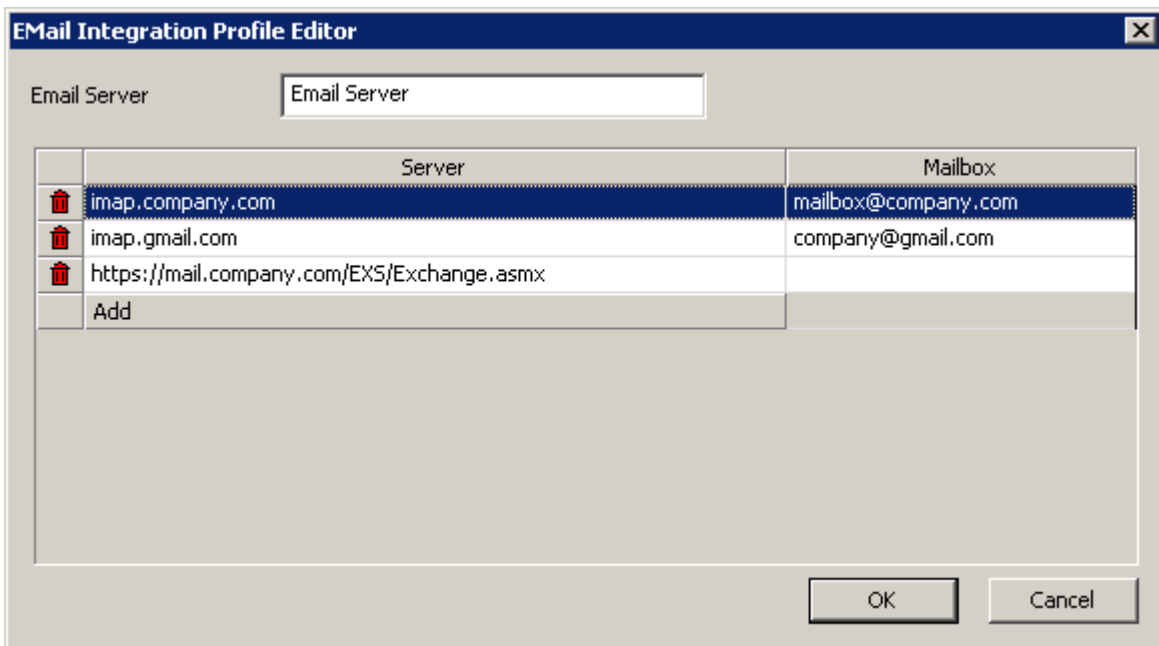
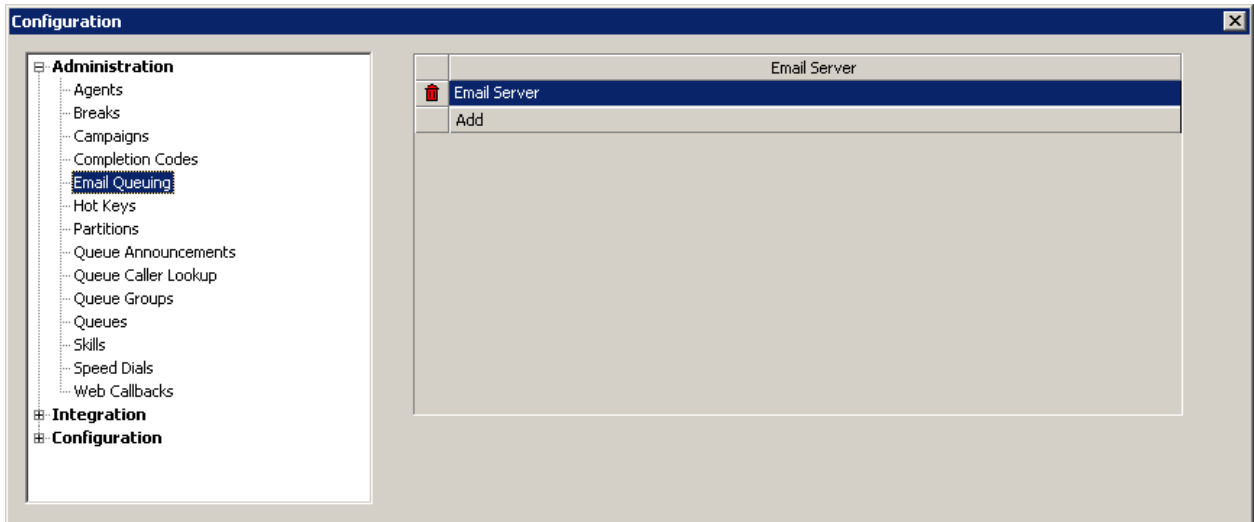
Different Email Server integration profiles can be created in this tab. This is used to enable the Email Queuing feature with CCS Q. New emails that arrive into the inbox will be pushed to a queue, and distributed to the next available agent for completion.



This feature requires the CCS Desk Email Service to be installed and started. This service is included when CCS Desk is installed however it is not enabled by default. Launch CCS Desk Manager. Go to CCS Desk Configuration then select Services then install the CCS Desk Email Service. **Please consult the [Setup Guide for CCS Q Email Queuing](#) document for more information on this feature.**



A new email integration profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



The CCS Q Email Server can integrate to multiple email accounts at once. The supported protocols are:

- **IMAP**
- **Exchange 2007 R2 Web Services**
- **Exchange 2010 Web Services**
- **Microsoft Exchange On-Line Web Services**

A new email account configuration can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.

6.1.5.1 IMAP

The screenshot shows a dialog box titled "Email Interface Editor". It contains the following fields and controls:

- Server Type:** A dropdown menu with "IMAP" selected.
- Queue:** A dropdown menu with "Email Queue" selected.
- Server Name:** A text box containing "imap.company.com".
- Mailbox:** A text box containing "mailbox@company.com".
- Password:** A text box containing "****" and a "Reveal" button to its right.
- Domain:** An empty text box.
- Folder:** A text box containing "Inbox".
- Delete After Processing:** A checkbox that is currently unchecked.
- Poll Interval:** A text box containing "30" followed by the label "Seconds".
- Port:** A text box containing "143".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Server Type – The protocol used to communicate with the email server.

Queue – The queue used to distribute new emails.

Server Name – The network address of the IMAP email server.

Mailbox – The email account.

Password – The mailbox password.

Reveal – Shows the password.

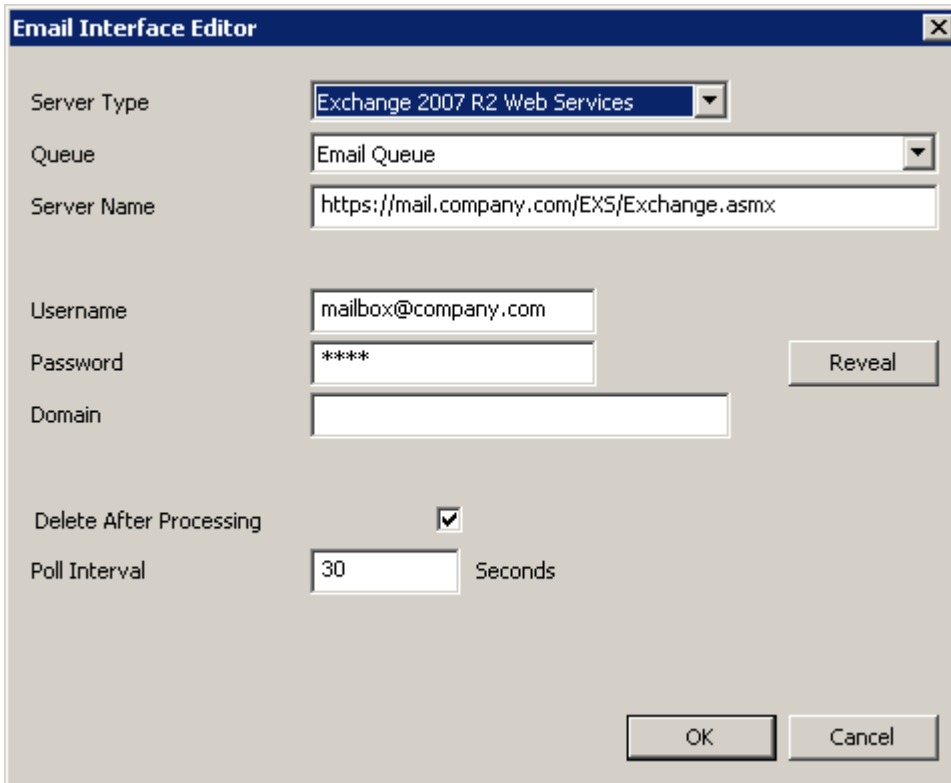
Domain – The domain of the mailbox account, if applicable.

Delete After Processing – When enabled, emails are deleted from the mailbox once forwarded into the queue.

Poll Interval – How frequent CCS Q Email Server checks for new emails in this account.

Port – The TCP port for IMAP communication. The standard port is 143.

6.1.5.2 Exchange 2007 R2 Web Services



The screenshot shows a dialog box titled "Email Interface Editor" with the following fields and controls:

- Server Type:** A dropdown menu set to "Exchange 2007 R2 Web Services".
- Queue:** A dropdown menu set to "Email Queue".
- Server Name:** A text box containing "https://mail.company.com/EXS/Exchange.asmx".
- Username:** A text box containing "mailbox@company.com".
- Password:** A text box containing "****" and a "Reveal" button to its right.
- Domain:** An empty text box.
- Delete After Processing:** A checkbox that is checked.
- Poll Interval:** A text box containing "30" followed by the label "Seconds".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Server Type – The protocol used to communicate with the email server.

Queue – The queue used to distribute new emails.

Server Name – The network address of the Exchange 2007 R2 Web Services.

Username – The email account.

Password – The mailbox password.

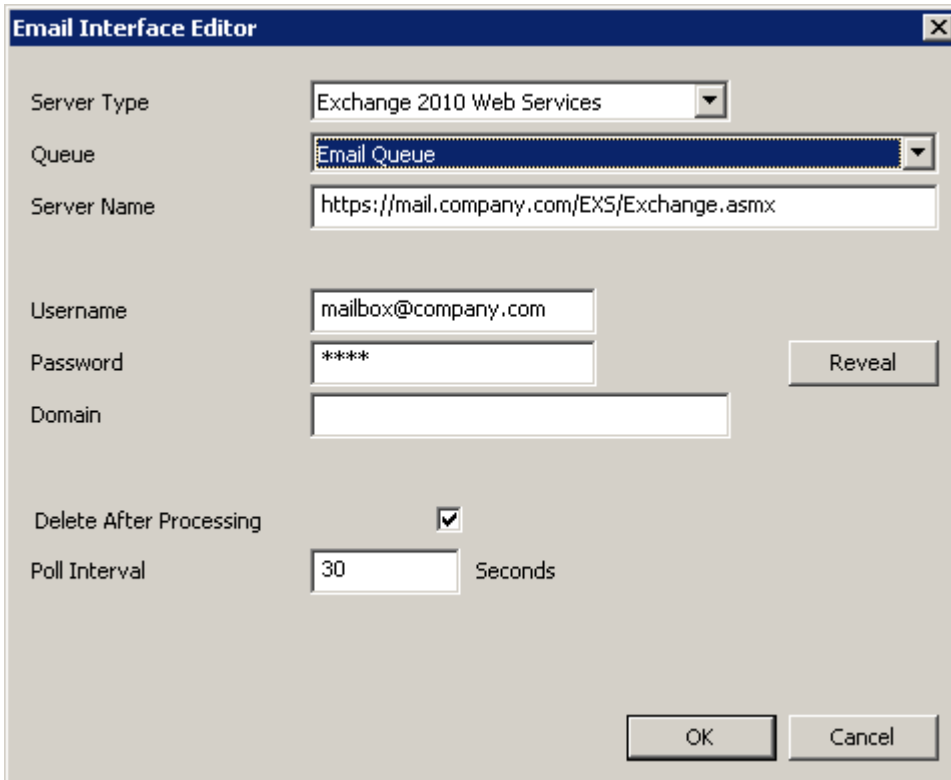
Reveal – Shows the password.

Domain – The domain of the mailbox account, if applicable.

Delete After Processing – When enabled, emails are deleted from the mailbox once forwarded into the queue.

Poll Interval – How frequent CCS Q Email Server checks for new emails in this account.

6.1.5.3 Exchange 2010 Web Services



The screenshot shows a dialog box titled "Email Interface Editor" with the following fields and controls:

- Server Type:** A dropdown menu set to "Exchange 2010 Web Services".
- Queue:** A dropdown menu set to "Email Queue".
- Server Name:** A text box containing "https://mail.company.com/EXS/Exchange.asmx".
- Username:** A text box containing "mailbox@company.com".
- Password:** A text box containing "****" with a "Reveal" button to its right.
- Domain:** An empty text box.
- Delete After Processing:** A checkbox that is checked.
- Poll Interval:** A text box containing "30" followed by the label "Seconds".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Server Type – The protocol used to communicate with the email server.

Queue – The queue used to distribute new emails.

Server Name – The network address of the Exchange 2010 Web Services.

Username – The mailbox name.

Password – The mailbox password.

Reveal – Shows the password.

Domain – The domain of the mailbox account, if applicable.

Delete After Processing – When enabled, emails are deleted from the mailbox once forwarded into the queue.

Poll Interval – How frequent CCS Q Email Server checks for new emails in this account.

6.1.5.4 Microsoft Exchange On-Line Web Services

The screenshot shows the 'Email Interface Editor' dialog box. The fields are as follows:

- Server Type: Microsoft Exchange On-Line Web Servi
- Queue: Email Queue
- Server Name: https://mail.company.com/EXS/Exchange.asmx
- Username: mailbox@company.com
- Password: **** (with a 'Reveal' button)
- Domain: (empty)
- Delete After Processing:
- Poll Interval: 30 Seconds

Server Type – The protocol used to communicate with the email server.

Queue – The queue used to distribute new emails.

Server Name – The network address of the Microsoft Exchange On-Line Web Services.

Username – The mailbox name.

Password – The mailbox password.

Reveal – Shows the password.

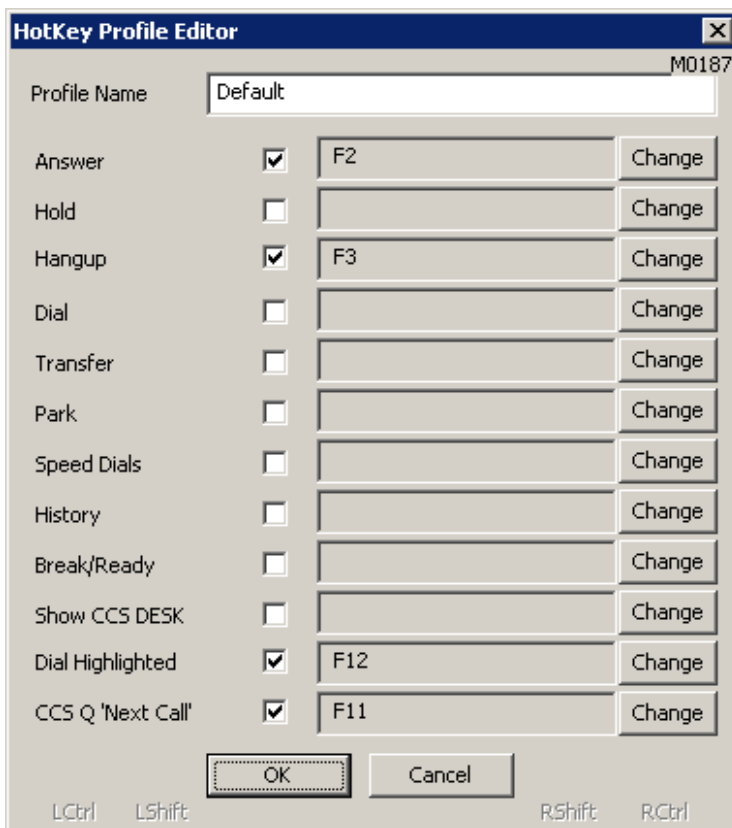
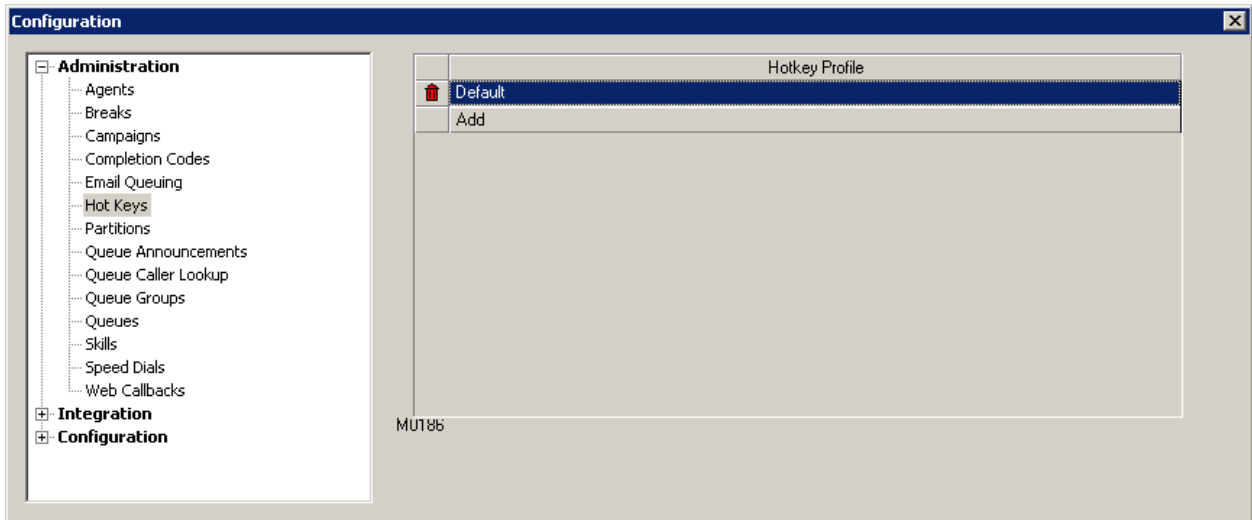
Domain – The domain of the mailbox account, if applicable.

Delete After Processing – When enabled, emails are deleted from the mailbox once forwarded into the queue.

Poll Interval – How frequent CCS Q Email Server checks for new emails in this account.

6.1.6 Hot Keys

CCS Desk includes functionality to allow the user to press a specific key sequence to perform actions such as answering a call, going on a break etc. The Hotkeys tab within CCS Desk Manager contains a list of the keyboard shortcut profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



The check box enables the specific function, and pressing the Change button allows you to select the actual key sequence. Basic alphabets and numeric keys cannot be used as part of the key sequence e.g. A, LCTRL+A, LSHIFT+A, LCTRL + LSHIFT + A, etc.

Answer – to answer a call.

Hold – to put a call on hold or unhold.

Hangup – to end a call.

Dial – to open the dial window in the Active Call panel.

Transfer – to complete the transfer.

Park – to put the call on park.

Speed Dials – to open the Speed Dials panel.

History – to open the History panel.

Break / Ready – to switch between Ready status and the Auto-Break status configured in the agent's profile.

Show CCS Desk – to bring the CCS Desk interface to the foreground.

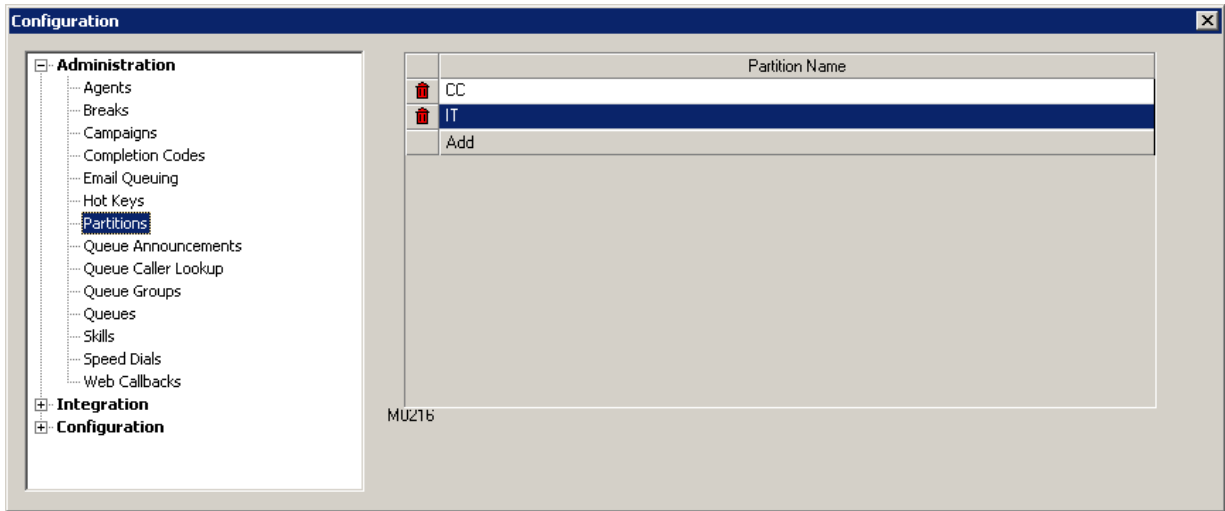
Dial Highlighted – make a call using the highlighted number. Copy to Dial must be enabled in the agent's profile.

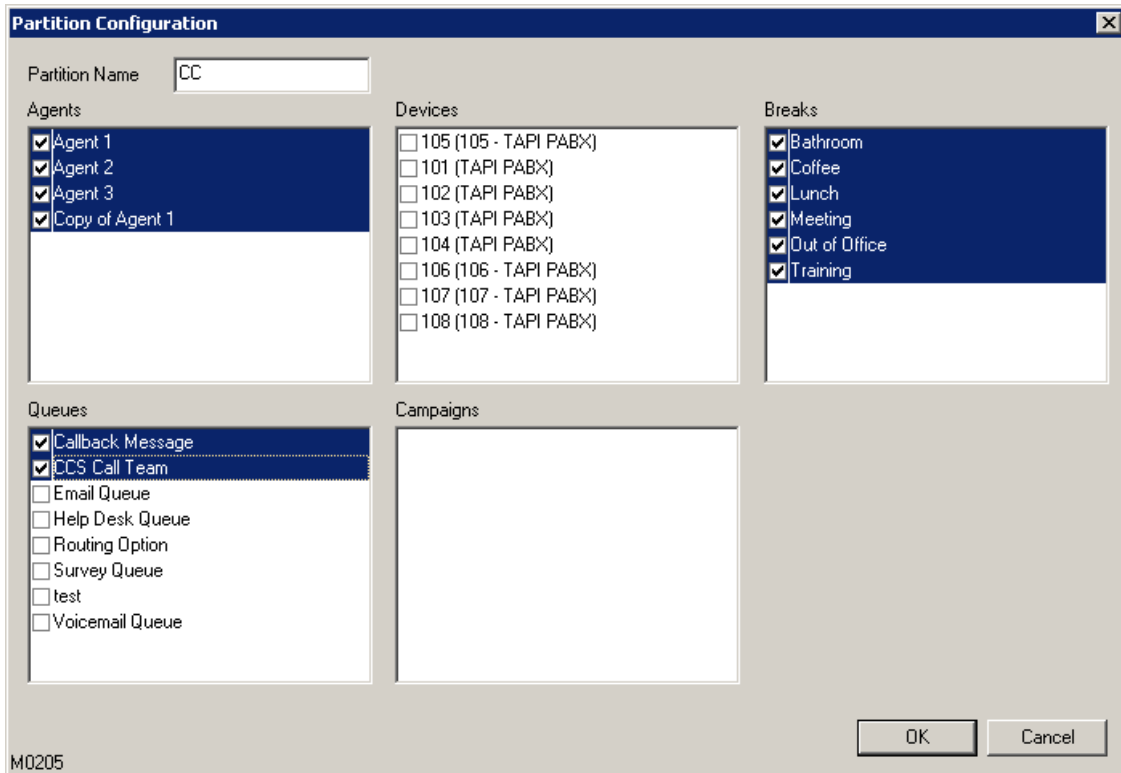
CCS Q 'Next Call' – requests the next call in the queue, even when the agent is on a break or wrap-up.

6.1.7 Partitions

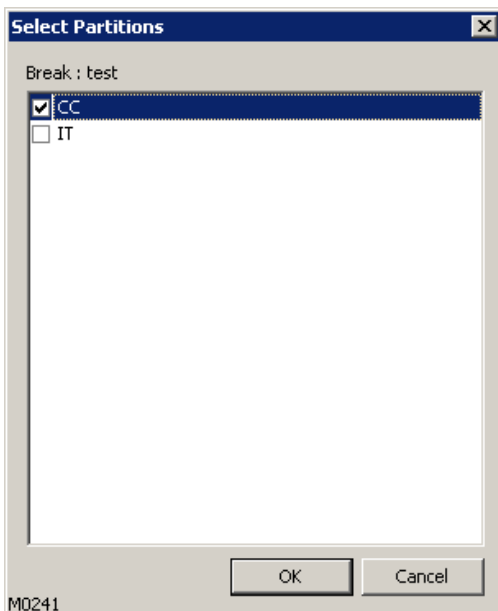
Agents, queues, campaigns, devices and break types can be placed into Partitions, which then can only be seen by the agents in that partition. This enables the system to be divided into logical units, or partitions, in order to simplify individual users' views of the system.

A new Partition profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





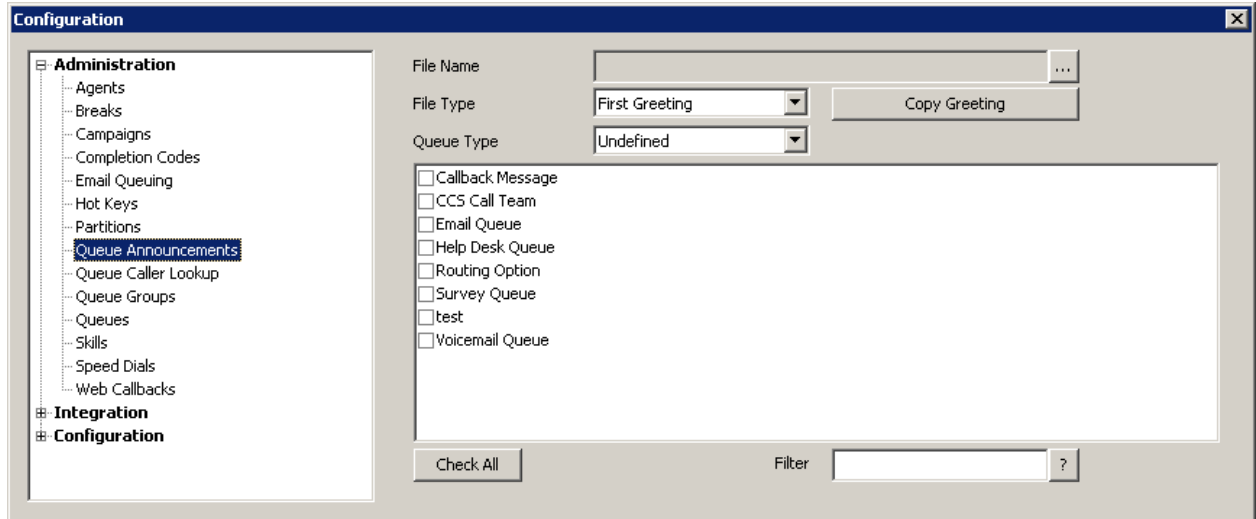
Each object is included by simply checking the checkbox next to its name. Objects may be included in multiple partitions, allowing visibility of all objects in every partition that they are in. When a partition has been created, newly created agents / breaks / campaigns / queues will be prompted to be entered into the partition.



6.1.8 Queue Announcements

Announcements in CCS Desk can be managed using the Queue Announcements tab under Administration. It could be used to manage the process of copying various audio files into respective

queues. Before copying the new file, this tool ensures the audio format is correct and creates a backup of any previous greeting files.



File Name – Shows the file name of the Audio file to be used. The ellipses button is used to browse for the audio files that will be used in the Announcements.

File Type – Lets you choose the File Type of the Audio whether First Greeting, Second Greeting, Third Greeting or Hold Music.

Copy Greeting – Copies the audio file to the selected Queues.

Check All – Button which allows users to select all the Queues

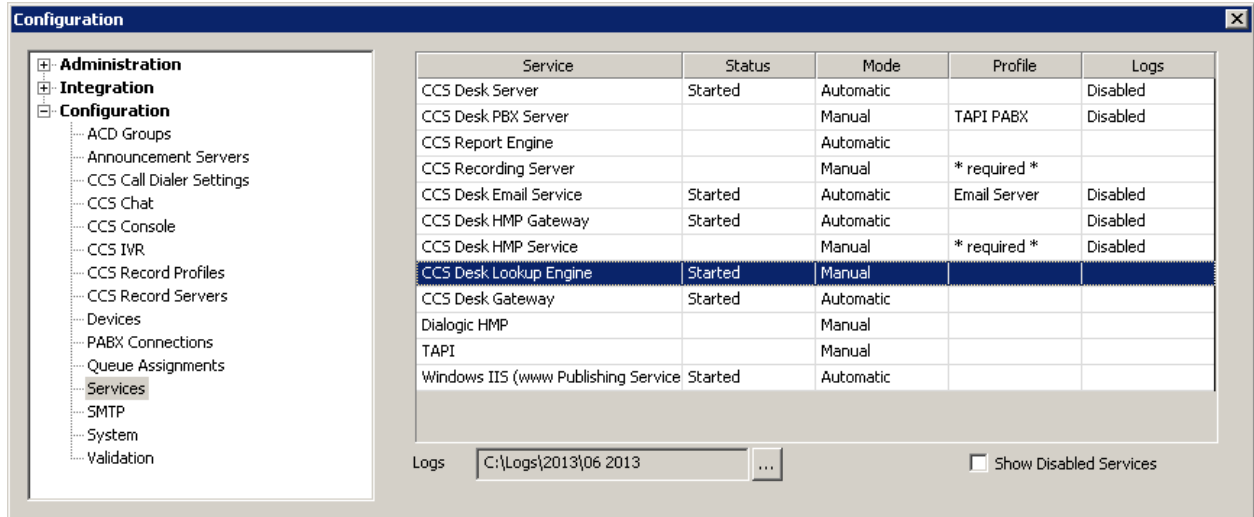
Filter button – Allows users filter the Queues that are available.

6.1.9 Queue Caller Lookup

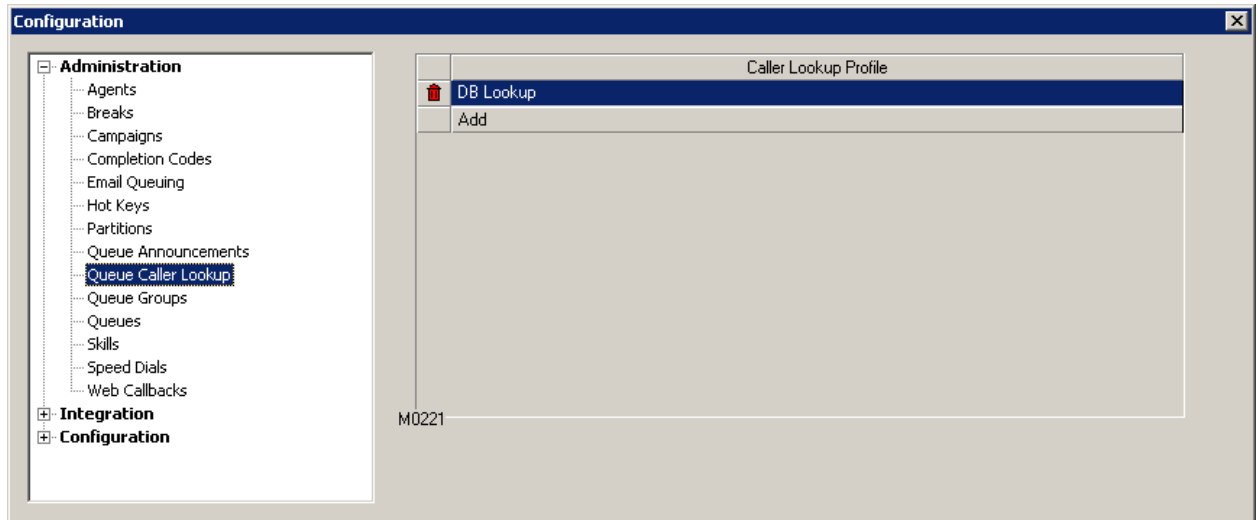
The Queue Caller Lookup contains a list of database lookup profiles that can be used by CCS Q to determine the queue the call must be assigned to, by searching against the caller number.

The caller lookup feature requires the CCS Desk Lookup Engine service to be installed and started. This service is included when CCS Desk is installed however it is not enabled by default. Go to CCS Desk

Manager Configuration, then to Services. Enable the Configuration mode to install the CCS Desk Lookup Engine service and start the service.



A new caller lookup profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.

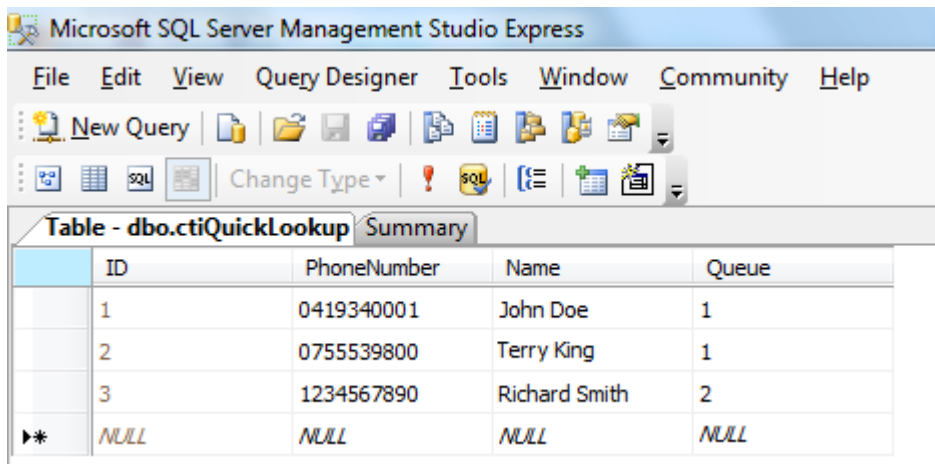


There are 3 types of caller lookup mode:

- **Simple** – Find the destination queue from the ctiQuickLookup table in the CCS database.
- **Advanced** – Integrates with ODBC profiles to find contact ID and the destination queue.
- **Stored Procedure** – Integrates with MSSQL via ODBC by running a stored procedure that returns the destination queue.

6.1.9.1 Simple

This mode searches the ctiQuickLookup table in the CCS database. Tools such as Microsoft SQL Server Studio Express can be used to add records into the table.



The screenshot shows the Microsoft SQL Server Management Studio Express interface. The main window displays a table named 'Table - dbo.ctiQuickLookup' with a 'Summary' tab selected. The table has four columns: ID, PhoneNumber, Name, and Queue. The data is as follows:

ID	PhoneNumber	Name	Queue
1	0419340001	John Doe	1
2	0755539800	Terry King	1
3	1234567890	Richard Smith	2
▶*	NULL	NULL	NULL

ID – Unique identifier automatically assigned by the SQL Server.

PhoneNumber – The number to be compared against the caller number for a match.

Name – The contact name.

Queue – The ID of the queue to assign the call when the caller number matches the PhoneNumber in this record.

Caller Lookup Profile

Name

Lookup Mode

Use Default Queue if no Match

Default Queue

OK Cancel

M0148

Default Queue if No Match – when enabled, the system will route the call to the default queue when searching the ctiQueueLookup table fails to find a match.

Default Queue – where the call will be routed to when the lookup returns zero match.

6.1.9.2 Advanced

The Advanced mode combines customer identification lookup with customer queue assignment lookup. Both lookups are performed via ODBC. The customer identification lookup uses the caller number to find the customer ID as a result. This ID will then be used as an input for the customer queue assignment lookup. Different queue assignments can be set according to the values in the queue ID column.

Caller Lookup Profile

Name: DB Lookup

Lookup Mode: Advanced

Customer Identification

ODBC Profile: []

Multiple Matches: Use First Match

Use Default Queue if no Match:

Default Queue: []

Lookup Queue from CustID:

Customer Queue Assignment

DSN: []

Table: []

Customer ID: []

Queue ID: []

Queue Assignments

Database Value	Queue
----------------	-------

OK Cancel

M0148

Customer Identification

ODBC Profile – the ODBC integration profile configured in CCS Desk.

Multiple Matches – use either first match or last match when there is more than 1 match.

Default Queue if No Match – when enabled, the system will route the call to the default queue when the customer identification process fails to find a match.

Default Queue – where the call will be routed to when the lookup returns zero match.

Lookup Queue from CustID – must be enabled for the feature to work properly.

Customer Queue Assignment

DSN – the ODBC DSN configured in the local machine where the lookup service is running, which connects to the data source that contains the customer queue assignment/.

Table – the table name that contains the customer queue information

Customer ID – the column in the Table that contains the customer identification

Queue ID – the column in the Table which values will be used as identifier for queue assignments.

Queue Assignments

Database Value – the different values stored in the Queue ID column

Queue - the destination queue

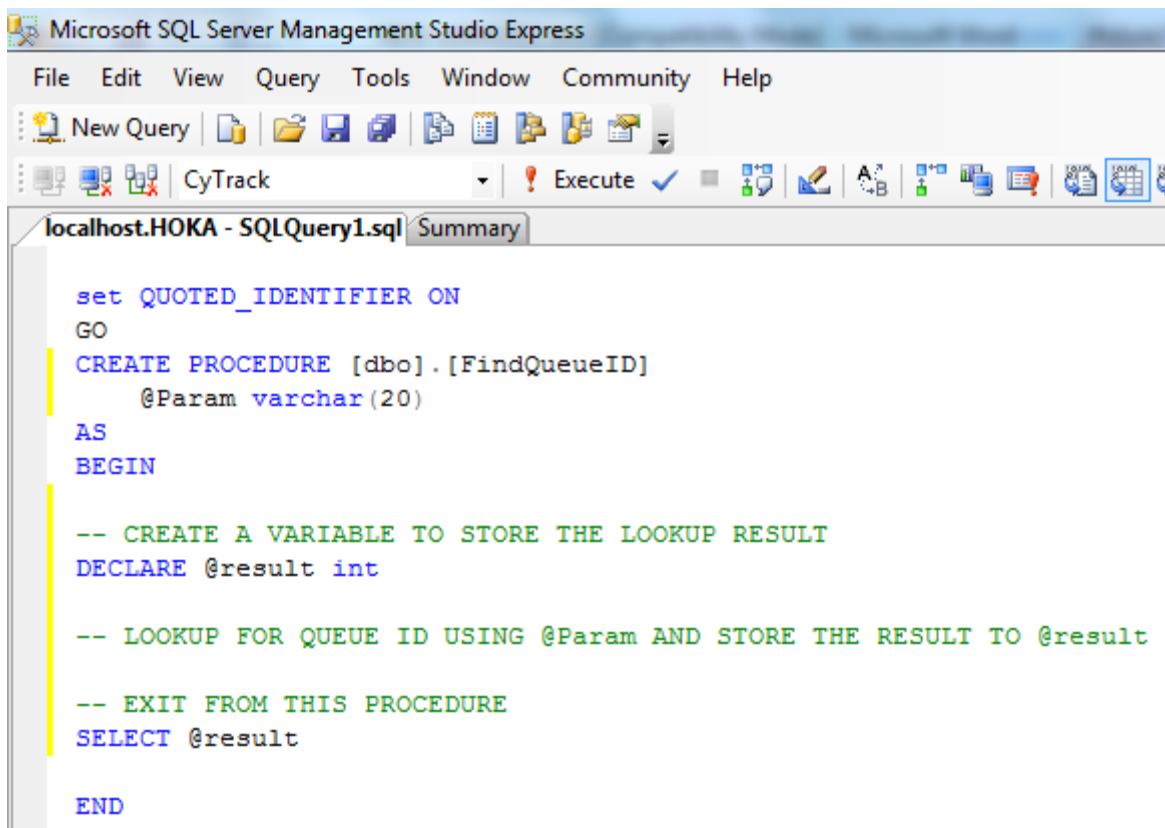
Example:

All customers that have been marked as BLACKLIST must never be answered.

6.1.9.3 Stored Procedure

This mode integrates to a Microsoft SQL Server via the ODBC profile configured in the ODBC tab. Please consult *CCS Desk Manager – ODBC Section 2.9.26* for more information.

A stored procedure that accepts the caller number as a text input, and returns the queue ID as an integer as the result. Tools such as Microsoft SQL Server Studio Express can be used to create the stored procedure.



```
Microsoft SQL Server Management Studio Express
File Edit View Query Tools Window Community Help
New Query
CyTrack Execute
localhost.HOKA - SQLQuery1.sql Summary
set QUOTED_IDENTIFIER ON
GO
CREATE PROCEDURE [dbo].[FindQueueID]
    @Param varchar(20)
AS
BEGIN
    -- CREATE A VARIABLE TO STORE THE LOOKUP RESULT
    DECLARE @result int
    -- LOOKUP FOR QUEUE ID USING @Param AND STORE THE RESULT TO @result
    -- EXIT FROM THIS PROCEDURE
    SELECT @result
END
```

Caller Lookup Profile

Name: DB Lookup

Lookup Mode: Stored Procedure

ODBC Profile: [Empty]

Use Default Queue if no Match:

Default Queue: [Empty]

Stored Procedure: [Empty]

The stored procedure must accept the phone number as the single input and return the Queue ID as an integer value in the first column

OK Cancel

M0148

ODBC Profile – the ODBC integration profile configured in CCS Desk.

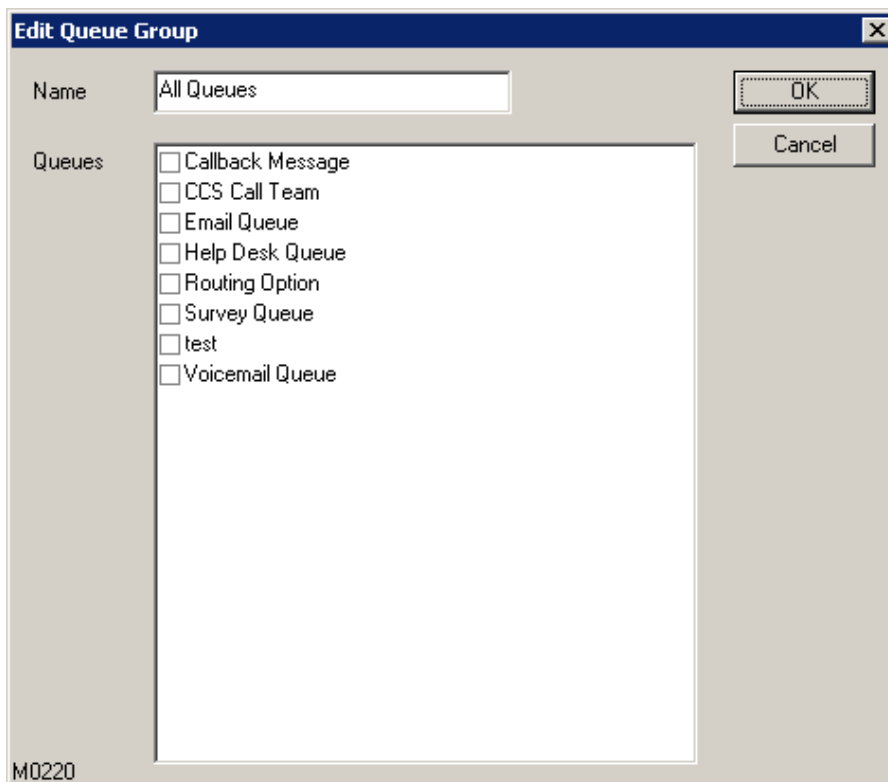
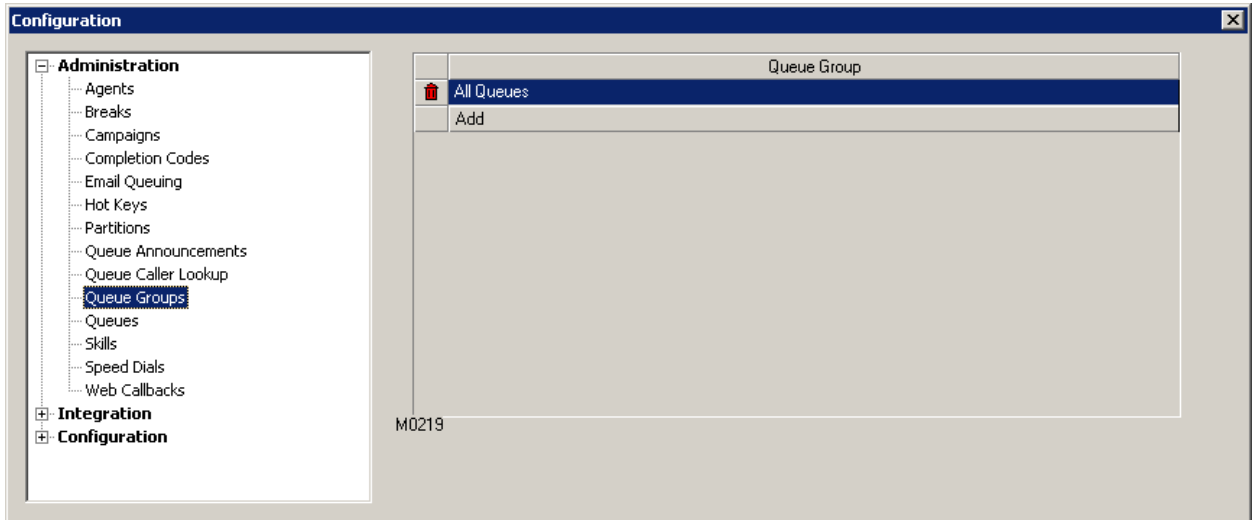
Stored Procedure – the name of the procedure.

Default Queue if No Match – when enabled, the system will route the call to the default queue when the stored procedure fails to find a match or returns an error.

Default Queue – where the call will be routed to when the lookup returns zero match.

6.1.10 Queue Groups

Queues can be grouped together for reporting to provide an overview. The call centre queue group combines the Inbound and outbound queues statistics. A new group can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



6.1.11 Queues

The Queues tab in CCS Desk Manager is used to add, remove and configure queues for CCS Q. There are several types of queue, and each queue type also has different set of tabs available for configuration:

- Auto Attendant

Purpose

Play greeting files and provide information / options to callers.

Tabs

- General
- Schedule
- Announcements
- Overflow
- Other

- Queue

Purpose

Transfer queued voice calls / chat requests to agents, and to keep callers on hold while the agents are busy.

Tabs

- General
- Agents
- Skills
- Schedule
- Announcements
- Completions
- Overflow
- Other

- Callback Message

Purpose

Take callers' return phone number and voice message to be called back with the Callback in Queue.

Tabs

- General
- Schedule
- Announcements
- Other
- Messages

- CCS Call Team

Purpose

Transfer campaign calls to available agents. Similar to Queue, however, there is no announcement (except to select the pre-emptive dialer server) or overflow option.

Tabs

- General
- Agents
- Skills
- Schedule
- Announcements
- Other

- Routing Options

Purpose

Very similar to Auto Attendant, but it also has access to configure a more complex announcement options with its Routing tab.

Tabs

- General
- Schedule
- Announcements
- Overflow
- Other
- Routing

- Email

Purpose

Transfer incoming emails to available agents. There is no announcement or overflow option.

Tabs

- General
- Agents
- Skills
- Schedule
- Completions
- Other
- Email

- Voicemail

Purpose

Record callers' voice messages and provide notification to agents if necessary.

Tabs

- General
- Schedule
- Announcements
- Overflow
- Other
- Messages

- Survey

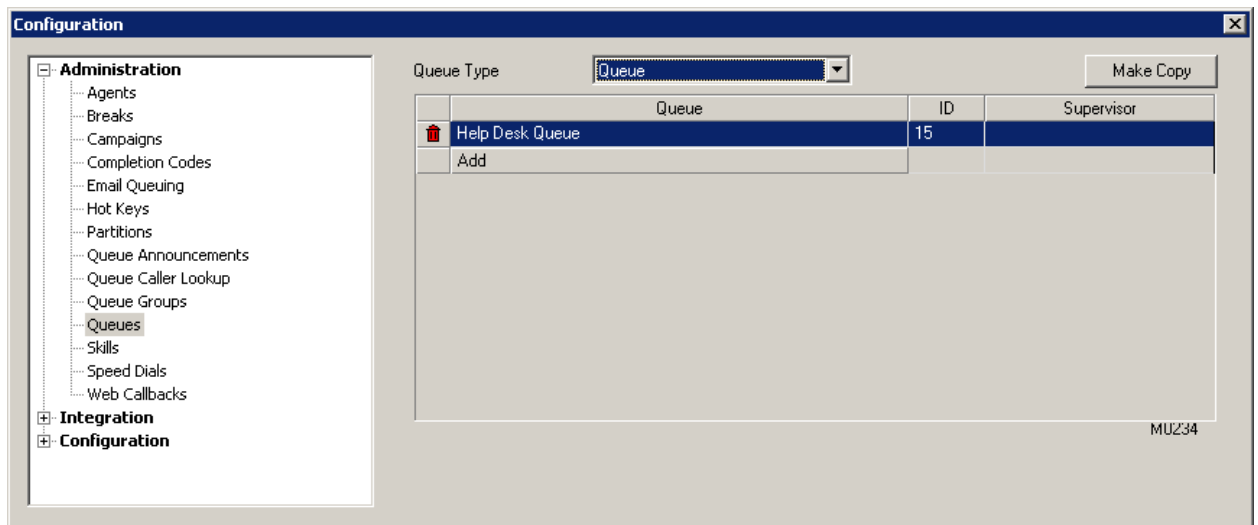
Purpose

Creates a survey wherein at the caller could answer at the end of the call. Also this feature allows the caller to leave a voice message that will be routed to a supervisor and presented with a call-back to the caller.

Tabs

- General
- Announcements
- Other

The Queue Type drop down list allows you to switch from one queue type to another. A new queue for the selected type can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon. By default the list is sorted by queue names in alphabetical order. You can change the sort method of this list by double clicking on the column names.



The next sections explain the configurations in each tab. Note as mentioned above, each queue type has different set of tabs available for configuration, and the options inside each tab may also differ.

A copy of the selected queue can also be made using the 'Make Copy' button.



Existing Queue – The queue selected as the ‘template’.

New Queue Name – The name of the new queue created as a result of this procedure.

Settings to Copy – Choose the settings that should be copied from the existing queue to the new queue.

6.1.11.1 General

The General tab allows the basic configuring of queue distribution and priority of the calls received in the queue.

The screenshot shows a dialog box titled "Configure Queue : Help Desk Queue". It has several tabs: General, Agents, Skills, Schedule, Announcements, Completions, Overflow, and Other. The "General" tab is active. The fields are as follows:

- Queue Name: Help Desk Queue
- Queue Type: Queue
- Supervisor: (empty)
- Incoming Priority: 1
- Increasing by: 1 every 1 seconds
- Ignore Abandoned in Reports
- Min Abandon Time: 15 seconds
- Previous Queue Display
- Previous Queue Skills
- Previous Queue Announcements

Buttons: Links, Change, OK, Cancel. A small text "M0222" is visible in the bottom right corner of the dialog.

Queue Name – Name of the queue.

Links – provide a list of queues that escalates call to this queue, and the overflow rule.

The screenshot shows a small dialog box titled "Queue References". It contains the text "Queue:Help Desk Queue" and "Queues:". There is an "OK" button at the bottom.

Supervisor – The agent responsible for the queue and the Status of the queue. The supervisor is able to see the statistics for the Queue in the CCS Desk Queue Statistics Popup Display even though the supervisor is not assigned as an agent to the Queue.

Queue	Cls	Max	Avg	DMax	Agt	Day	Ab	Pc
Geneva Conferen	1	0:07	0:07	0:30	1	8	4	50%

Incoming Priority – Sets the priority for the incoming calls for the queue. Please note that 0 is the lowest. To ensure that calls in lower priority queues are not ignored during times of high volume in the higher priority queues, we can configure a rate of increase for a Queued calls priority. Thus a low priority call increase until it has the highest call priority, and is answered.

Ignore Abandoned in Reports – When enabled, a call in this queue will never be logged as abandoned.

Min Abandon Time – The minimum time a call must wait in the queue before considered abandoned.

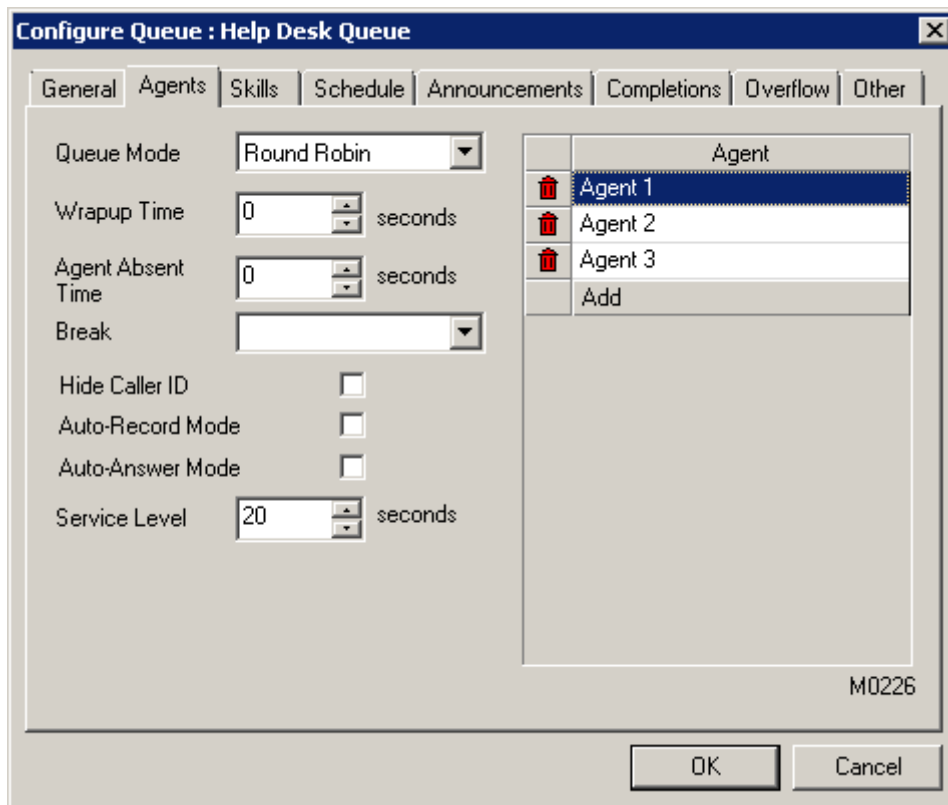
Cascade Queue Display – If the call is overflowed from another queue, use the previous queue's name and completion codes when the call is presented to the agent.

Cascade Queue Skills – If the call is overflowed from another queue, use the previous queue's skill based routing configuration to distribute the call to the available agent.

Cascade Queue Announcements – If the call is overflowed from another queue, use the previous queue's announcement messages and settings while the call is waiting in the queue.

6.1.11.2 Agents

The Agents tab is where the agents that will receive the calls can be assigned into the queue. A new agent can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon. If skills based routing is used, only the agents with the available skills can be added to the queue.



Queue Mode – the call distribution mode. There are 5 available options on how the calls will be distributed.

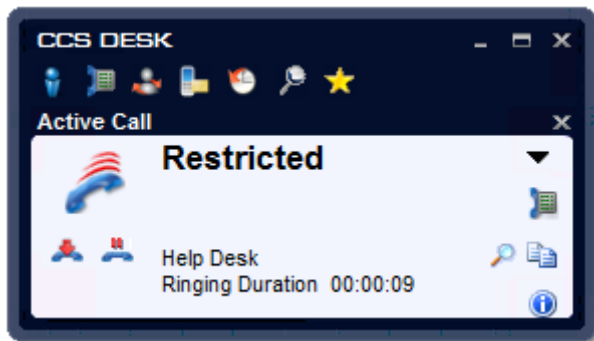
- **Round Robin** – Calls are distributed in a circular fashion.
- **Longest Available** – The agent who has had the freest time will receive the next call.
- **Last New Call** – Sends the call to the agent who most recently finished a call.
- **Shortest Available** – The opposite of Longest Available.
- **Least Talk-Time** – Distributes calls to agents who have had least proportion of time on the phone.

Wrapup Time – The amount of time given to the agent after finishing a call from this queue.

Agent Absent Time – The time the system allows a call to ring at the agent's phone before it is routed to another agent, and the previous agent is automatically logged out for not answering the queued call.

Absent Break Type – The break status placed to the agent when absent to answer a call into the queue.

HideCaller ID – Prevents the display of the Caller ID on the Call Window in the CCS Desk Client.



Auto-Record Mode – Forces call recording to start when the call is answered by the agent.

Auto-Answer Mode – Forces the call to be answered on the first ring.

Service Level – Sets the workflow service level of the agent from this queue.

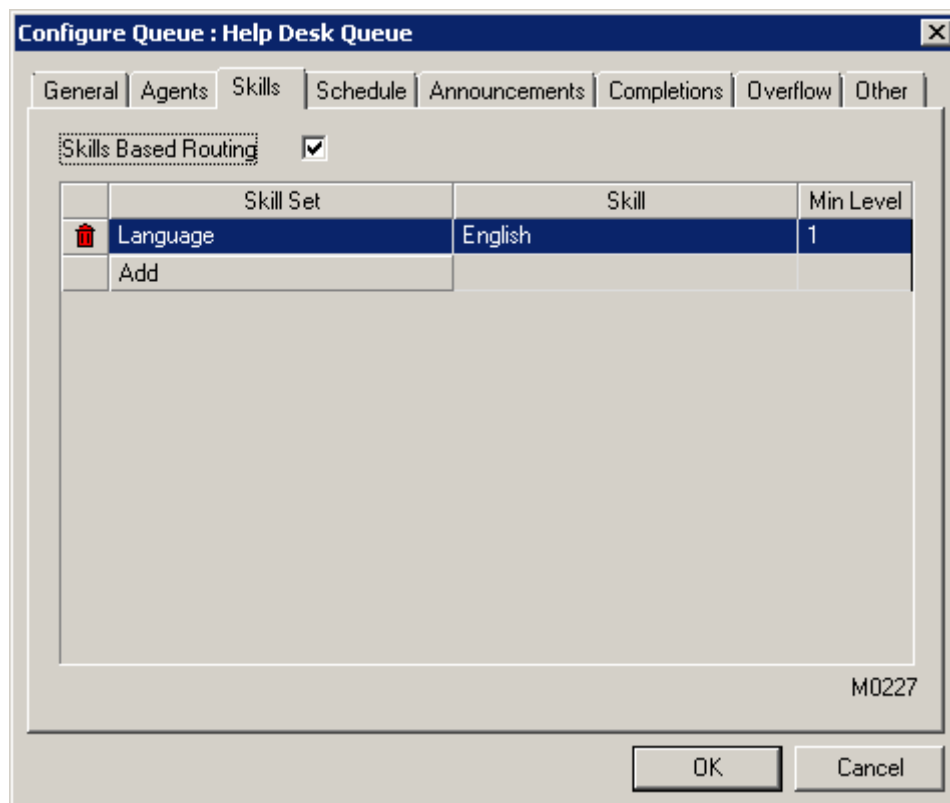
6.1.11.3 Skills

The Skills tab allows the skills based routing feature to be enabled for call distribution. If skills based routing is used, only the agents with the available skills can be added to the queue. Skills based routing has higher priority compared to the queue distribution mode configured in the General queue.

Skills based routing works by checking the skill level that Agents are assigned and then routes the call to the agent with the highest skill level available.

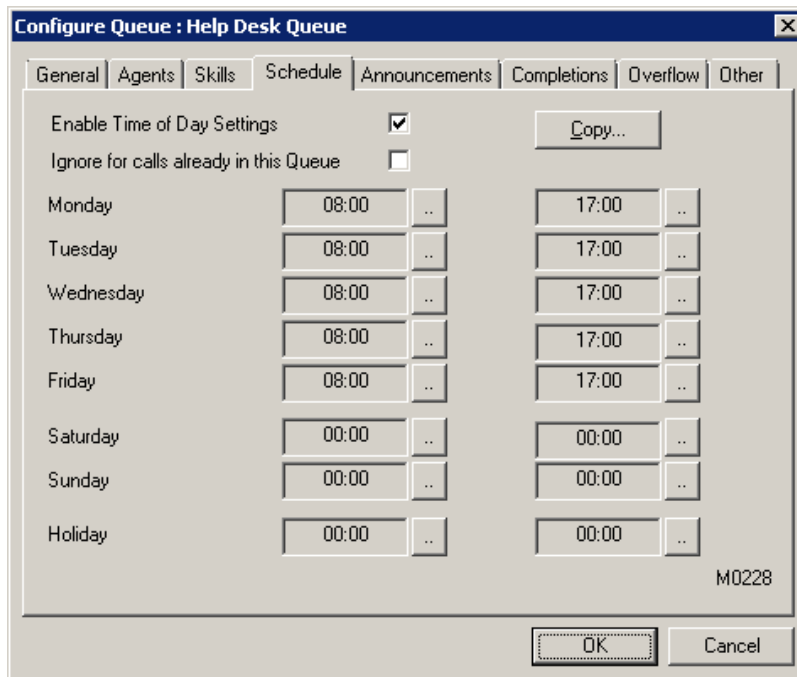
For example, agent A has a skill level of 1 for Sales queries, agent B has a skill level of 2 and agents C and D have a skill level of 3. Any Sales calls would be first routed to agents C and D (based on the queue distribution mode in the General tab). If they are unavailable then they will then be routed to agent B, and if agent B is unavailable the call will go to agent A.

Skills can be assigned to the queue by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.

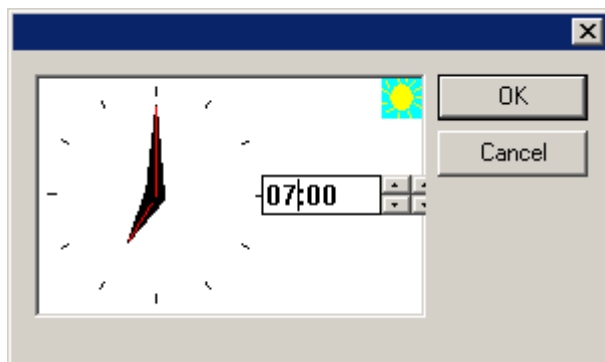


6.1.11.4 Schedule

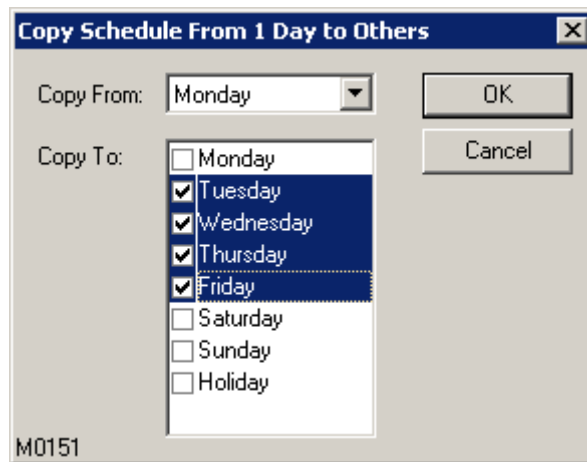
The Schedule tab controls the time period for the queue is active. If 'Enable Time of Day Settings' is checked then the queue will be enabled, and accept calls during the times set in the schedule. Further configuration on the Overflow tab determines what happens to calls outside the times the queue is active. The times are in 24 hour format.



Click on the button to the right of the time field and the clock tool will pop-up. Select your time and click OK.



Schedule can also be copied from a day to another by using the 'Copy' button.



Ignore for calls already in this Queue – calls already waiting in the queue will not be overflowed when the time has exceeded the active schedule of the queue.

6.1.11.5 Announcements

The 'Announcements' tab configures the order and duration of announcements made to callers while they are in the queue, as well as the call routing options.

The screenshot shows the 'Configure Queue : Help Desk Queue' dialog box with the 'Announcements' tab selected. The 'Enable Announcements(Q0015)' checkbox is checked. The 'Server' dropdown is empty. The 'Announcement Type' is set to 'Simple Message'. The 'First Announcement Must Be Played' checkbox is unchecked. The 'Inter-Announcement Delay' is set to 30. The 'Third Announcement Interval' is set to 0. The 'Queue Identifier (In-Band)' is empty. The 'First Announcement' dropdown is set to 'First Announcement'. The '0 ->' dropdown is set to 'Disabled'. The '1 ->' dropdown is set to 'Disabled'. The '2 ->' dropdown is set to 'Disabled'. The '3 ->' dropdown is set to 'Disabled'. The '4 ->' dropdown is set to 'Disabled'. The '5 ->' dropdown is set to 'Disabled'. The '6 ->' dropdown is set to 'Disabled'. The '7 ->' dropdown is set to 'Disabled'. The '8 ->' dropdown is set to 'Disabled'. The '9 ->' dropdown is set to 'Disabled'. The 'OK' and 'Cancel' buttons are at the bottom. The text 'All recordings must be 11KHz 8-bit Mono wav files' is at the bottom left. The text 'M0229' is at the bottom right.

Enable Announcements – the checkbox must be ticked to enable announcements.

Server – The announcement server that will service calls into the queue.

Announcement Type – Determines what will be announced.

- **Queue Position** – Plays the first announcement using the queue's greeting1, followed by repeat and third announcements of the call's position in the queue.
- **Simple Message** – Plays the queue's greeting1, greeting2, and greeting3 files for the queue announcements.
- **Wait Time** – The same as Queue Position but also announces the expected wait time at the end of greeting1 first announcement.

First Announcement Must Be Played – Ensures the First announcement is played to the caller even if an agent is already available to take the call.

Inter-Announcement Delay – The time delay between announcements in seconds. The Hold music for the queue will be played in between each announcement.

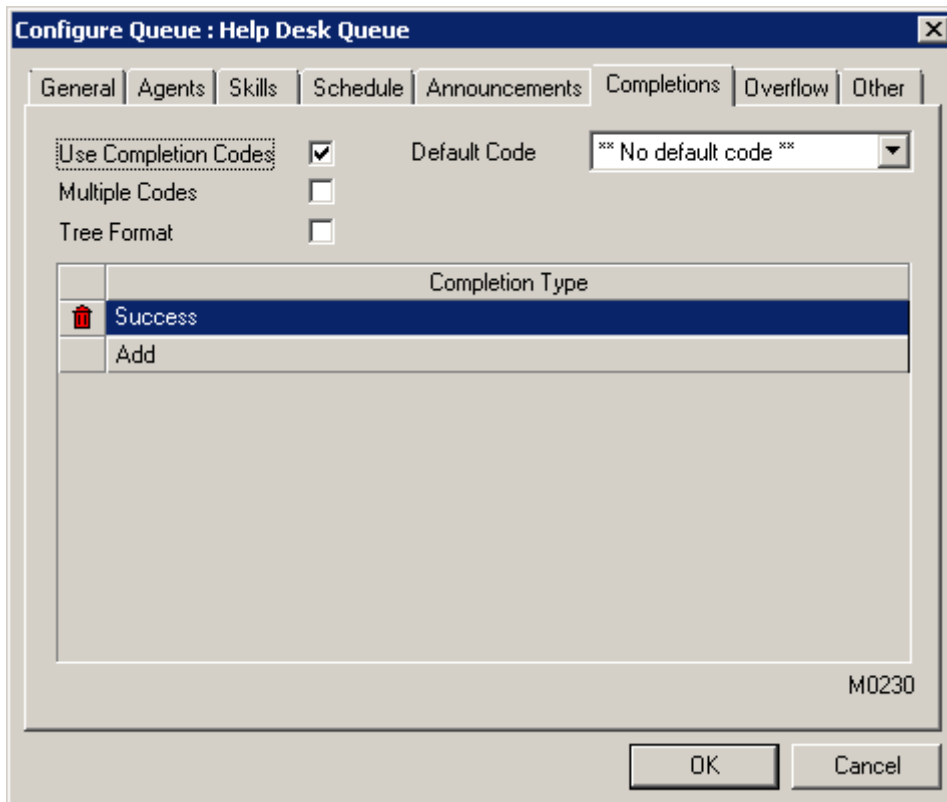
Third Announcement Interval – Used only if a third announcement needs to be played. This is the frequency of how often the 3rd announcement (GREETING3) is played instead of GREETING2. If the value is set to 4, the order of the greetings would be 1,2,2,2,3,2,2,2,3

Queue Identifier (In-Band) – When using in-band signalling integration, this value serves as the queue identifier matched against the in-band data received.

Call Routing – During the announcement the caller can be prompted to press a digit to indicate a selection of a service. The calls can then be routed to the Appropriate Queue. In the Screenshot we can see that if the caller presses 0 during the first announcement, it will be routed into the NIGHT MSG queue. Note that the pull-down menu on the top of the screen allows us to configure different options for each of the Announcements.

6.1.11.6 Completions

After a queued call has been completed, CCS Desk can be configured so the agent is required to enter a completion code. Codes can be assigned to the queue by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Use Completion Codes – tick to enable this feature.

Multiple Codes – Multiple codes to be entered for one call when this option is enabled.

Tree Format – If codes exist which have a '–' in the name, they will be displayed in a tree format.

6.1.11.7 Overflow

In this tab we configure how the queued calls will overflow under certain conditions i.e. when the queue is disabled, or no agents are available. The queue can overflow to another queue, a number, a registered device in CCS Desk, the CCS IVR service, the Caller Lookup service, or simply Hangup the call. When overflow is disabled, the calls in the queue will stay in the queue until it is answered or abandoned.

Overflow Type	Value	Destination
Queue Disabled (Outside of Hours)		Queue:Voicemail Queue
Holiday Mode (Outside of Hours)		Queue:CCS Call Team
No Agents Logged In		Disabled
Max Time in Queue	0	Disabled
Max Calls in Queue	0	Disabled
Agent : Call Ratio	0	Disabled
Emergency Mode Transfer to Queue		Disabled

M0231

OK Cancel

Queue Disabled (Outside of Hours) – When the call arrives outside the schedule specified in the Schedule tab.

Holiday Mode (Outside of Hours) – On a holiday, when the call arrives outside the schedule specified in the Schedule tab.

No Agents Logged in – When no agents are logged into CCS Desk. Agents on break are also considered logged out.

Max Time in Queue – Sets the time in seconds for how long the call remains in the queue, and where to route once the time exceeds.

Max Calls in Queue – The maximum number of calls allowed in the queue before subsequent calls are overflowed.

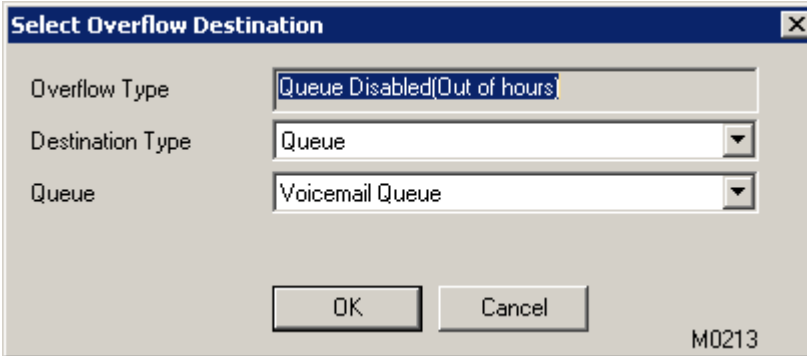
Agent : Call Ratio – If the ratio of logged in agents to calls is too high, the calls will be overflowed. With the value of 4, for every 1 agent logged in to the queue, the system will allow 4 calls to wait in the queue and the subsequent calls are overflowed.

Emergency Mode Transfer to Queue – When the system is put into emergency mode.

6.1.11.7.1 Destination Type

Each overflow type can be directed towards the following destinations.

Queue



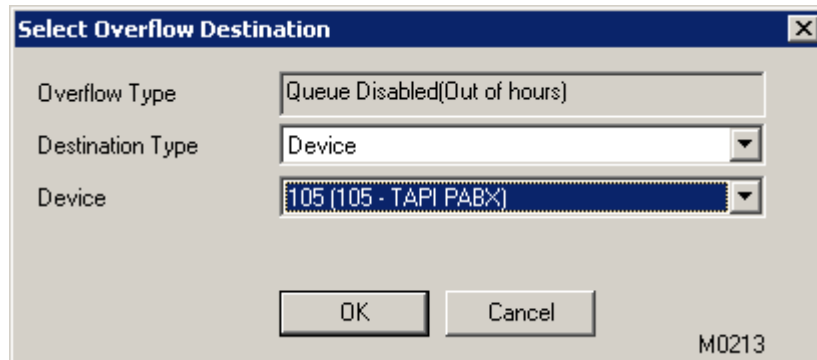
The screenshot shows a dialog box titled "Select Overflow Destination". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog contains three input fields:

- Overflow Type:** A text input field containing the text "Queue Disabled/Out of hours".
- Destination Type:** A dropdown menu with "Queue" selected.
- Queue:** A dropdown menu with "Voicemail Queue" selected.

At the bottom of the dialog, there are two buttons: "OK" and "Cancel". In the bottom right corner, the text "M0213" is displayed.

Queue – Select from one of the queues in the system.

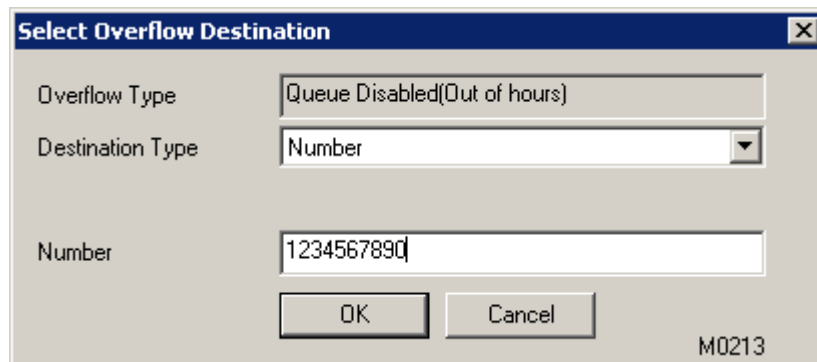
Device



The screenshot shows a dialog box titled "Select Overflow Destination" with a close button (X) in the top right corner. It contains three fields: "Overflow Type" with the value "Queue Disabled(Out of hours)", "Destination Type" with a dropdown menu set to "Device", and "Device" with a dropdown menu set to "105 (105 - TAPI PABX)". At the bottom, there are "OK" and "Cancel" buttons, and the identifier "M0213" is located in the bottom right corner.

Device – Select from one of the registered devices in the system.

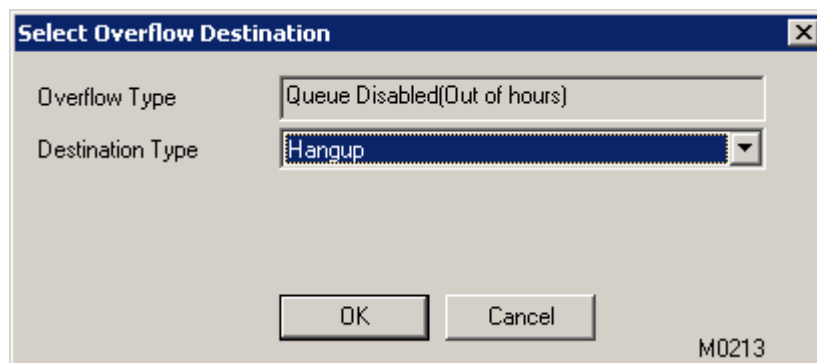
Number



The screenshot shows a dialog box titled "Select Overflow Destination" with a close button (X) in the top right corner. It contains three fields: "Overflow Type" with the value "Queue Disabled(Out of hours)", "Destination Type" with a dropdown menu set to "Number", and "Number" with a text input field containing "1234567890". At the bottom, there are "OK" and "Cancel" buttons, and the identifier "M0213" is located in the bottom right corner.

Number – Manually enter any number.

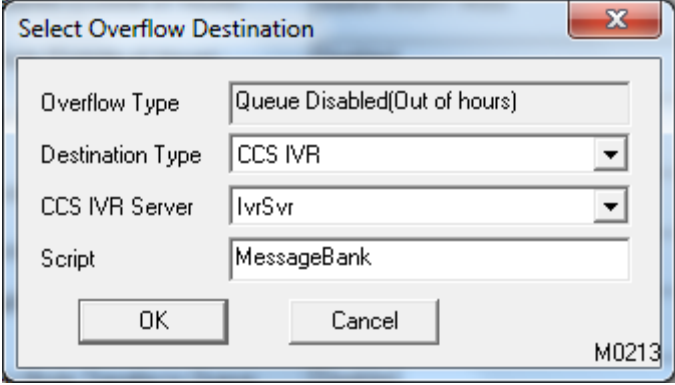
Hangup



The screenshot shows a dialog box titled "Select Overflow Destination" with a close button (X) in the top right corner. It contains three fields: "Overflow Type" with the value "Queue Disabled(Out of hours)", "Destination Type" with a dropdown menu set to "Hangup", and "Number" which is empty. At the bottom, there are "OK" and "Cancel" buttons, and the identifier "M0213" is located in the bottom right corner.

It simply disconnects the call.

CCS IVR

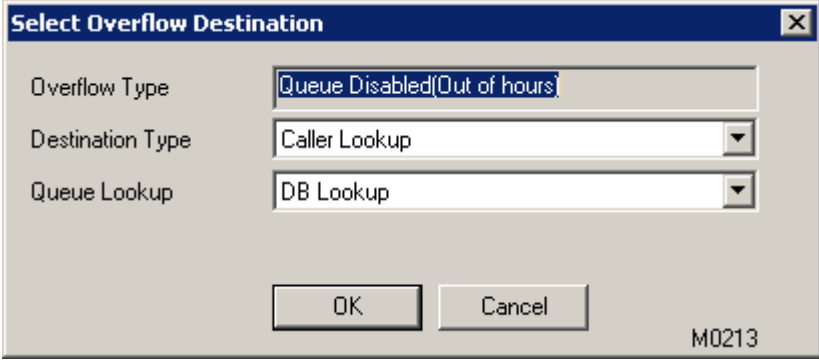


The screenshot shows a dialog box titled "Select Overflow Destination" with a close button (X) in the top right corner. It contains four input fields: "Overflow Type" with the text "Queue Disabled(Out of hours)", "Destination Type" with a dropdown menu showing "CCS IVR", "CCS IVR Server" with a dropdown menu showing "IvrSvr", and "Script" with the text "MessageBank". At the bottom, there are "OK" and "Cancel" buttons, and the identifier "M0213" in the bottom right corner.

CCS IVR Server – the name of the CCS IVR integration profile. *Please consult Section 6.3.5 CCS IVR for more information.*

Script – the name of the CCS IVR script to use.

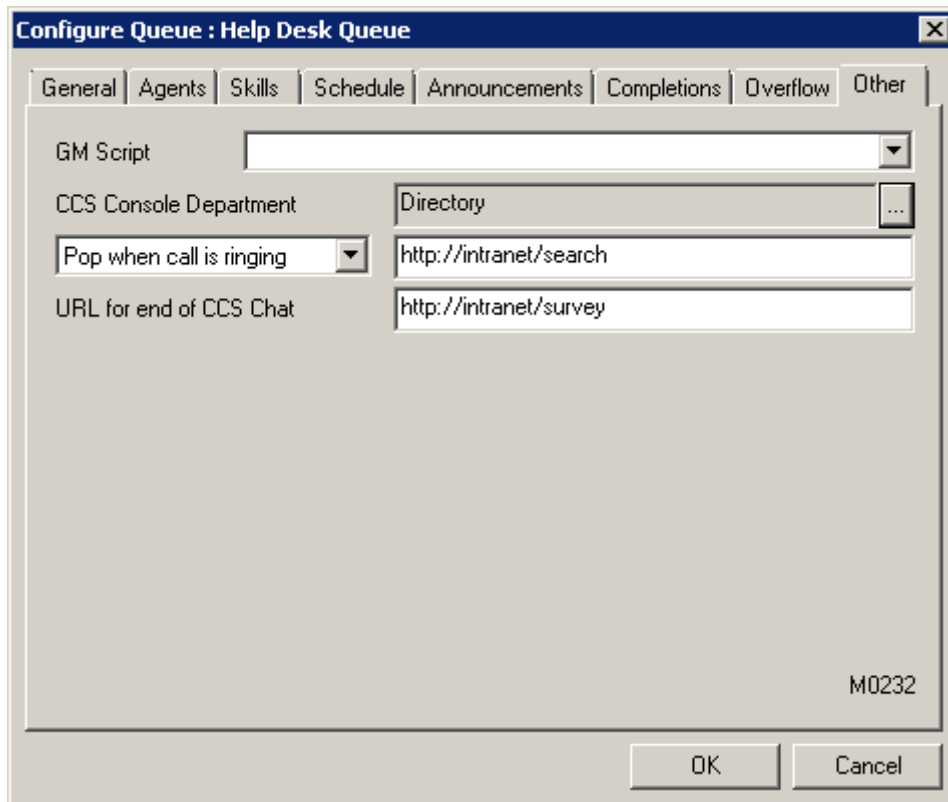
Caller Lookup



The screenshot shows a dialog box titled "Select Overflow Destination" with a close button (X) in the top right corner. It contains three input fields: "Overflow Type" with the text "Queue Disabled(Out of hours)", "Destination Type" with a dropdown menu showing "Caller Lookup", and "Queue Lookup" with a dropdown menu showing "DB Lookup". At the bottom, there are "OK" and "Cancel" buttons, and the identifier "M0213" in the bottom right corner.

Queue Lookup – the name of the caller lookup profile. *Please consult Section 6.1.9 Queue Caller Lookup.*

6.1.11.8 Other



GM Script – If CCS Desk is integrated with GoldMine, a GoldMine script can be used when a call is answered from the queue. To select a script click on the pull-down menu and highlight the desired script.

CCS Console Department- When CCS Console is used by the CCS Q agent, the screen pop can be configured to show a specific department. The selection for department is taken from the list of departments configured in the CCS Report directory.

Pop URL – The configured URL will be displayed whenever a call from that queue is ringing or answered by an agent. This feature happens independently of any CRM integration that may be configured. There are 4 'variables' that can be used e.g.
`http://intranet/search?ph={NUMBER}`

{NUMBER} – The phone number of the incoming call

{ACCOUNTNO} – The ID of the contact, if known (requires Database integration).

{CONTACT} – The name of the caller, if known (requires Database integration).

{COMPANY} – The company name of the caller, if known (requires Database integration).

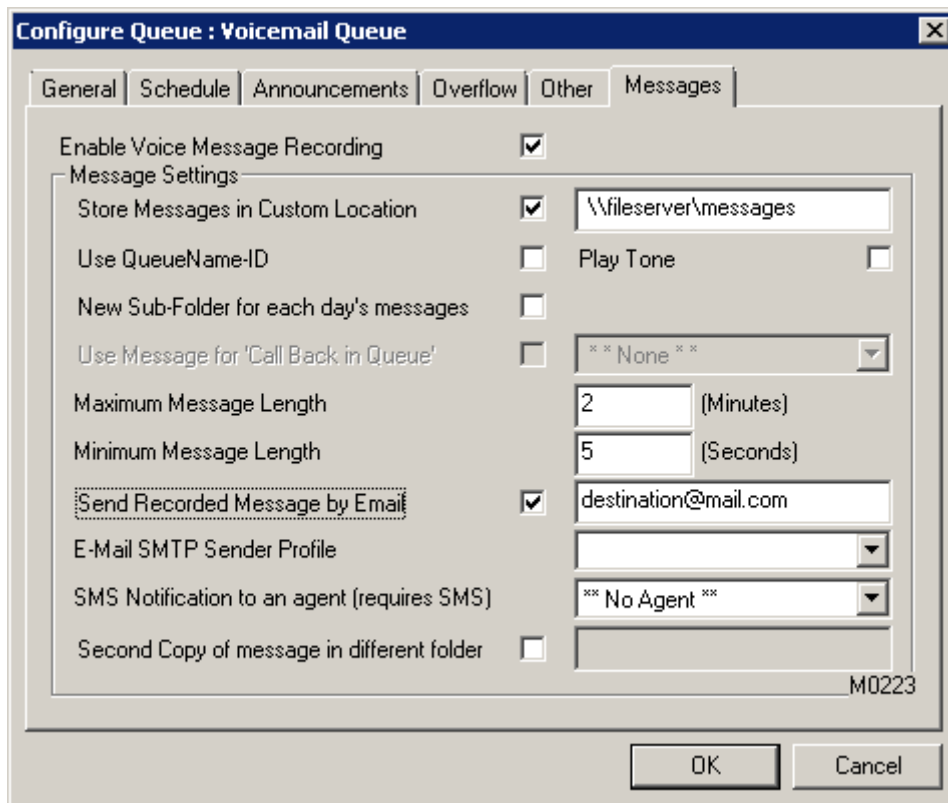
{QUEUEID} – The ID of the queue, if it is a CCS Q related call.

{EMAIL} – The sender's email address, when using CCS Q email queuing.

URL for end of CCS Chat – Similar to Pop URL but specifically for CCS Chat session routed through the queue.

6.1.11.9 Messages

A queue can be utilized to record voice messages or make callback requests. The audio file can be copied to a network folder that can be accessed the users. An email notification can be sent with the audio file attached. SMS notification requires CCS SMS.



Enable Voice Message Recording – when enabled, the queue will activate the message recording feature.

Store Messages in Custom Location – By default, the recorded messages will be stored in the folder belonging to the queue e.g. C:\CCS Ann\Q0001 for the first queue. If the Custom Location is specified, the recorded messages will be stored there. Proper folder security settings must be applied to ensure our system can write into it.

Use QueueName-ID – When enabled, the filename of the messages will simply be QueueName-ID e.g. CALL CENTER-1. With this option not ticked, the filename will contain date and time of the call and caller number when present e.g. 2012-01-01 12345678

Play Tone – Enables a short tone to be played to advise the start of the recording.

New Sub-Folder for each day's messages – This option will create a sub folder for each day's messages e.g. C:\CCS Ann\Q0001\2012-01-11 for the 11th January 2012.

Use Message for 'Callback in Queue' – When enabled, a message recording can be sent to a campaign (**Campaign type: Callback**) for the next agent.

Maximum Message Length – This is the maximum length for a recorded message, in minutes. Once this is reached the recording will stop and the call will be ended automatically.

Minimum Message Length – If the duration of a message recorded is less than this setting, it will be discarded.

Send Recorded Message by Email – The recording will be sent as an email attachment to the specified email recipient.

E-mail SMTP Sender Profile – The SMTP profile to use when sending the email. Please consult *CCS Desk Manager – SMTP* Section 2.9.33 for more information

SMS Notification to an agent – When this option is enabled and an agent is selected has a mobile number configured in the agent's profile, an SMS will be sent to that agent to inform that a message has been recorded. This feature requires CCS SMS.

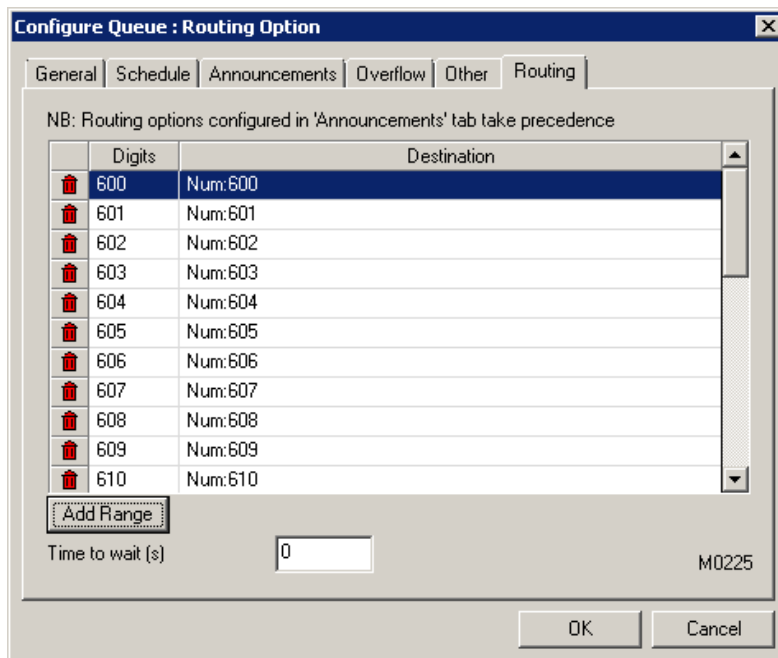
Second Copy of message in different folder – A copy of the recording can be made into another specified folder. The ‘New sub-folder for each day’ option also affects this option.

For simple message recording feature, greeting1 will be required and the recording will start once greeting1 ends. Ideally greeting1 announces that the caller is asked to leave a message.

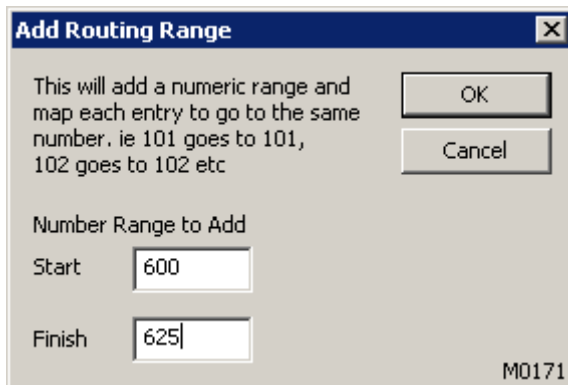
For callback with message recording, greeting1 and greeting2 are both required. Greeting1 must ask to enter the return phone number ended with the ‘#’ key. Greeting2 announces the caller to leave a message.

6.1.11.10 Routing

A more complex routing options can be defined in the Routing tab e.g. multiple digits, transfer to a registered device / number / CCS IVR service / Caller Lookup service etc. Note that the routing options configured in the Announcements tab have higher priority than the ones specified here. The routing options configured in the Routing tab are enabled for all announcement types.



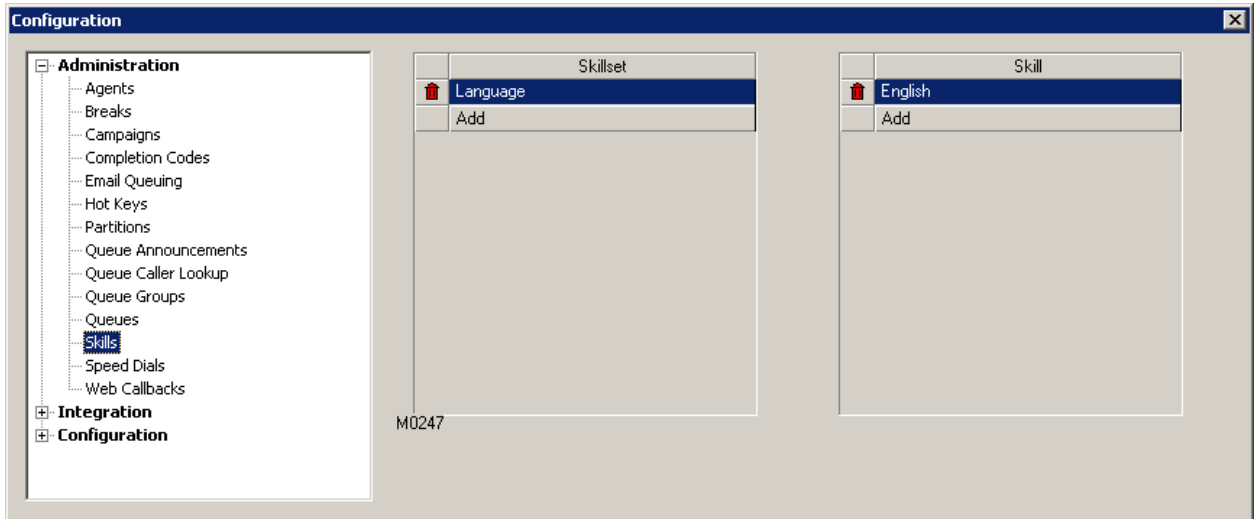
The 'Add Range' button can be used to add a range of numbers to quickly produce a directory service e.g. so caller can directly enter the extension number of the person they wish to speak to.



6.1.12 Skills

The Skills tab is used to configure the necessary skills that Agents require to take phone calls from certain queues. The left hand side lists the available skill sets and the right hand side displays the skills belonging to the selected skill set.

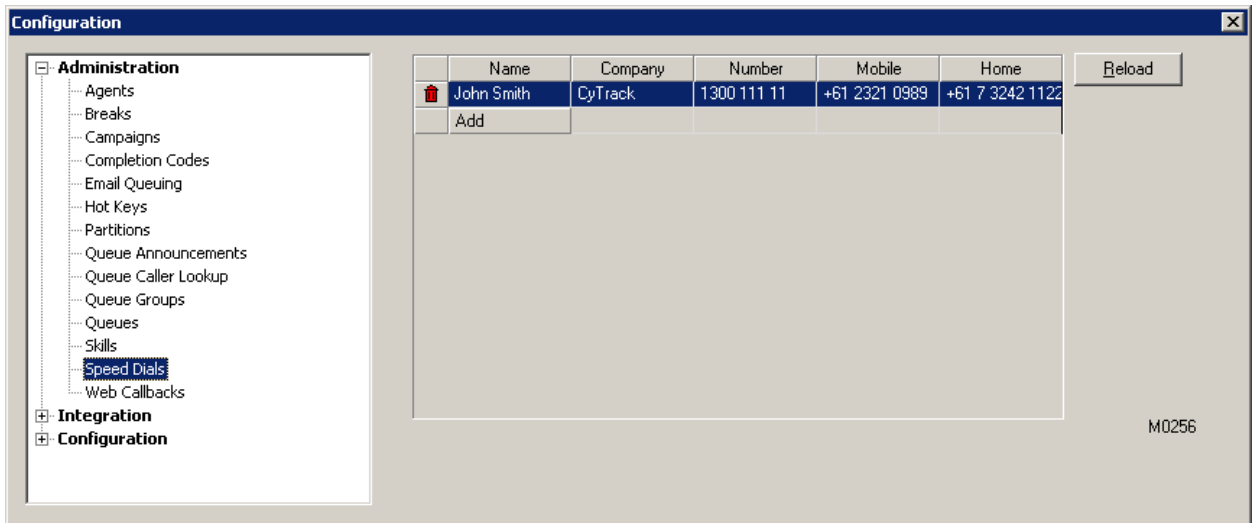
A new skill set and skill can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



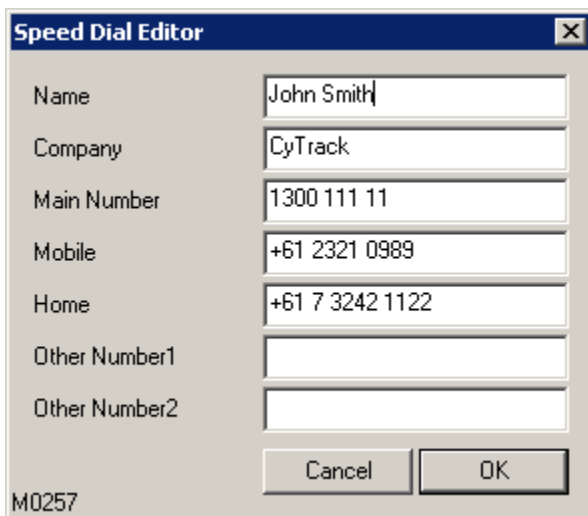
Once finished, assign the skills to Agents and Queues by using their respective tabs.

6.1.13 Speed Dials

CCS Desk includes functionality for providing a list of speed dials that are available to and shared by all agents. These are managed in the Speed Dials tab in CCS Desk Manager. A new speed dial can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Each speed dial entry can contain up to five numbers, as shown below.



Speed dials entered in this screen will become immediately available to all logged on agents, and any agents that log on in future.

Speed dials can also be entered, using a SQL script, directly into the CCS SQL Database 'ctiSystemSpeedDials' table. The 'Reload' button must be clicked before the agents can see them.

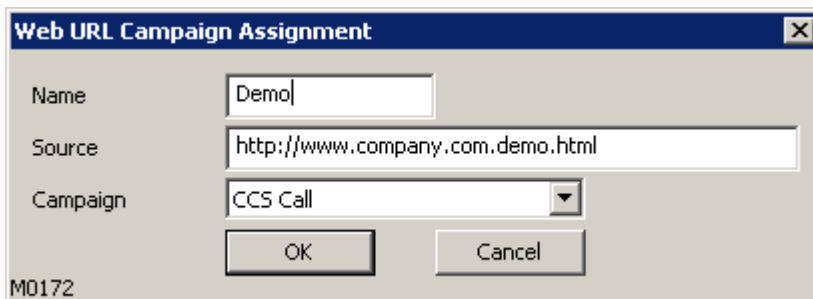
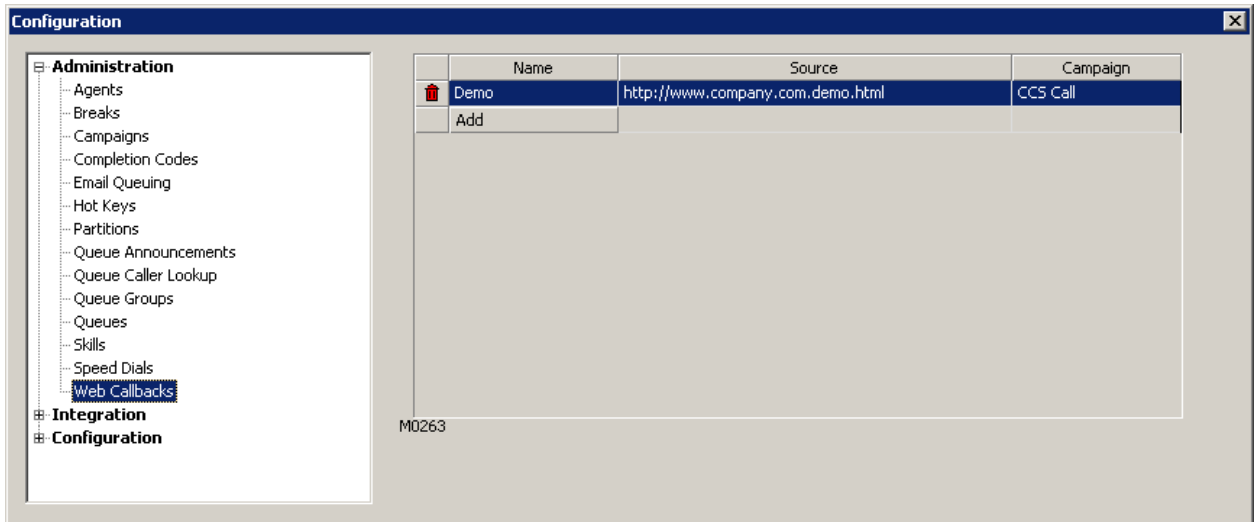
Example SQL script:

```
INSERT INTO ctiSystemSpeedDials (Name, Company, Main Phone, Mobile, Home, Other1, Other2)
VALUES ('John Smith', 'CCS', '+61 7 5553 9800', '+61 4 2321 0989', '+61 7 3242 1122', '', '')
```

6.1.14 Web Callbacks

CCS Q has a 'Web Callback' feature, which enables customers to fill out a form on a web page, which is then converted into an outgoing call request to the customer. This feature requires the deployment of the web callback web service on the company's web server.

Once the 'CCS Q Web Callback Web Service' is installed and configured, the 'Web' tab in CCS Desk Manager needs to be configured to assign sources to campaigns. A new assignment can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Name – Name of the assignment

Source – It is usually the URL of the web page that contained the 'Call Me' button.

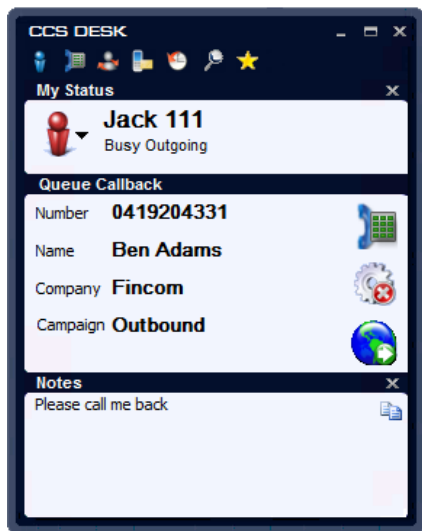
Campaign – the name of the campaign that receives the callback request. (Campaign type: Callback)

CCS Q will use the entries according to their length to get the most accurate match.

E.g. assuming the URL is *http://www.lgericsson.com/* and if there are 2 sources below, number 2 will be used.

- 1) *http://www.lgericsson.com/*
- 2) *http://www.lgericsson.com/products*

When a CCS Q Web Callback call appears in a CCS Call Campaign, the client will display the 'html source' and also any notes that were entered with the callback request.

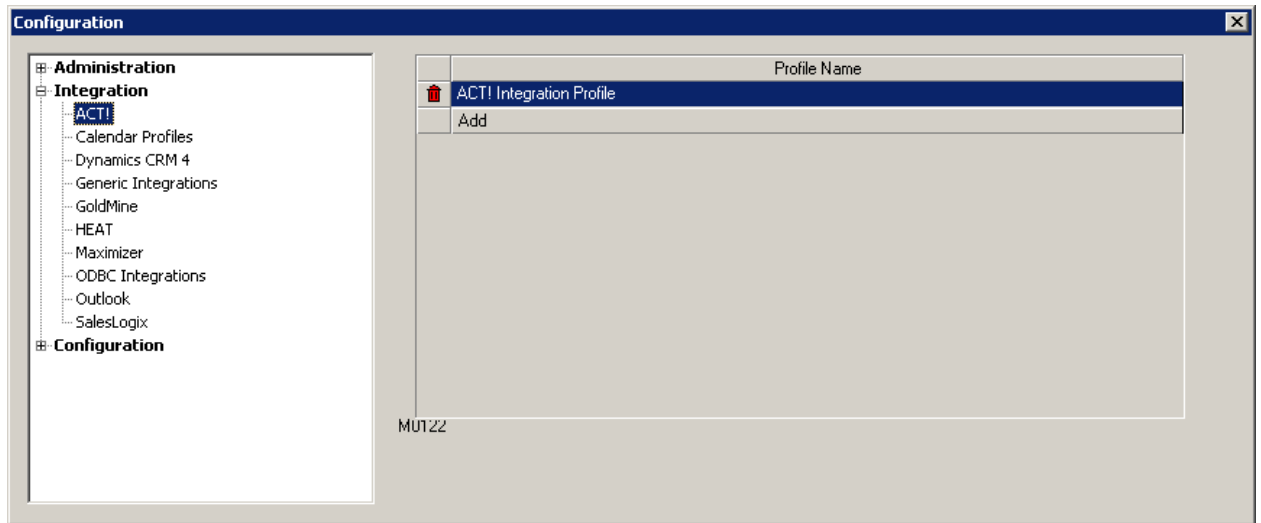


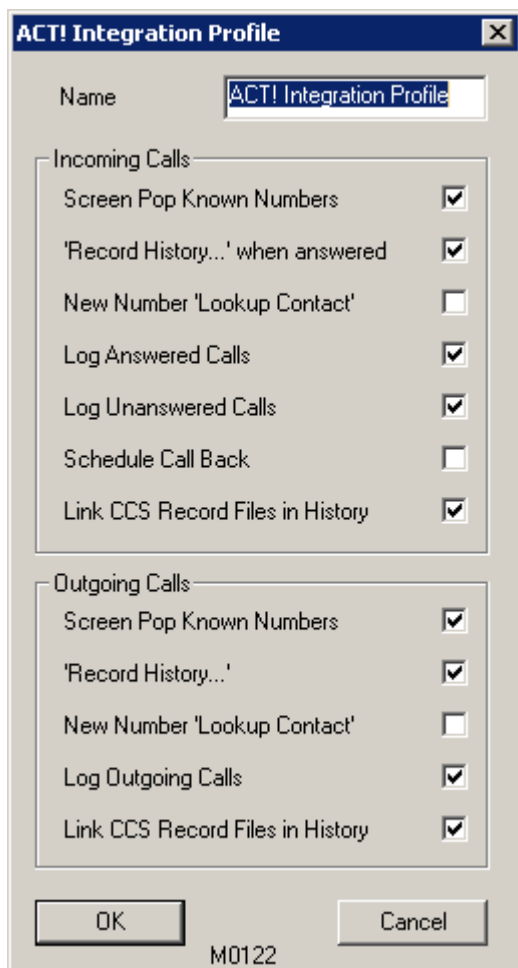
6.2 Integration

6.2.1 ACT!

When CCS Desk is integrated with ACT!, it provides services such as popping a contact record on an incoming call, dialing contact numbers from within ACT! etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The ACT! tab within CCS Desk Manager contains a list of the ACT! integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Incoming Calls

Screen Pop Known Numbers – If the contact's number is found in ACT!, the contact record will be opened in ACT!. The screen pop will not occur if the users current record in ACT! requires saving.

'Record History...' when answered – When an incoming call is answered, the 'Record History...' windows will be opened to allow agent to enter details of the call they are receiving, to be stored in the History for that contact.

New Number 'Lookup Contact' – If the caller cannot be identified, this option will enable ACT! to display the 'Lookup Contact' screen.

Log Answered Calls – Generate automatic entries into the ACT! History for incoming calls that are answered.

Log Unanswered Calls – Generate automatic entries in the ACT! History for incoming calls that are missed.

Schedule Call Back – When enabled, a 'Call' Activity will be scheduled to return the missed call.

Link CCS Record Files in History - When enabled, a link to the call recording file will be added to the ACT! History Tab to allow subsequent playback of the recording.

Outgoing Calls

Screen Pop Known Numbers - If the contact's number is found in ACT!, the contact record will be opened in ACT!

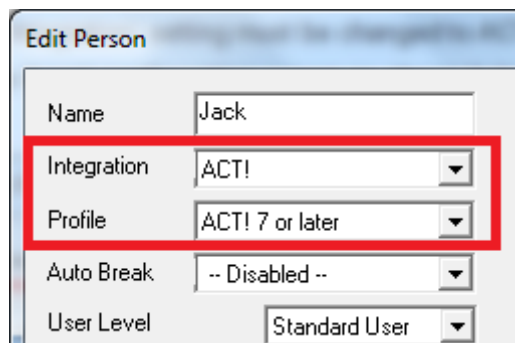
'Record History...' when answered – When the outgoing call is answered, the 'Record History...' windows will opened to allow agent to enter details of the call they are making, to be stored in the History for that contact.

New Number 'Lookup Contact' – If the caller cannot be identified, this option will enable ACT! to display the 'Lookup Contact' screen.

Log Outgoing Calls – Generate automatic entries into the ACT! History for all outgoing calls.

Link CCS Record Files in History - When enabled, a link to the call recording file will be added to the ACT! History Tab to allow subsequent playback of the recording.

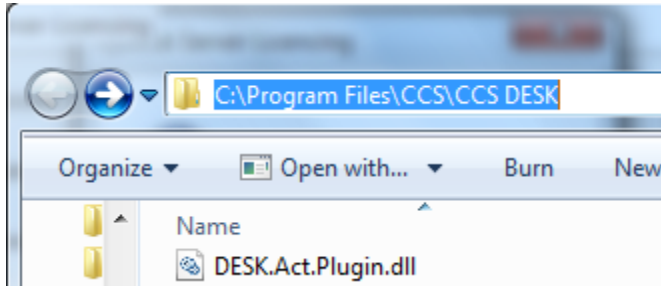
The 'Integration' setting must be changed to *ACT!* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a window titled "Edit Person" with several configuration fields. The "Integration" dropdown is set to "ACT!" and the "Profile" dropdown is set to "ACT! 7 or later". These two fields are enclosed in a red rectangular box. Other fields include "Name" (Jack), "Auto Break" (-- Disabled --), and "User Level" (Standard User).

Both CCS Desk and ACT! must be running for this integration to work.

6.2.1.1 Additional Client Configuration



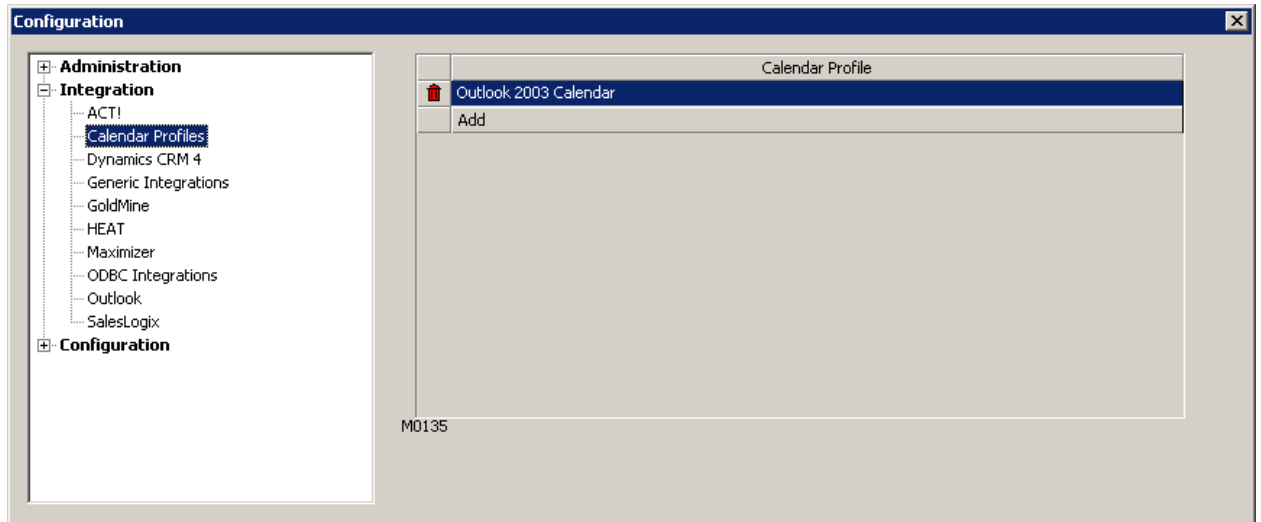
DESK.ACT.Plugin.dll can be found in the installation folder of CCS Desk, and it will need to be manually copied to the Plug-ins folder of ACT to enable the integration. Note that this integration will only work with the .NET Versions of ACT!, i.e. ACT! Version 7, 2005 etc and subsequent versions.

6.2.2 Calendar

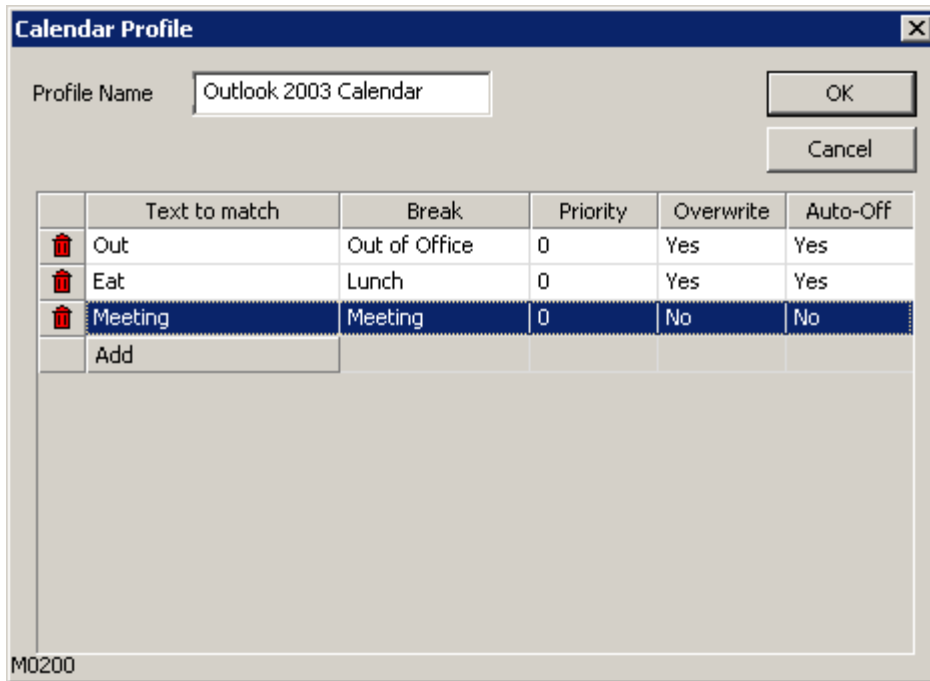
CCS Desk can be configured to set an agents status to a break according to appointments in their Outlook Calendar. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

Currently Outlook is the only calendar application that is integrated.

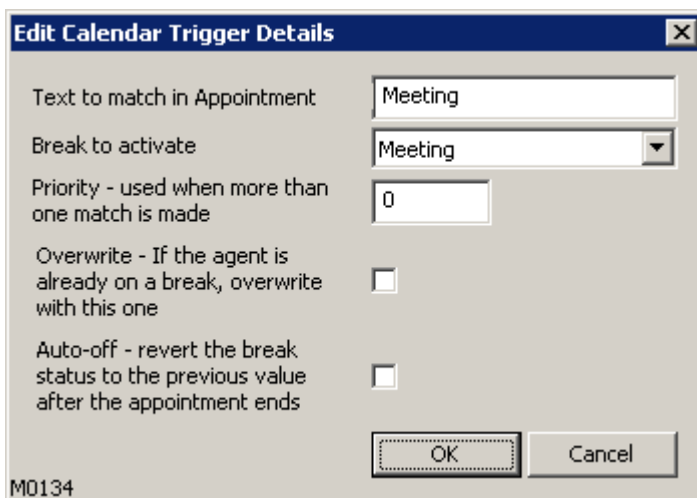
The Calendar tab within CCS Desk Manager contains a list of the Calendar Integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



When a profile is added or edited, the profile displays with a list of entries that can cause an appointment in Outlook to trigger a break in CCS Desk.



Adding or editing a Calendar Trigger will display the Edit Calendar Trigger Details screen as below.



Text to match in Appointment - This text can be anywhere in the text of the subject of the appointment, and is case insensitive. However the search is full-word. For example: *Lunch Meeting* or *With Phil meeting Jim & Pam* would match.

Meetings all day would not cause a match

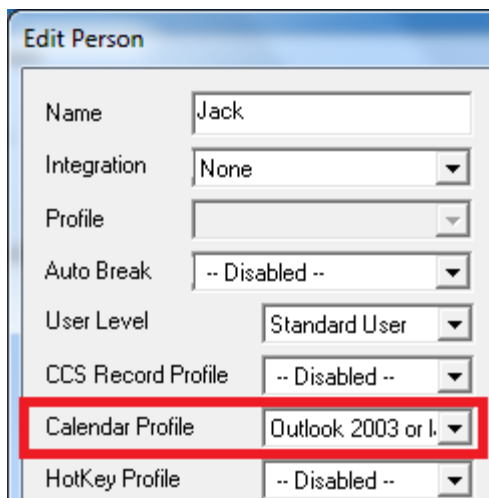
Break to Activate - This is the break that will be activated for the CCS Desk user when the 'Text to match in Appointment' text is found in the appointment subject.

Priority - The priority is used to assist in the situation where more than one match is found, the match with the highest number in the priority field will be used.

Overwrite - If the agent is already on a break when this appointment becomes active, the break will change to the one selected here only if this tick box is ticked.

Auto-off - When the appointment finishes, the user will be taken off a break (or returned to the previous break they were on) only if this tick box is ticked.

Any of the profiles created for Calendar Integration can be selected from the 'Calendar Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a window titled "Edit Person" with the following fields:

Name	Jack
Integration	None
Profile	
Auto Break	-- Disabled --
User Level	Standard User
CCS Record Profile	-- Disabled --
Calendar Profile	Outlook 2003 or l...
HotKey Profile	-- Disabled --

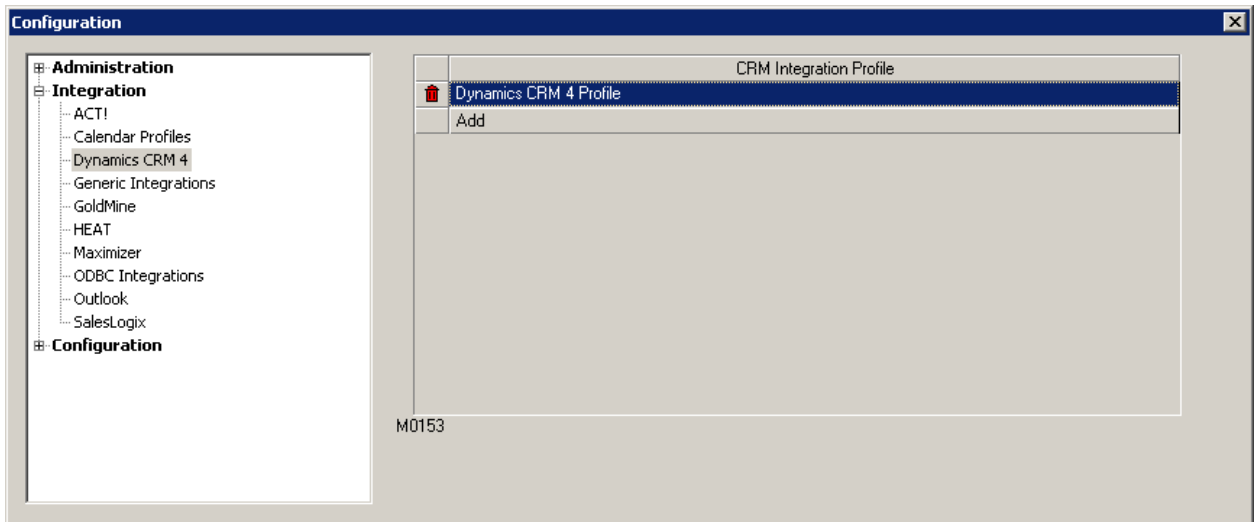
Both CCS Desk and Outlook must be running for this integration to work.

6.2.3 Dynamics CRM 4

When CCS Desk is integrated with Microsoft Dynamics CRM 4, it provides services such as popping a contact record on an incoming call, allowing dialling of contact numbers within MSCRM etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to

agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The MSCRM tab within CCS Desk Manager contains a list of the MSCRM integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Microsoft CRM Integration Profile

Profile Name: Dynamics CRM 4 Profile

CRM Server Name: s://crm:5555

CRM 4.0+

Organisation Name: My Company

Incoming Calls

Call Ringing: Display Contact / Account

Call Answered: Save and display new Phone Call Activit

Auto-Log Incoming External Calls

Auto-Log Incoming Internal Calls

Schedule Call for missed Incoming External

Schedule Call for missed Incoming Internal

Outgoing Calls

Call Dialing: Do nothing

Call Answered: Display 'new Phone Call Activity'

Auto-Log Outgoing External Calls

Auto-Log Outgoing Internal Calls

CCS Record (Voice Recording)

Attach Recording: Do not attach

Custom Phone Fields

Contacts:

Forms

Contact: sfa/conts/edit.aspx

Account: sfa/accts/edit.aspx

Lead: sfa/leads/edit.aspx

Phone Call Activity: activities/phone/edit.aspx

Lead Activity: activities/lead/edit.aspx

CCS IVR Integration

ID Field:

OK Cancel

M0152

CRM Server Name – The MSCRM server host name and port, separated by a colon : sign.

CRM 4.0+ – This box needs to be ticked if integrating to MSCRM 4.0 or later versions.

Organisation Name – The name of the organisation within the MSCRM installation. This is required when the CRM 4.0 checkbox is ticked.

Incoming Calls

Call Ringing – Actions to perform when a new call is ringing.

- **Do Nothing** – The details of the caller will only be displayed in the CCS Desk tooltip.
- **Display Contact / Account** – The MSCRM 'Contact' screen will be opened for the recognized contact.
- **Save and Display new 'Phone Call Activity'** – MSCRM 'Phone Call Activity' screen will be opened. The activity is already saved and linked against the recognized contact.
- **Display new 'Phone Call Activity'** – Unsaved MSCRM 'Phone Call Activity' screen will be opened.

Call Answered – Actions to perform when a new call is answered.

- **Do Nothing** – The details of the caller will only be displayed in the CCS Desk tooltip.
- **Display Contact / Account** – The MSCRM 'Contact' screen will be opened for the recognized contact.
- **Save and Display new 'Phone Call Activity'** – MSCRM 'Phone Call Activity' screen will be opened. The activity is already saved and linked against the recognized contact.
- **Display new 'Phone Call Activity'** – Unsaved MSCRM 'Phone Call Activity' screen will be opened.

Auto-Log Incoming Internal Calls – When enabled, the details of any internal calls received will be automatically logged as completed activities in the history of the associated contact in Microsoft CRM.

Auto-Log Incoming External Calls – When enabled, the details of any trunk calls received will be automatically logged as completed activities in the history of the associated contact in Microsoft CRM

Schedule Call For Missed Incoming Internal Calls – When enabled, all missed internal calls will result in an activity being scheduled to notify the recipient of the missed call.

Schedule Call For Missed Incoming External Calls – When enabled, all missed internal calls will result in an activity being scheduled to notify the recipient of the missed call.

Outgoing Calls

Call Dialing – Actions to perform when a new call is being dialed.

- **Do Nothing** – The details of the caller will only be displayed in the CCS Desk tooltip.
- **Display Contact / Account** – The MSCRM ‘Contact’ screen will be opened for the recognized contact.
- **Save and Display new ‘Phone Call Activity’** – MSCRM ‘Phone Call Activity’ screen will be opened. The activity is already saved and linked against the recognized contact.
- **Display new ‘Phone Call Activity’** – Unsaved MSCRM ‘Phone Call Activity’ screen will be opened.

Call Answered – Actions to perform when a new call is answered.

- **Do Nothing** – The details of the caller will only be displayed in the CCS Desk tooltip.
- **Display Contact / Account** – The MSCRM ‘Contact’ screen will be opened for the recognized contact.
- **Save and Display new ‘Phone Call Activity’** – MSCRM ‘Phone Call Activity’ screen will be opened. The activity is already saved and linked against the recognized contact.
- **Display new ‘Phone Call Activity’** – Unsaved MSCRM ‘Phone Call Activity’ screen will be opened.

Auto-Log Outgoing Internal Calls – When enabled, the details of any internal calls made will be automatically logged as completed activities in the history of the associated contact in MSCRM.

Auto-Log Outgoing External Calls – When enabled, the details of any trunk calls made will be automatically logged as completed activities in the history of the associated contact in MSCRM

CCS Record (Voice Recording)

Attach Recording – Choose the action to perform with call recording file created.

- **Do Not Attach** – Recording is not attached or linked in MSCRM.
- **Attach to Displayed ‘Phone Call Activity’** – Creates a copy of the recording file into the Notes section of the MSCRM ‘Phone Call Activity’ created.
- **Attach to new ‘Phone Call History’** – Creates a copy of the recording file into the Notes section of the auto-log completed activity.
- **Link to Displayed ‘Phone Call Activity’** – Creates a link to the recording file into the Notes section of the auto-log completed activity.

- **Attach to new 'Phone Call History'** – Creates a link to the recording file into the Notes section of the auto-log completed activity.

Custom Phone Fields

Contacts – By default, the CCS Desk CRM integration will only look in the standard contact fields for phone numbers. Custom fields in MSCRM that might contain phone numbers can be added here to be searched by CCS Desk. The name of the MSCRM field is required, not the label. Multiple fields can be added by using a comma sign between them.

Forms

There are 5 forms which are used in the MSCRM integration. The form name used to pop these can be edited if a custom form is required.

- **Contact**
- **Account**
- **Lead**
- **Phone Call Activity**
- **Lead Activity**

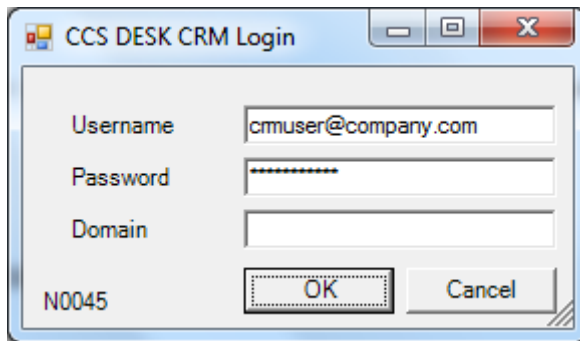
CCS IVR Integration

ID – The license number of CCS IVR used to ensure that the correct messages go to the correct CCS IVR server.

6.2.3.1 Additional Client Configuration

CCS Desk integrates with Microsoft Active Directory when logging in to MSCRM. A different username and password can be specified in the 'MSCRM Option' which will be activated in the Configure section of CCS Desk client, when this integration type is assigned in the agent profile. Please consult *CCS Desk Client – CCS Desk Options* section 1.14 for more information.

This setting is a requirement when MSCRM is deployed in a hosted environment.



Username – The name of a valid MSCRM account.

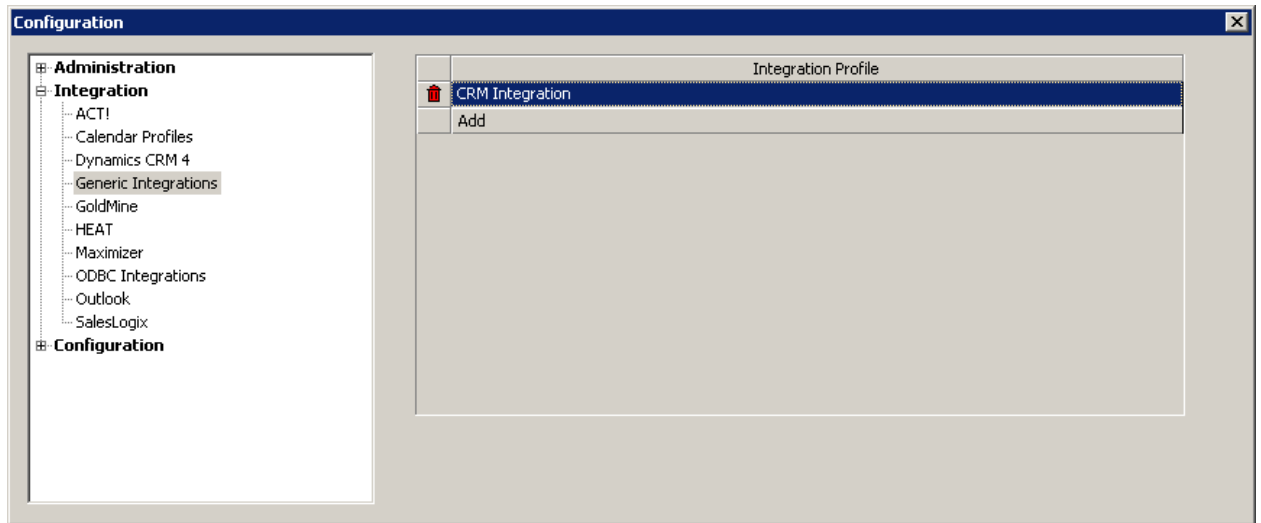
Password – the password to the MSCRM account.

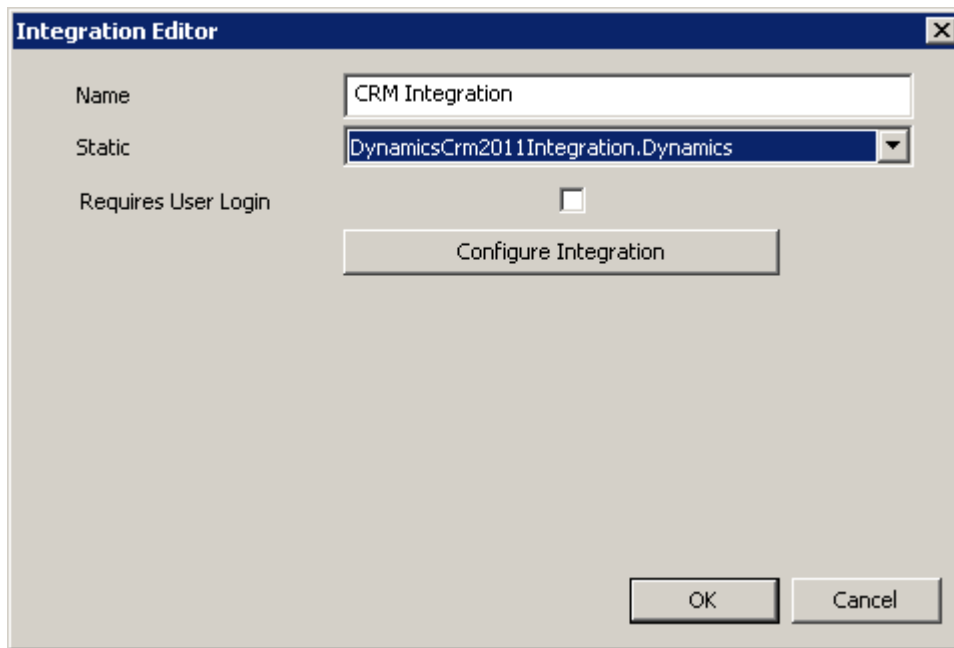
Domain – The domain name for the account, if applicable.

6.2.4 Generic Integrations

CCS Desk now has a Generic Integrations layer that simplifies the configuration and expected behaviour of the integration. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The Generic Integrations tab within CCS Desk Manager contains a list of the integration profiles to different applications. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Name – The name of the integration profile.

Static – The integrations already supported by this layer.

- **DynamicsCRM2011Integration.Dynamics** – Microsoft Dynamics CRM 2011 local / hosted / online.
- **DynamicsCRM4Integration.Dynamics** –Microsoft Dynamics CRM 4 local / hosted / online.
- **SimproIntegration.Simpro** – Workforce Management application called Simpro.
- **XplanIntegration.Xplan** – Investment Trends Planning application called Xplan.

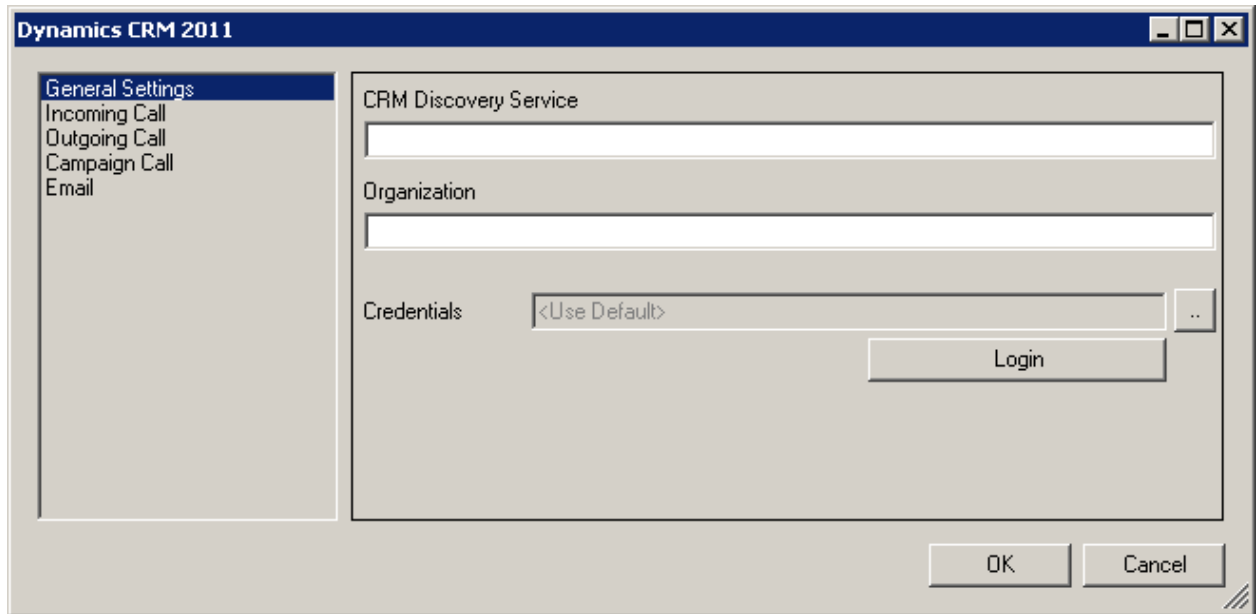
Requires User Login – Enable this checkbox if local authentication is required.

All current built-in integration such as MSCRM, Goldmine, SalesLogix, Maximizer, ACT! will be moved to this layer in future version.

The 'Configure Integration' button will open the next configuration screen.

6.2.4.1 Dynamics CRM 2011

General Settings



CRM Discovery Service – The address of the web service for authentication.

Organization – The name of the organization configured in Dynamics CRM 2011.

Credentials – This will be filled automatically according to the other settings below it.

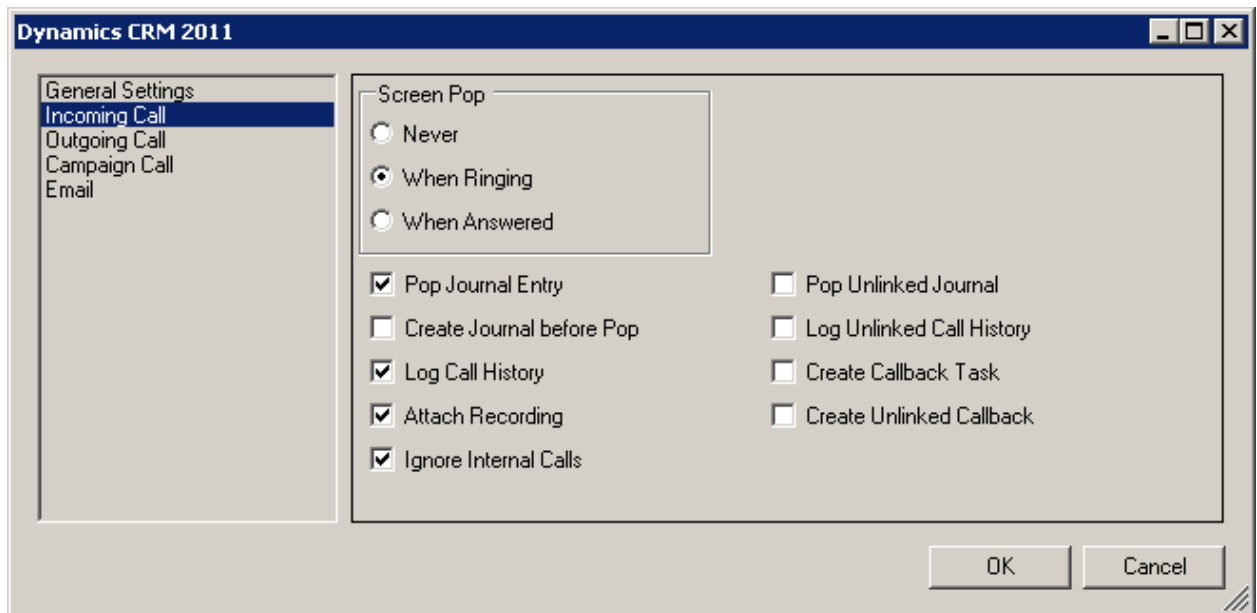
Username – The name of the Dynamics CRM 2011 account to use.

Domain – The domain name of the Dynamics CRM 2011 account, if applicable.

Password – The password to the Dynamics CRM 2011 account.

The 'Login' button will test the credentials and advise when successful.

Incoming Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Create Journal before Pop – Saves the Phone Call Activity before it is popped. This option is available only when 'Pop Journal Entry' is checked.

Log Call History – Creates an entry in History.

Attach Recording – Creates a link to the call recording file in History.

Ignore Internal Calls – Disables all integration features when the incoming call comes from an internal source.

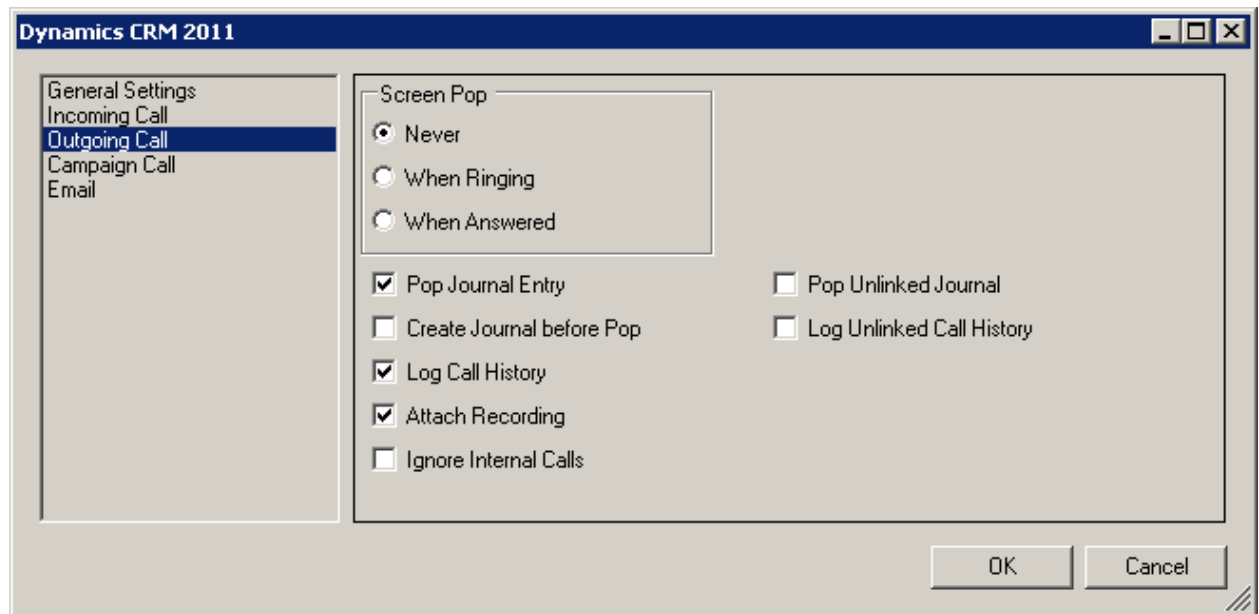
Pop Unlinked Journal – Displays new Phone Call Activity even when contact is not found in CRM.

Log Unlinked Call History – Creates an entry to History even when contact is not found in CRM.

Create Callback Task – Creates a Task to remind agent of the missed call.

Create Unlinked Callback – Creates a Task to remind agent of the missed call, even when contact is not found in CRM.

Outgoing Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – When the call is still ringing.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Create Journal before Pop – Saves the Phone Call Activity before it is popped. This option is available only when 'Pop Journal Entry' is checked.

Log Call History – Creates an entry in History.

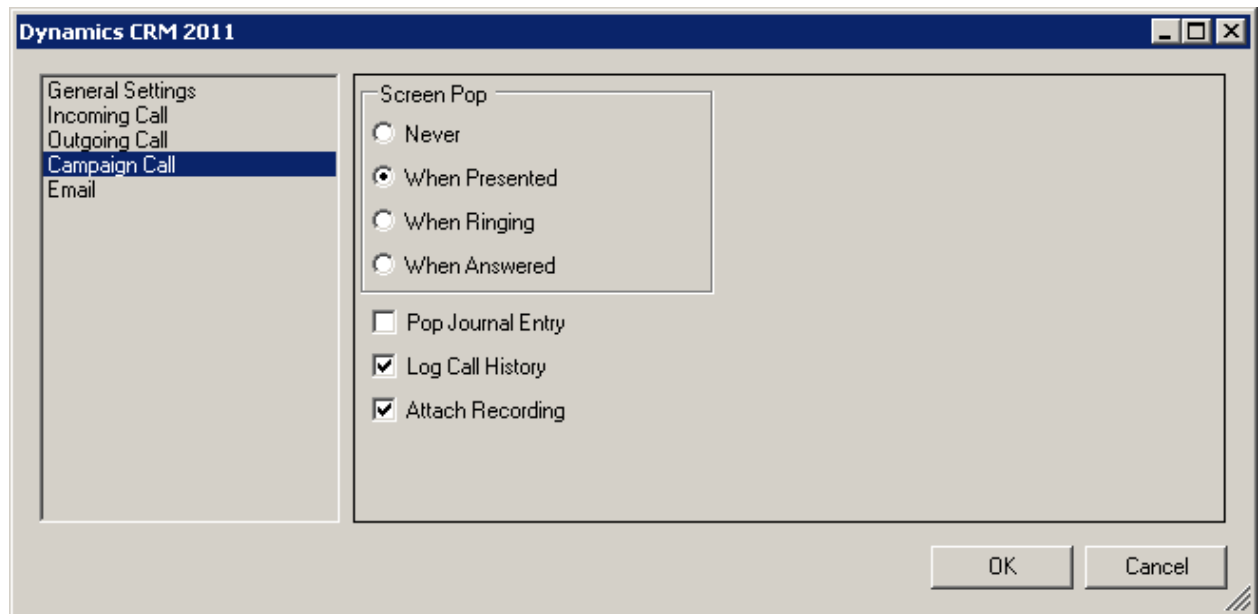
Attach Recording – Creates a link to the call recording file in History.

Ignore Internal Calls – Disables all integration features when calling an internal number.

Pop Unlinked Journal – Displays new Phone Call Activity even when contact is not found in CRM.

Log Unlinked Call History – Creates an entry to History even when contact is not found in CRM.

Campaign Call



Screen Pop – Displays the Contact screen when the caller is found.

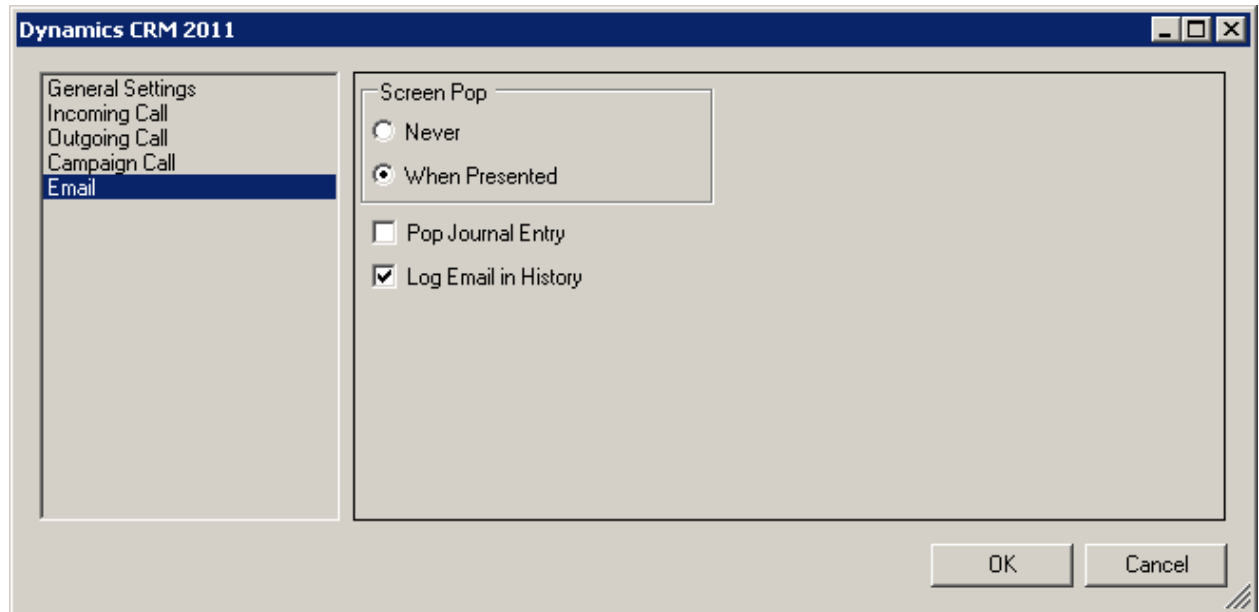
- **Never** – The feature is disabled.
- **When Presented** – When the next campaign call is assigned to agent.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Log Call History – Creates an entry in History.

Attach Recording – Creates a link to the call recording file in History.

Email



Screen Pop – Displays the Contact screen when the caller is found.

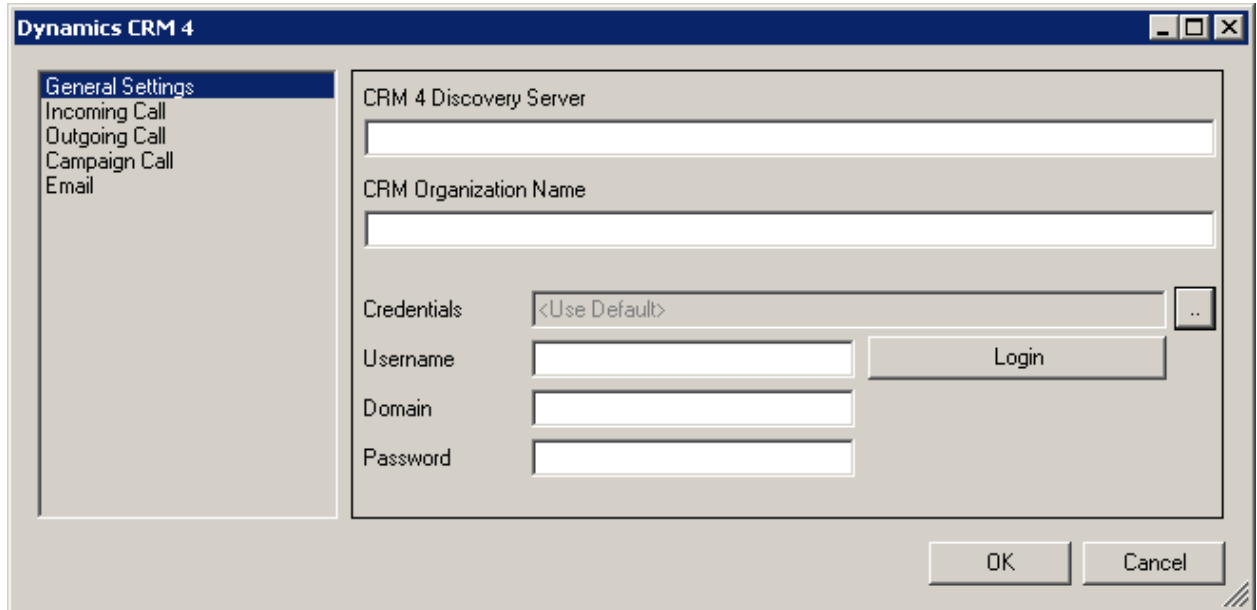
- **Never** – The feature is disabled.
- **When Presented** – When the email is assigned to agent.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Log Email in History – Creates a log of the email in History.

6.2.4.2 Dynamics CRM 4

General Settings



The screenshot shows a dialog box titled "Dynamics CRM 4". On the left is a tree view with "General Settings" selected, and other options like "Incoming Call", "Outgoing Call", "Campaign Call", and "Email". The main area contains several input fields: "CRM 4 Discovery Server" (a wide text box), "CRM Organization Name" (a wide text box), "Credentials" (a dropdown menu showing "<Use Default>" with a browse button "..."), "Username" (a text box), "Domain" (a text box), and "Password" (a text box). A "Login" button is positioned to the right of the Username field. At the bottom right are "OK" and "Cancel" buttons.

CRM 4 Discovery Server – The address of the web service for authentication.

Organization – The name of the organization configured in Dynamics CRM 4.

Credentials – This will be filled automatically according to the other settings below it.

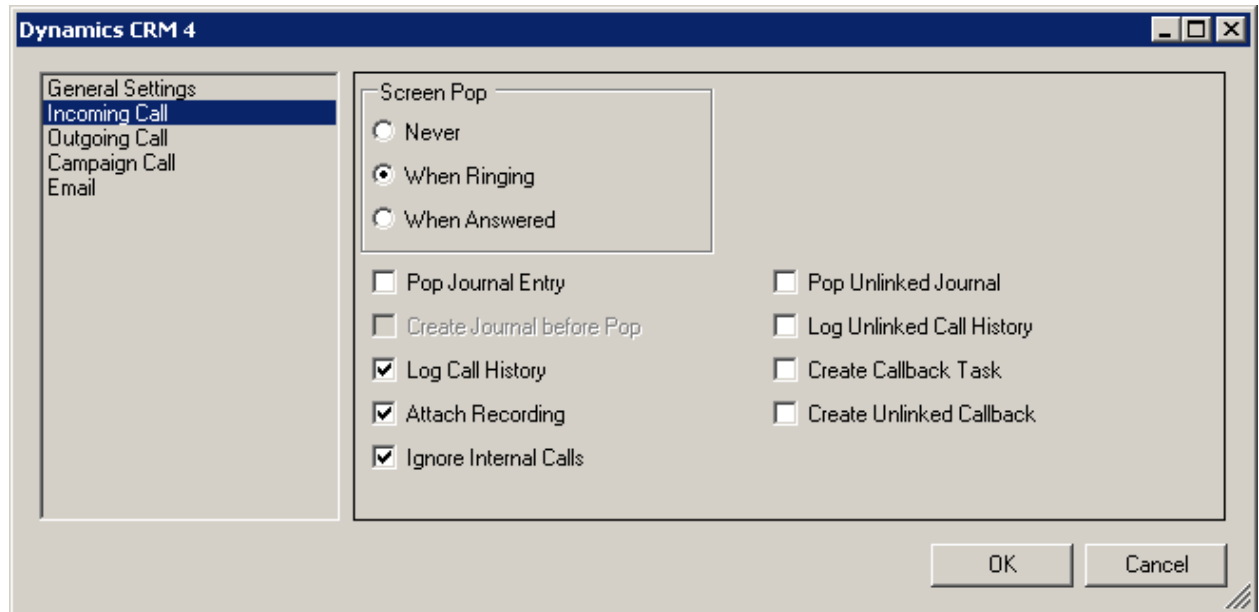
Username – The name of the Dynamics CRM 4 account to use.

Domain – The domain name of the Dynamics CRM 4 account, if applicable.

Password – The password to the Dynamics CRM 4 account.

The 'Login' button will test the credentials and advise when successful.

Incoming Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Create Journal before Pop – Saves the Phone Call Activity before it is popped. This option is available only when 'Pop Journal Entry' is checked.

Log Call History – Creates an entry in History.

Attach Recording – Creates a link to the call recording file in History.

Ignore Internal Calls – Disables all integration features when the incoming call comes from an internal source.

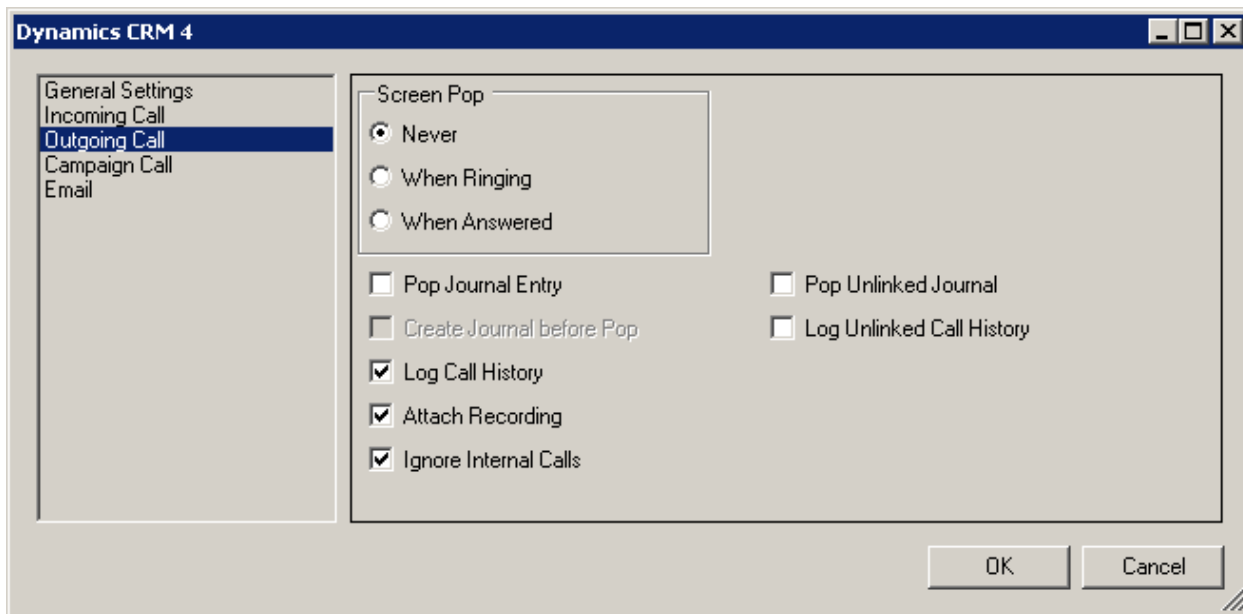
Pop Unlinked Journal – Displays new Phone Call Activity even when contact is not found in CRM.

Log Unlinked Call History – Creates an entry to History even when contact is not found in CRM.

Create Callback Task – Creates a Task to remind agent of the missed call.

Create Unlinked Callback – Creates a Task to remind agent of the missed call, even when contact is not found in CRM.

Outgoing Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – When the call is still ringing.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Create Journal before Pop – Saves the Phone Call Activity before it is popped. This option is available only when 'Pop Journal Entry' is checked.

Log Call History – Creates an entry in History.

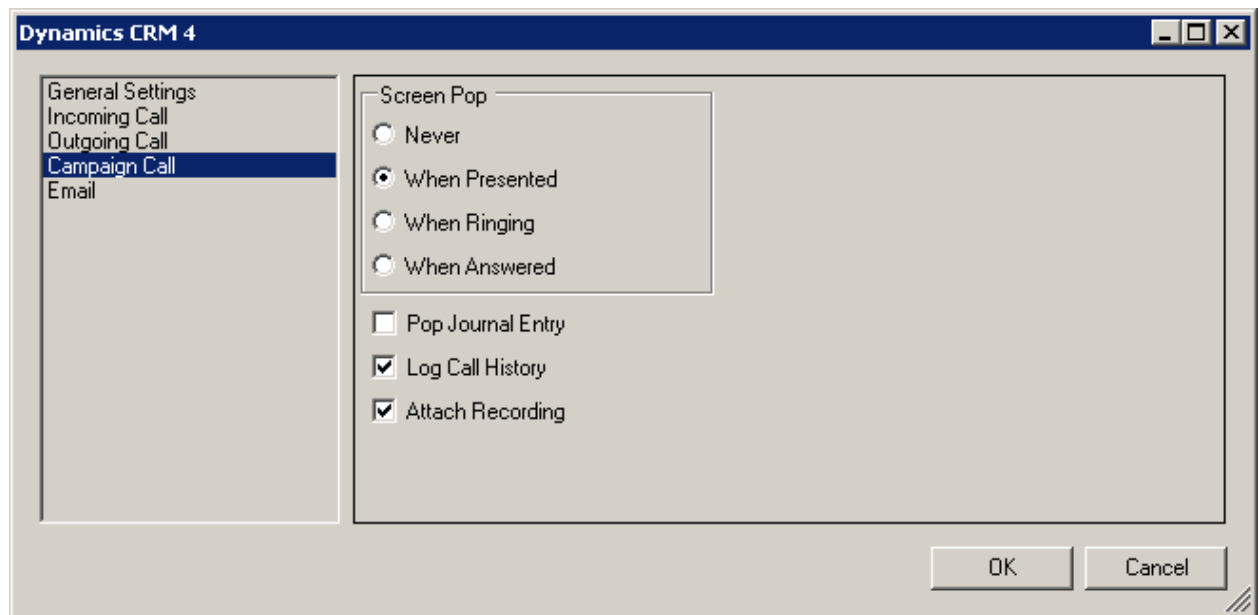
Attach Recording – Creates a link to the call recording file in History.

Ignore Internal Calls – Disables all integration features when calling an internal number.

Pop Unlinked Journal – Displays new Phone Call Activity even when contact is not found in CRM.

Log Unlinked Call History – Creates an entry to History even when contact is not found in CRM.

Campaign Call



Screen Pop – Displays the Contact screen when the caller is found.

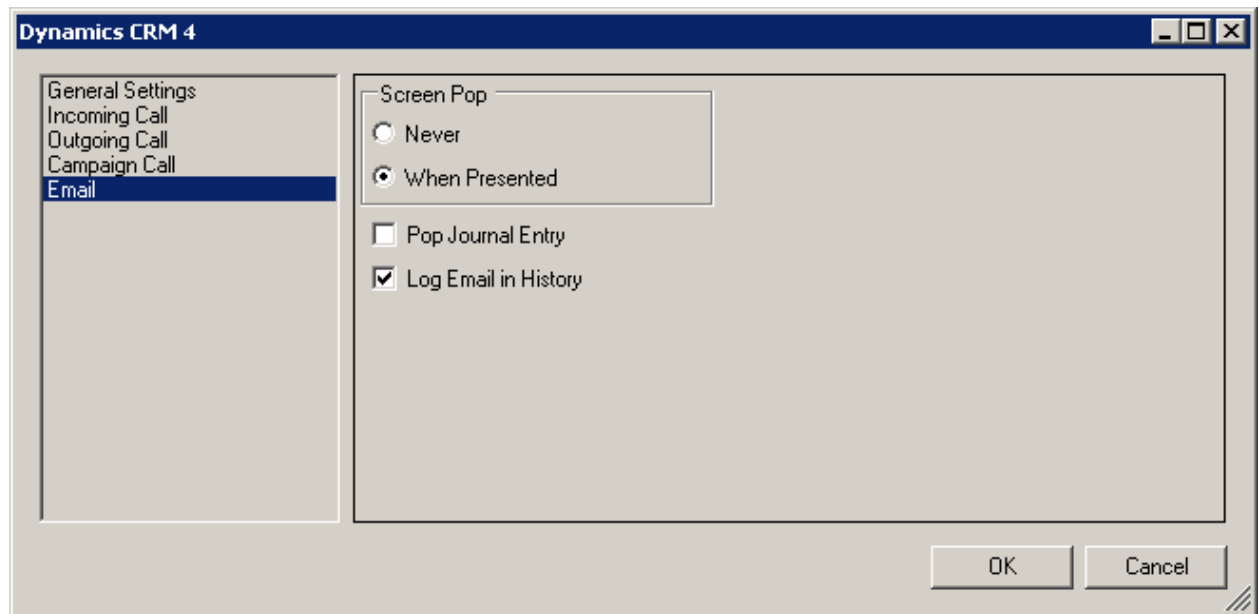
- **Never** – The feature is disabled.
- **When Presented** – When the next campaign call is assigned to agent.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Log Call History – Creates an entry in History.

Attach Recording – Creates a link to the call recording file in History.

Email



Screen Pop – Displays the Contact screen when the caller is found.

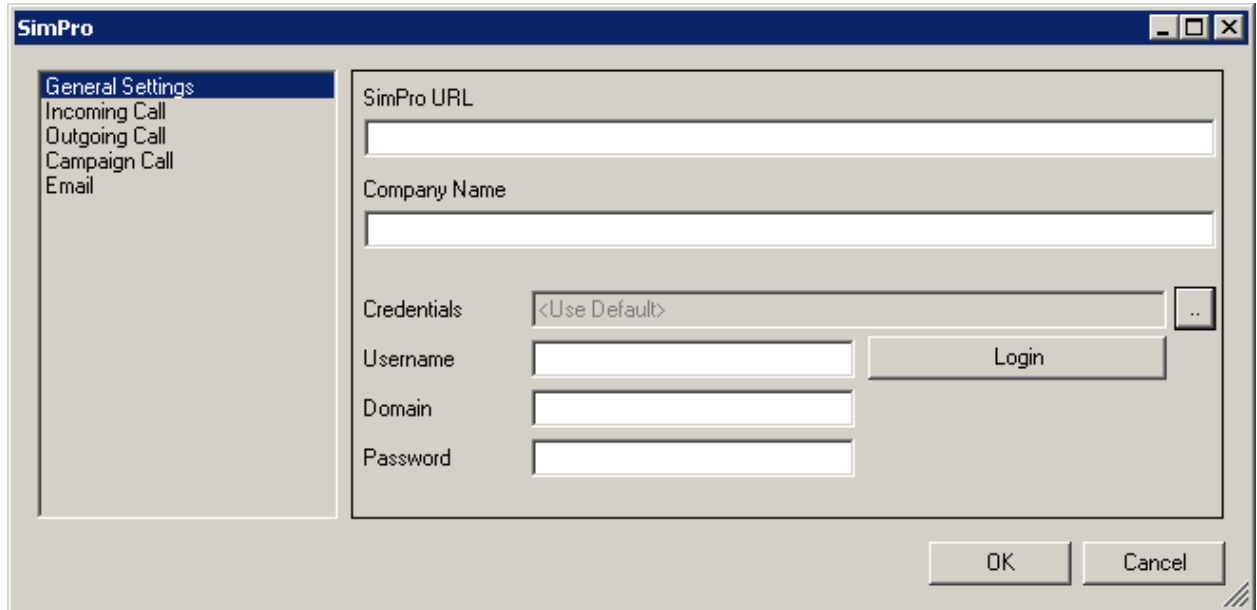
- **Never** – The feature is disabled.
- **When Presented** – When the email is assigned to agent.

Pop Journal Entry – Displays the new Phone Call Activity screen once the call is answered.

Log Email in History – Creates a log of the email in History.

6.2.4.3 Simpro

General Settings



The screenshot shows a Windows-style dialog box titled "SimPro". On the left is a tree view with "General Settings" selected, and other options like "Incoming Call", "Outgoing Call", "Campaign Call", and "Email". The main area contains several input fields: "SimPro URL" (empty), "Company Name" (empty), "Credentials" (set to "<Use Default>"), "Username" (empty), "Domain" (empty), and "Password" (empty). A "Login" button is positioned to the right of the Username field. At the bottom right are "OK" and "Cancel" buttons.

SimPro URL – The address of access SimPro.

Organization – The name of the organization configured in SimPro.

Credentials – This will be filled automatically according to the other settings below it.

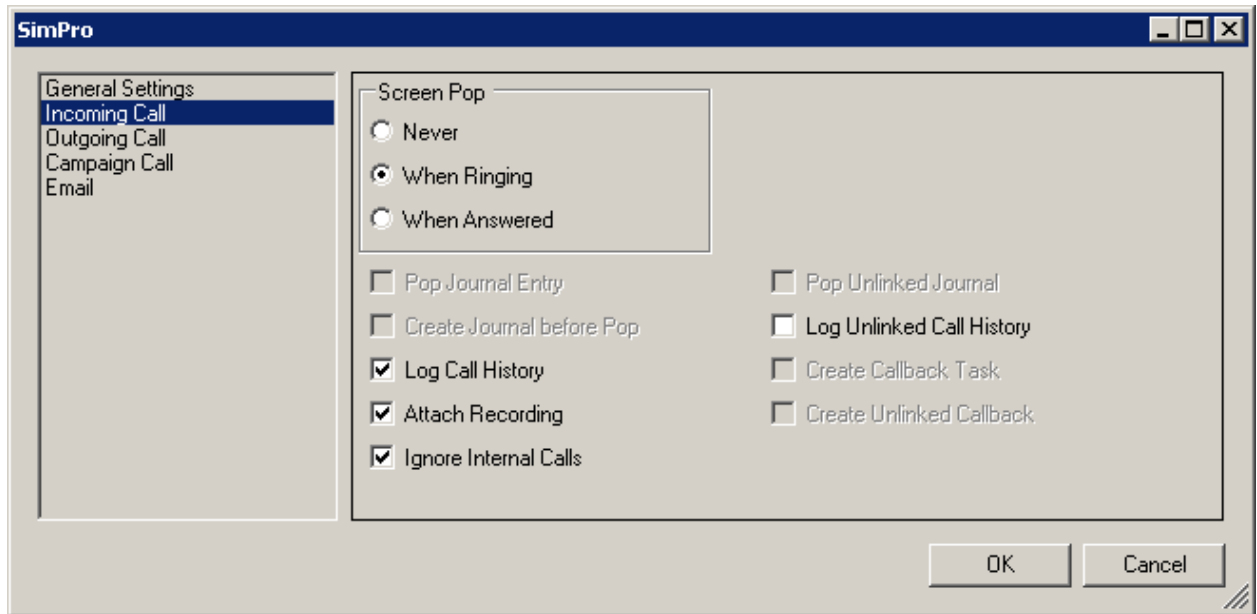
Username – The name of the SimPro account to use.

Domain – The domain name of the SimPro account, if applicable.

Password – The password to the SimPro account.

The 'Login' button will test the credentials and advise when successful.

Incoming Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

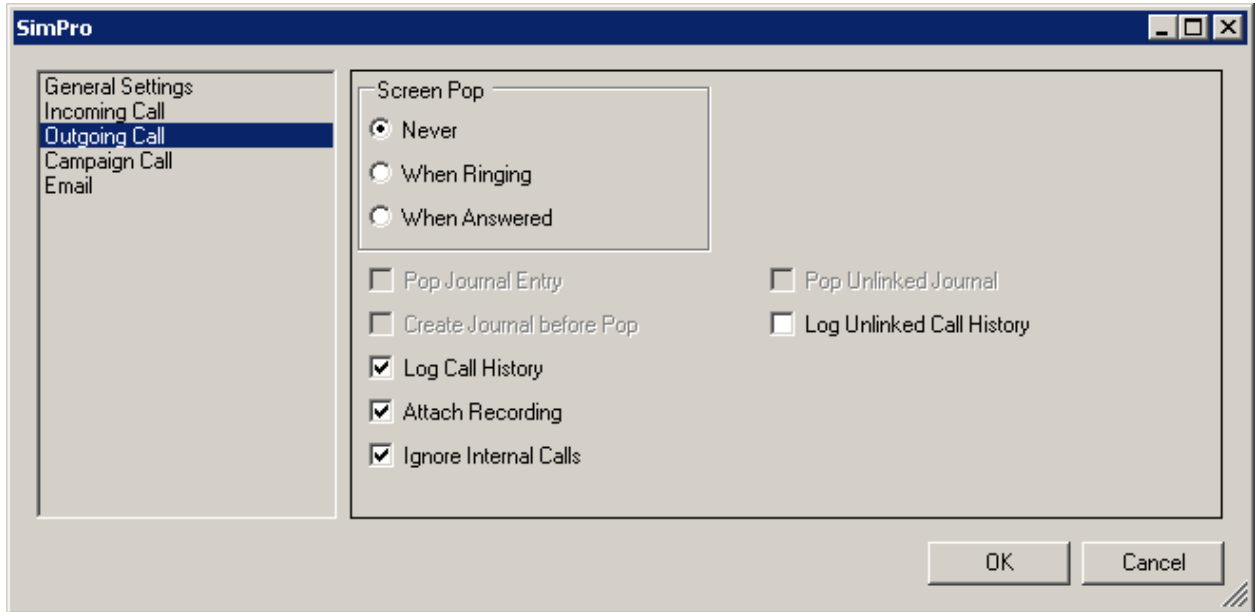
Log Call History – Creates a log of the call in the SimPro database.

Attach Recording – Creates a link to the call recording file in the SimPro database.

Ignore Internal Calls – Disables all integration features when the incoming call comes from an internal source.

Log Unlinked Call History – Creates a log of the call in SimPro, even when contact is not found.

Outgoing Call



Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – When the call is still ringing.
- **When Answered** – When the agent has answered the call.

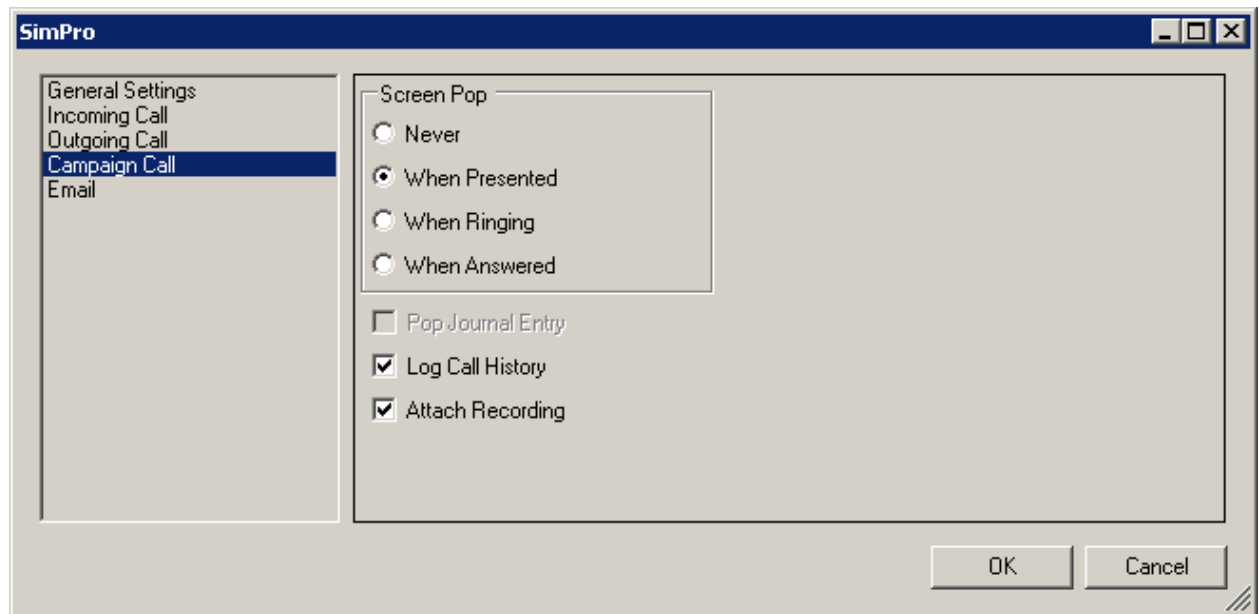
Log Call History – Creates a log of the call in the SimPro database.

Attach Recording – Creates a link to the call recording file in the SimPro database.

Ignore Internal Calls – Disables all integration features when calling an internal number.

Log Unlinked Call History – Creates a log of the call in SimPro, even when contact is not found.

Campaign Call



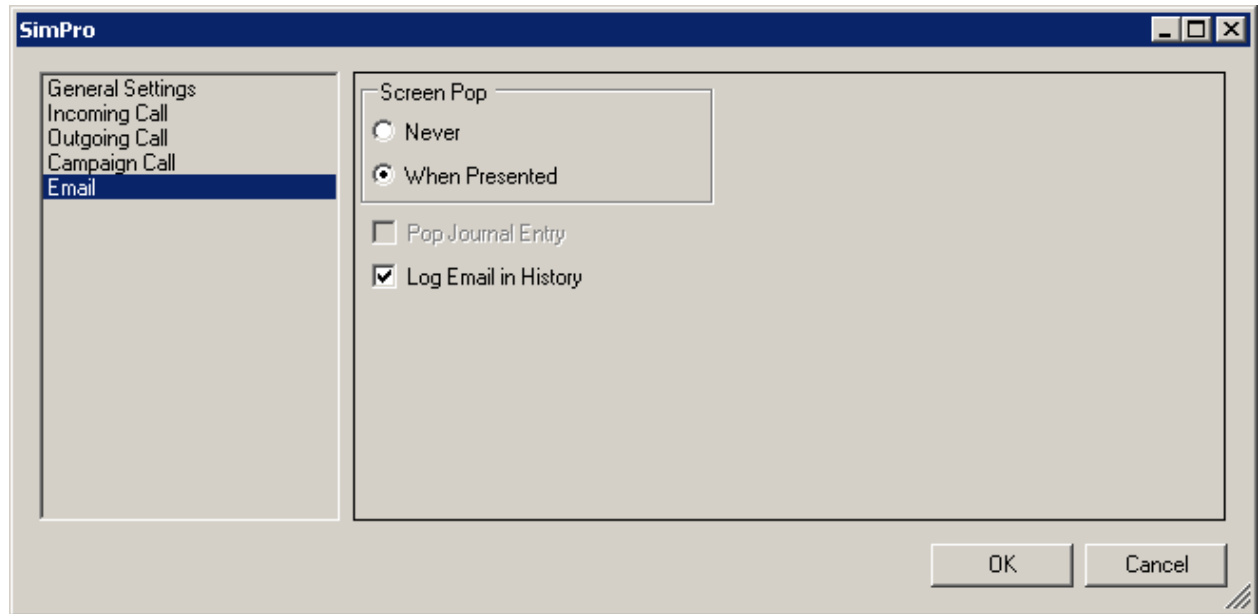
Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Presented** – When the next campaign call is assigned to agent.
- **When Ringing** – When the call is still ringing.
- **When Answered** – When the agent has answered the call.

Log Call History – Creates a log of the call in the SimPro database.

Attach Recording – Creates a link to the call recording file in the SimPro database.

Email



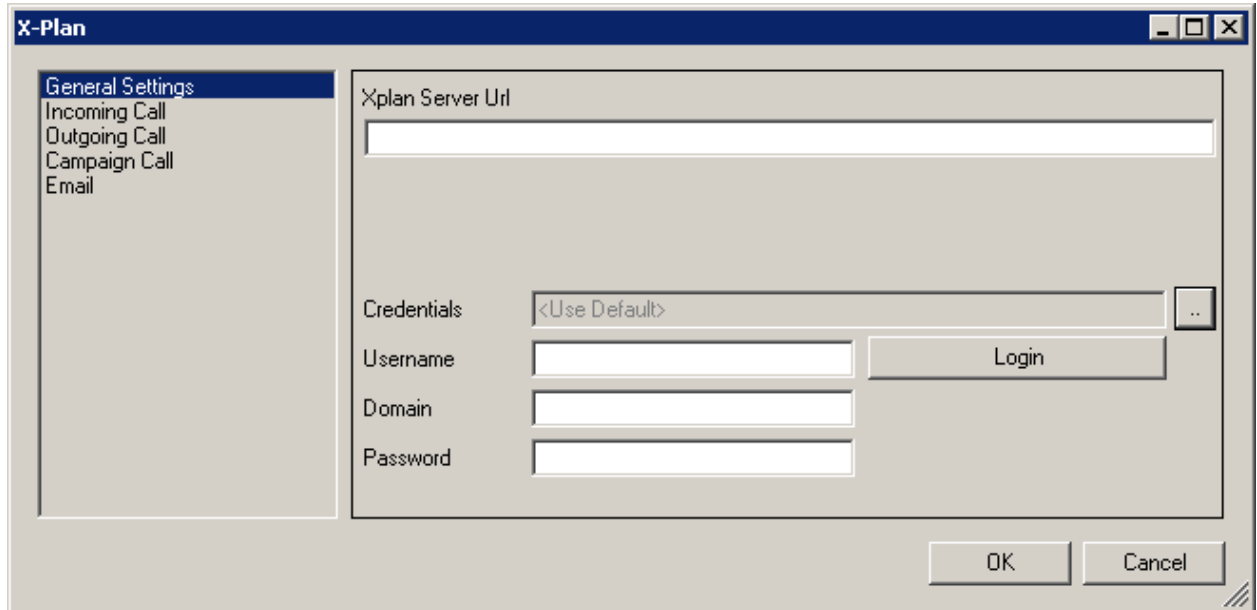
Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Presented** – When the email is assigned to agent.

Log Email in History – Creates a log of the email in SimPro database.

6.2.4.4 Xplan

General Settings



Xplan Server URL – The address of access Xplan.

Credentials – This will be filled automatically according to the other settings below it.

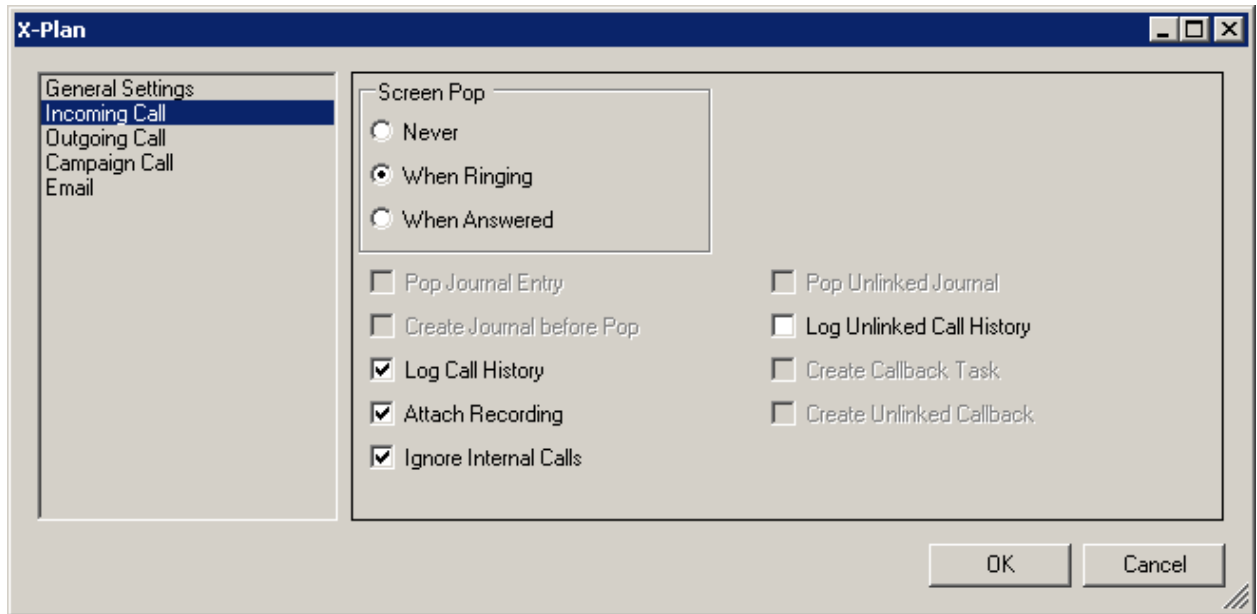
Username – The name of the SimPro account to use.

Domain – The domain name of the SimPro account, if applicable.

Password – The password to the SimPro account.

The 'Login' button will test the credentials and advise when successful.

Incoming Call



Screen Pop – Displays the contact information when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

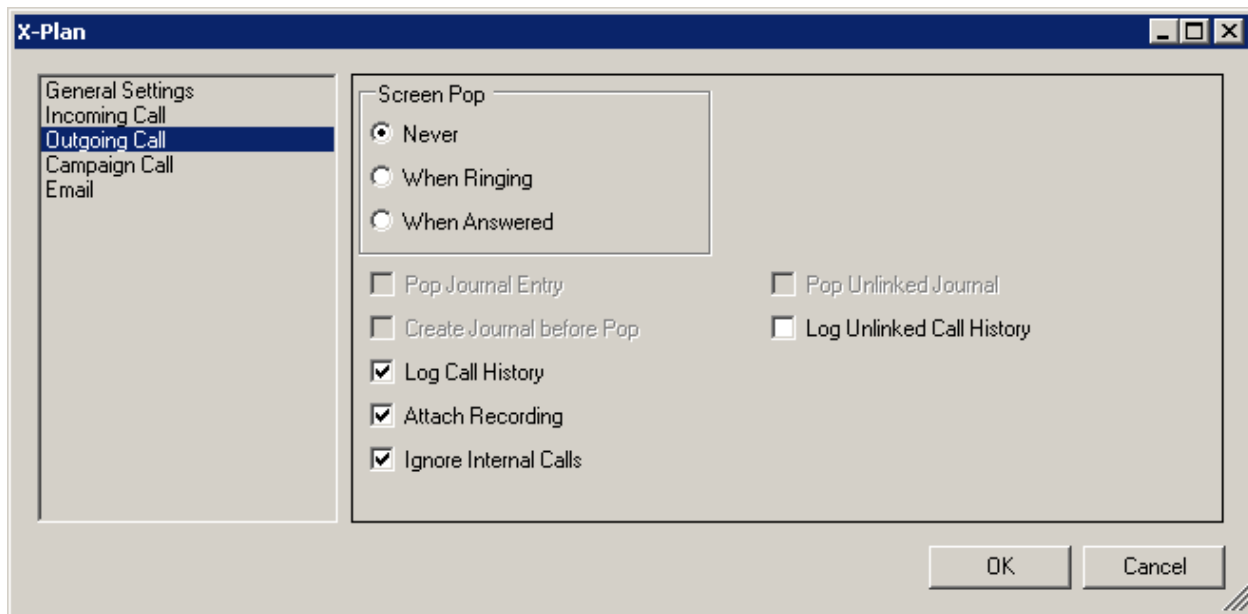
Log Call History – Creates a log of the call in the Xplan database.

Attach Recording – Creates a link to the call recording file in the Xplan database.

Ignore Internal Calls – Disables all integration features when the incoming call comes from an internal source.

Log Unlinked Call History – Creates a log of the call in Xplan, even when contact is not found.

Outgoing Call



Screen Pop – Displays the contact information when the caller is found.

- **Never** – The feature is disabled.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

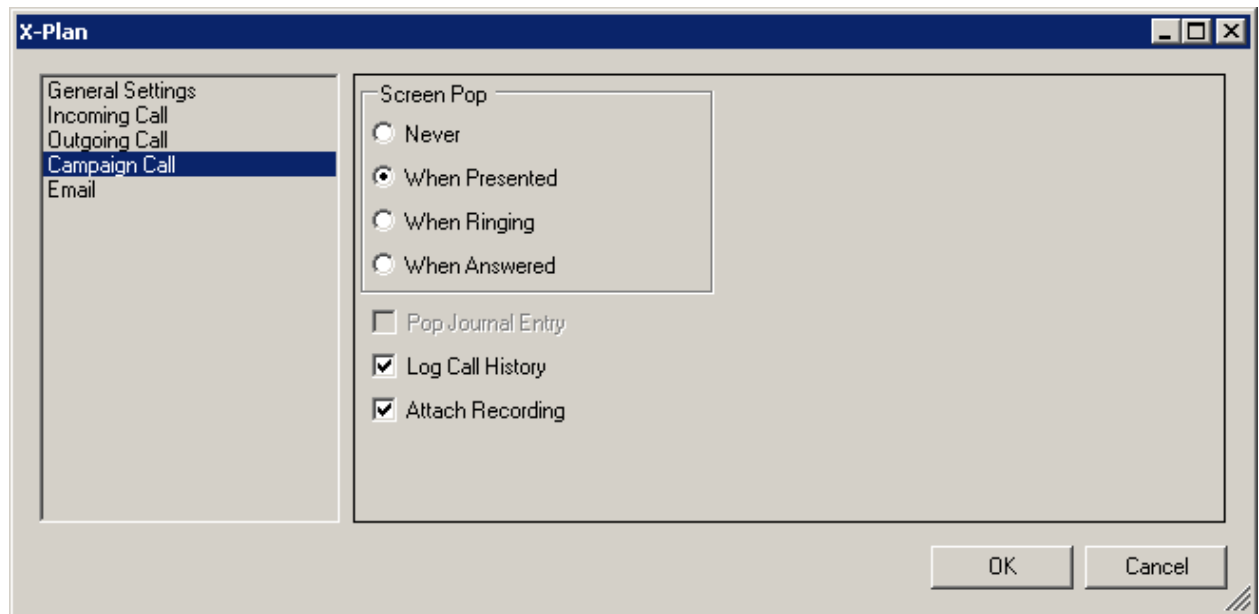
Log Call History – Creates a log of the call in the Xplan database.

Attach Recording – Creates a link to the call recording file in the Xplan database.

Ignore Internal Calls – Disables all integration features when dialing an internal destination.

Log Unlinked Call History – Creates a log of the call in Xplan, even when contact is not found.

Campaign Call



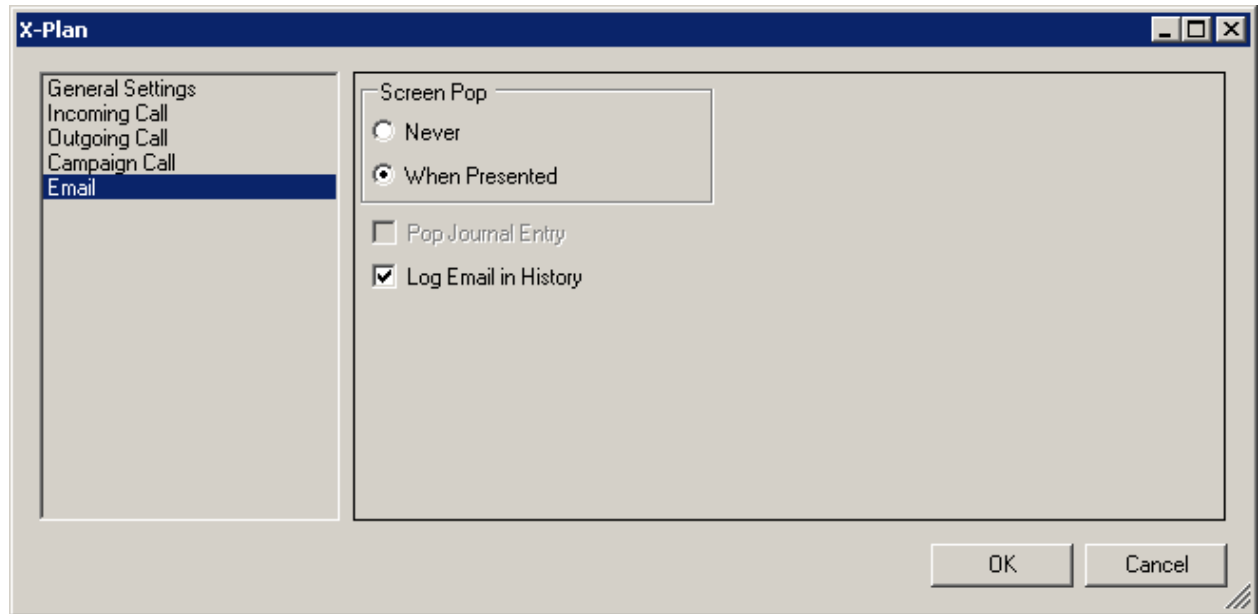
Screen Pop – Displays the contact information when the caller is found.

- **Never** – The feature is disabled.
- **When Presented** – When the next campaign call is assigned to agent.
- **When Ringing** – As soon as the call rings.
- **When Answered** – When the agent has answered the call.

Log Call History – Creates a log of the call in the Xplan database.

Attach Recording – Creates a link to the call recording file in the Xplan database.

Email



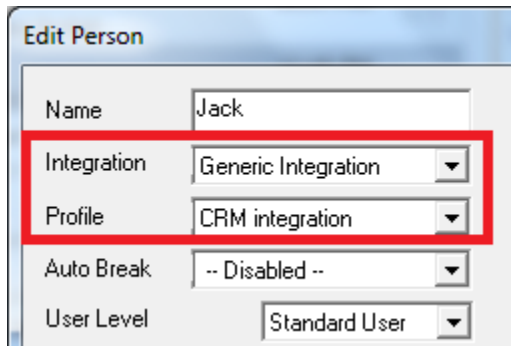
Screen Pop – Displays the Contact screen when the caller is found.

- **Never** – The feature is disabled.
- **When Presented** – When the email is assigned to agent.

Log Email in History – Creates a log of the email in the Xplan database.

6.2.4.5 Additional Client Configuration

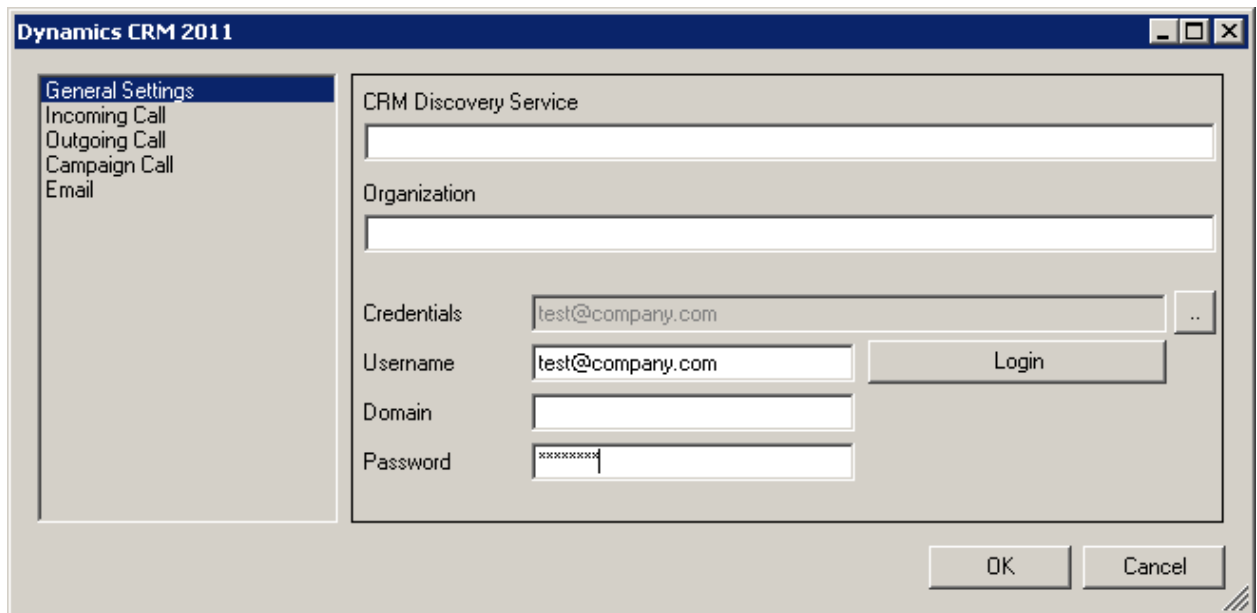
The 'Integration' setting must be changed to *Generic Integration* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a dialog box titled "Edit Person" with the following fields:

- Name: Jack
- Integration: Generic Integration (highlighted with a red box)
- Profile: CRM integration (highlighted with a red box)
- Auto Break: -- Disabled --
- User Level: Standard User

If 'Requires User Login' is ticked, the Generic CRM integration window will be displayed when CCS Desk client is launched. Use the credentials section to configure the correct username, password and domain. None of the other the settings are configurable from this screen.



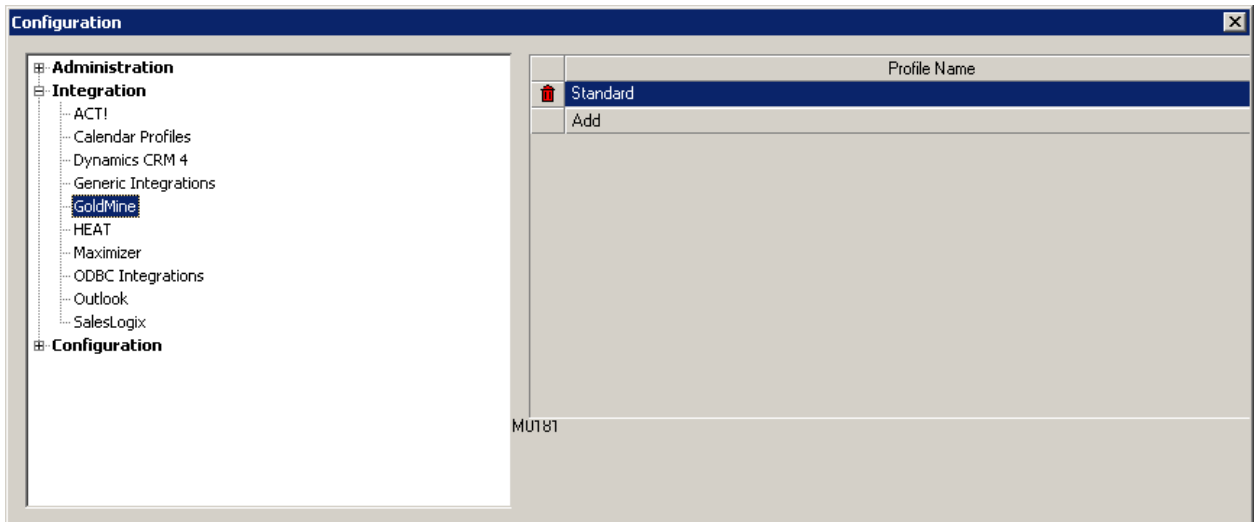
The screenshot shows the "Dynamics CRM 2011" configuration window with the following fields and values:

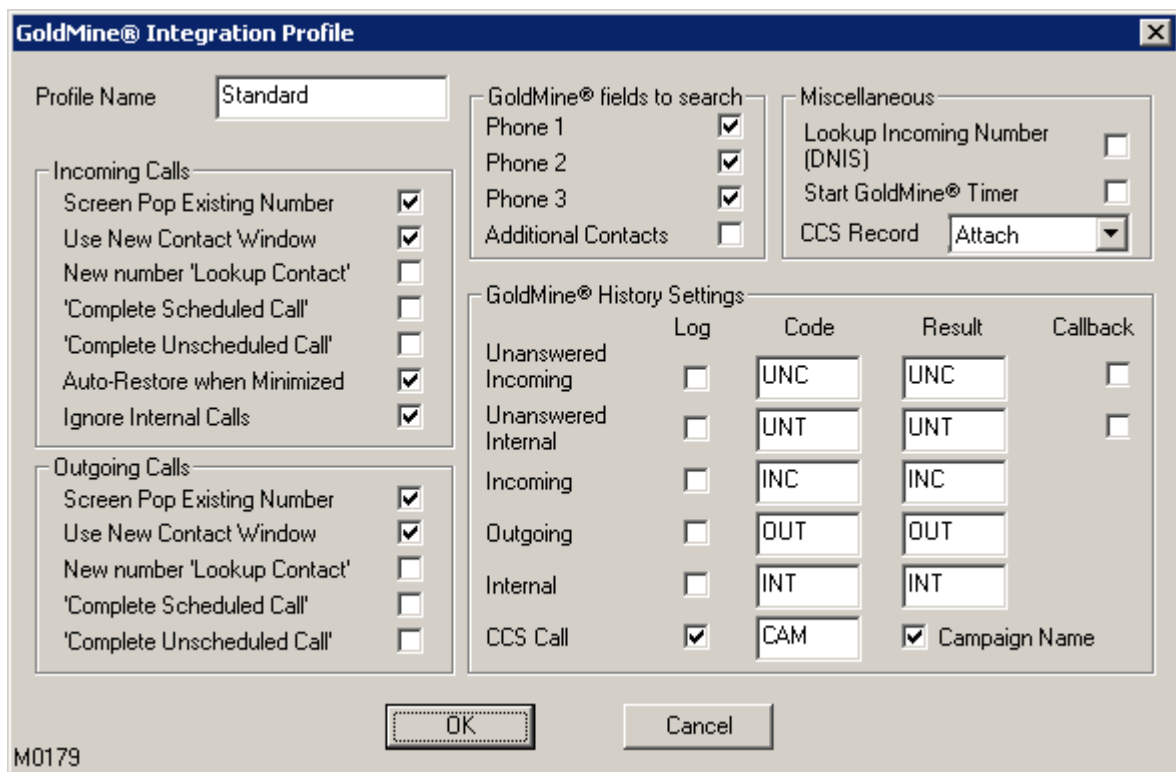
- CRM Discovery Service: [Empty]
- Organization: [Empty]
- Credentials: test@company.com
- Username: test@company.com
- Domain: [Empty]
- Password: XXXXXXXXXXXX
- Login button: [Visible]

6.2.5 Goldmine®

When CCS Desk is integrated with GoldMine, it provides services such as popping a contact record on an incoming call, allowing dialling of contact numbers within GoldMine etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The Goldmine tab within CCS Desk Manager contains a list of the Goldmine integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Incoming Calls

Screen Pop Existing Number – Display their Goldmine contact record if the number of the caller is known.

Use New Contact Window – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed

New Number Lookup Contact - In the case that the number of an incoming call is not found in the contact database, a Lookup Contact window to be displayed.

Complete Scheduled Call – When an incoming call results in an identified contact, a complete schedule call item is opened, linked to the contact.

Complete Unscheduled Call – When an incoming call results in an identified contact, a completed unscheduled call item is created, linked to the contact.

Auto-Restore When Minimised – This option will restore the CCS Desk client when an incoming call is received and minimised when the call ends.

Ignore Internal Calls – GoldMine will not pop the contact of a call that is on an internal extension.

Outgoing Calls

Screen Pop Existing Number – Display their Goldmine contact record if the number of the caller is known.

Use New Contact Window – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed.

New Number Lookup Contact - In the case that the number of an outgoing call is not found in the contact database, a Lookup Contact window to be displayed.

Completed Scheduled Call – Completes a pending action for the contact.

Complete Unscheduled Call – Creates a new unscheduled call action for the contact.

Goldmine Fields to Search

This specifies the phone number fields in GoldMine that CCS Desk will search for a contacts number. Additional contacts can only be searched if the SQL version of GoldMine is installed.

Goldmine History Settings

The GoldMine History Settings group together options describing what information on call history should be automatically logged into GoldMine.

For each row the '**Log**' checkbox determines if calls of that type should be logged. The '**Code**' box determines which history code that the event is given, and the '**Result**' box describes the result that the history item is given.

If the '**Callback**' check box is checked, a pending call action is automatically created. This feature should only be selected if an incoming call rings on one CCS Desk agent only. Otherwise all the agents who did not answer the call will receive a missed call record and a call back scheduled.

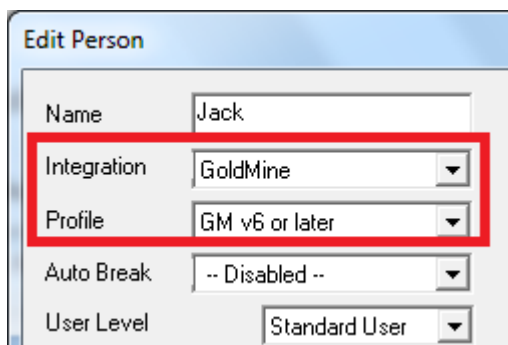
If the '**Campaign Name**' option is enabled for the CCS Call row, when a CCS Call Campaign Call is logged in the History of GoldMine, the name of the Campaign will be inserted at the start of the Reference text.

Miscellaneous

Lookup Incoming Number (DNIS) – This option tells CCS Desk to use the number the caller dialled rather than the callers own number, for the GoldMine searches on incoming calls.

Start GoldMine Timer – CCS Desk will start the Goldmine timer when a call begins.

The 'Integration' setting must be changed to *Goldmine* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a window titled "Edit Person" with the following fields:

Name	Jack
Integration	GoldMine
Profile	GM v6 or later
Auto Break	-- Disabled --
User Level	Standard User

Both CCS Desk and Goldmine must be running for this integration to work.

6.2.5.1 Additional Client Configuration

The following DLL files must be copied from the Goldmine program files folder to the Windows System folder i.e. *C:\Windows\System32*. The name of the files may differ slightly depending upon the version of Goldmine.

GM7S32.DLL

GM7TP32.DLL

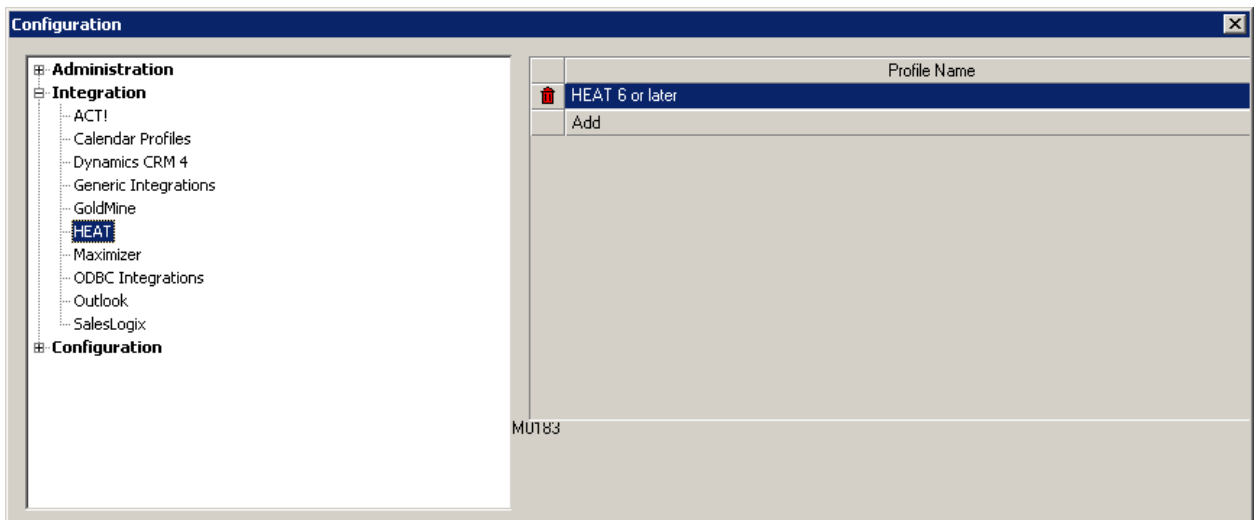
GMSSL32.DLL

GMXML.DLL

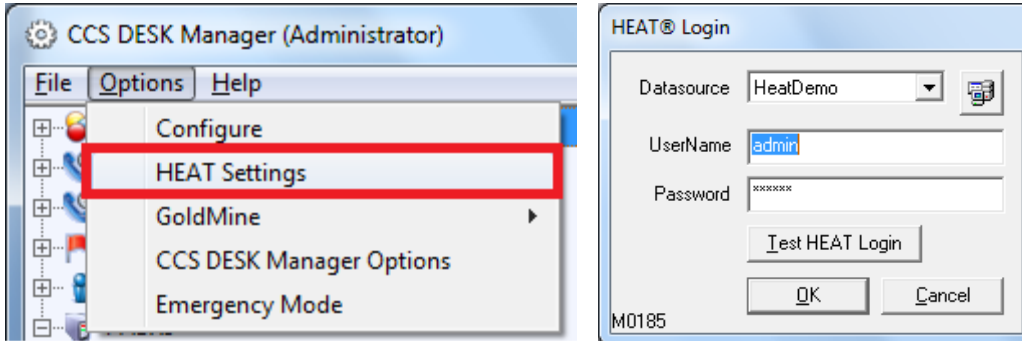
6.2.6 HEAT®

When CCS Desk is integrated with HEAT, it provides services such as popping a contact record on an incoming call, allowing dialling of contact numbers within HEAT etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The HEAT tab within CCS Desk Manager contains a list of the HEAT integration profiles. A new integration profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Before you can enter the configuration, you will need to configure the HEAT Settings in the main screen of CCS Desk Manager.

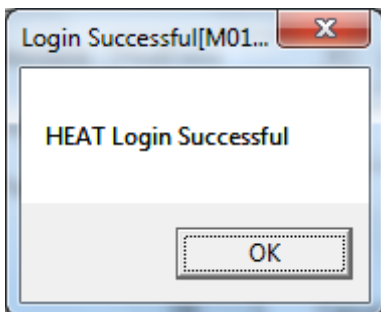


Datasource – The ODBC data source to the HEAT database. The button next to this is a shortcut to the Windows ODBC administration tool.

UserName – The account used to access the HEAT data source.

Password – The password to the account.

The 'Test HEAT Login' will confirm whether the credentials are sufficient for CCS Desk Manager to login to HEAT.



HEAT® Profile Configuration

Profile Name: HEAT 6 or later

Customer Type: Employee

ID Field: CustID

Name Field: FirstName

Company Field: CustType

Screen Pop

Form to Pop: Call History

Fields to Match (Dialable Fields): RecvdDate, RecvdTime, Phone1, PhoneExt1

Data to Match: CLI

Data to Match: Trunk

Data Source: [icon]

Table: [dropdown]

Field to Match: [dropdown]

Return Value: [dropdown]

OK Cancel

M0182

Profile Name – The name of the HEAT integration profile.

Customer Type – Select the type of contacts to integrate with.

ID Field – The HEAT field that will be used as the contact ID.

Name Field – The HEAT field that will be used as the name of the contact.

Company Field – The HEAT field that will be used as the company name of the contact.

Form to Pop – the different screens in HEAT that can be opened when there is an active call.

- **Profile** – The main contact screen
- **Contacts** – The list of additional contacts linked to this contact
- **Configuration** – The detailed information for the contact.
- **History** – The list of open and closed tickets assigned to this contact.
- **New Call Record** – Creates a new ticket.

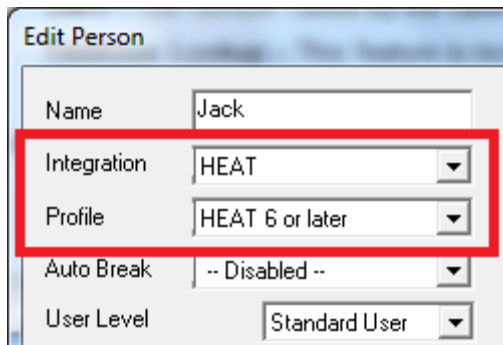
Fields to Match – The HEAT fields that will be searched against the source information. Multiple fields in the list can be selected

Data to Match – The input source to find a matching contact.

- **CLI** – The caller number.
- **DNIS** – The number called by the caller.
- **Database Lookup** – This feature is no longer supported.

Additional settings are part of the 'Database Lookup' mode that is no longer supported.

The 'Integration' setting must be changed to *HEAT* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



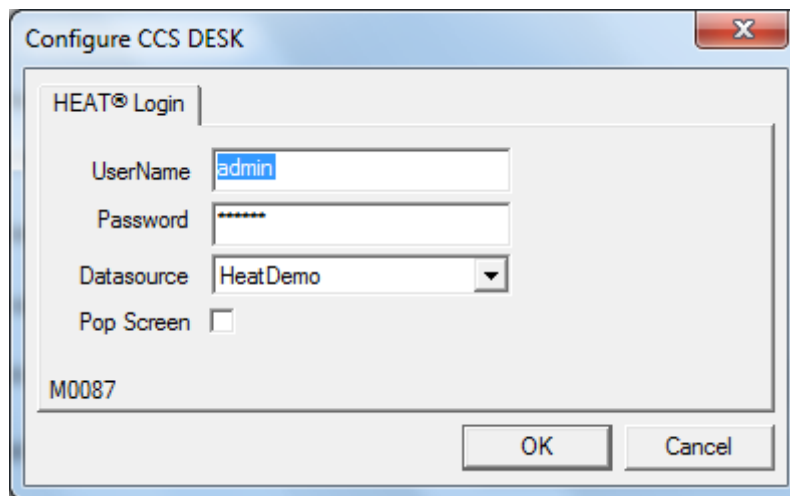
The screenshot shows a window titled "Edit Person" with several configuration fields. The "Integration" field is set to "HEAT" and the "Profile" field is set to "HEAT 6 or later". These two fields are highlighted with a red rectangular box. Other fields include "Name" (Jack), "Auto Break" (-- Disabled --), and "User Level" (Standard User).

Both CCS Desk and HEAT must be running for this integration to work.

6.2.6.1 Additional Client Configuration

Each CCS Desk client must be configured with the HEAT ODBC data source name, username and password. The 'Maximizer Option' button will be activated in the Configure section of CCS Desk client, when this integration type is assigned in the agent

profile. Please consult *CCS Desk Client – CCS Desk Options* section 1.14 for more information.



UserName – The name of a valid HEAT account.

Password – The password to the HEAT account.

Datasource – The ODBC data source name to the HEAT database.

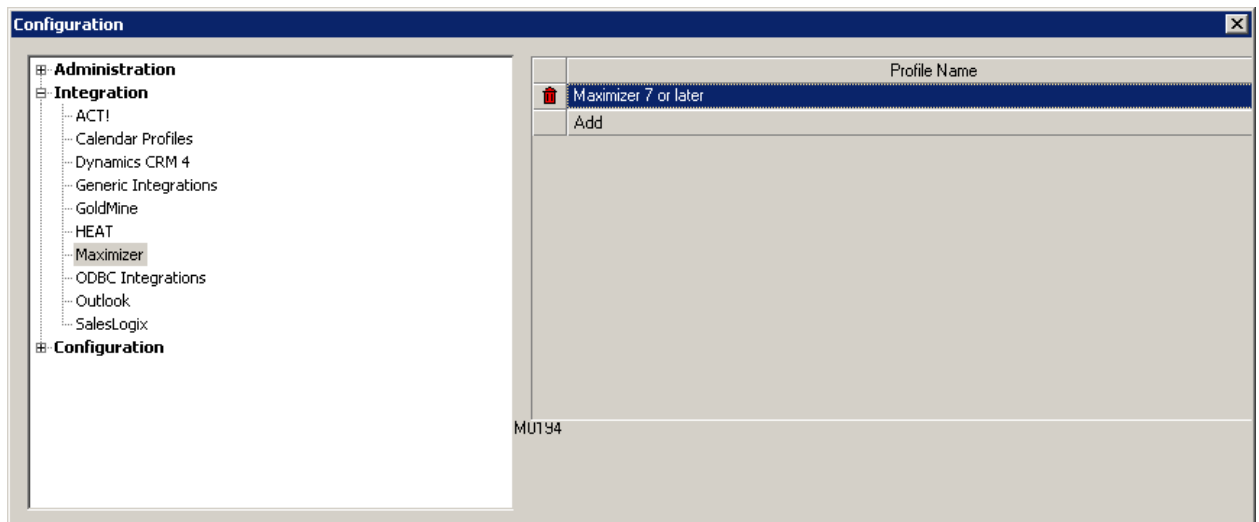
Pop Screen – Enables this check box to pop the HEAT screen when there is a new active call.

6.2.7 Maximizer

When CCS Desk is integrated with Maximizer, it provides services such as popping a contact record on an incoming call, dialing contact numbers from within Maximizer etc. Sets of configuration

options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The Maximizer tab within CCS Desk Manager contains a list of the Maximizer integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Maximizer Integration Profile

Name:

Incoming Calls

- Screen Pop Known Numbers
- 'Write a Note' when answered
- New Number 'Search Company'
- Log Answered Calls (Result Code)
- Log Unanswered Calls (Result Code)
- Schedule Call Back (Result Code)
- Link CCS Record Files in 'Documents'

Outgoing Calls

- Screen Pop Known Numbers
- 'Write a Note'
- New Number 'Search Company'
- Log Outgoing Calls (Result Code)
- Link CCS Record Files in 'Documents'

OK Cancel

M0193

Incoming Calls

Screen Pop Known Numbers – If the contact's number is found in the Maximizer address book, the contact record will be opened in Maximizer.

'Write a Note' when answered – When an incoming call is answered, the 'Write a Note' window will be opened to allow agent to enter details of the call they are receiving, to be stored in the Notes section for that contact.

New Number 'Search Company' – If the caller cannot be identified, this option will enable Maximizer to display the 'Search by Company' screen.

Log Answered Calls – Generate automatic entries into the Maximizer Notes for incoming calls that are answered. These notes are formatted to appear in the Phone Log report within Maximizer. One

of the fields in this report is Result. You can enter the appropriate Result Code for each of the different call types so they can be identified in the Phone Log report.

Log Unanswered Calls – Generate automatic entries into the Maximizer Notes for incoming calls that are missed. These notes are formatted to appear in the Phone Log report within Maximizer. One of the fields in this report is Result. You can enter the appropriate Result Code for each of the different call types so they can be identified in the Phone Log report.

Schedule Call Back – When enabled, a telephone call task will be scheduled to return the missed call.

Link CCS Record Files in History - When enabled, a link to the call recording file will be added to the Documents tab to allow subsequent playback of the recording.

Outgoing Calls

Screen Pop Known Numbers – If the contact's number is found in the Maximizer address book, the contact record will be opened in Maximizer.

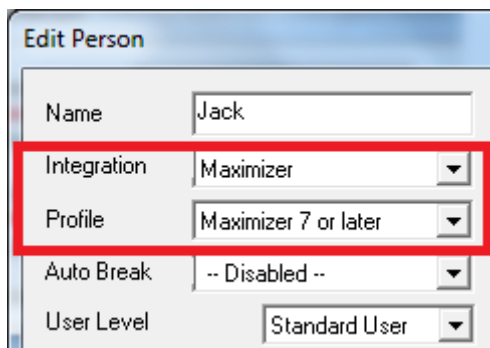
'Write a Note' when answered – When the outgoing call is answered, the 'Write a Note' window will be opened to allow agent to enter details of the call they are making, to be stored in the History for that contact.

New Number 'Search Contact' – If the caller cannot be identified, this option will enable Maximizer to display the 'Search by Contact' screen.

Log Outgoing Calls – Generate automatic entries into the Maximizer Notes History for all outgoing calls. These notes are formatted to appear in the Phone Log report within Maximizer. One of the fields in this report is Result. You can enter the appropriate Result Code for each of the different call types so they can be identified in the Phone Log report.

Link CCS Record Files in History - When enabled, a link to the call recording file will be added to the Documents tab to allow subsequent playback of the recording.

The 'Integration' setting must be changed to *Maximizer* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a dialog box titled "Edit Person" with the following fields:

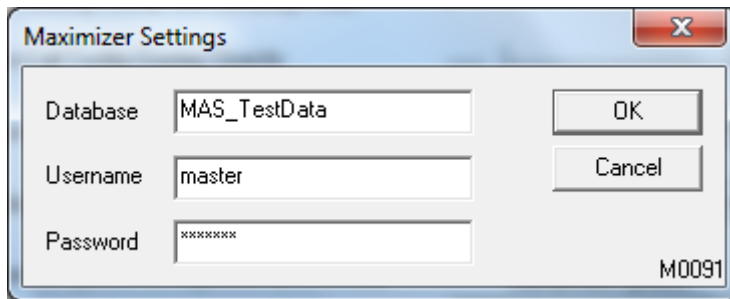
Name	Jack
Integration	Maximizer
Profile	Maximizer 7 or later
Auto Break	-- Disabled --
User Level	Standard User

The "Integration" and "Profile" rows are highlighted with a red rectangular box.

Both CCS Desk and Maximizer must be running for this integration to work.

6.2.7.1 Additional Client Configuration

Each CCS Desk client must be configured with the Maximizer ODBC data source name, username and password. The 'Maximizer Option' button will be activated in the Configure section of CCS Desk client, when this integration type is assigned in the agent profile. Please consult *CCS Desk Client – CCS Desk Options* section 1.14 for more information.



Database – The ODBC data source name to the Maximizer database.

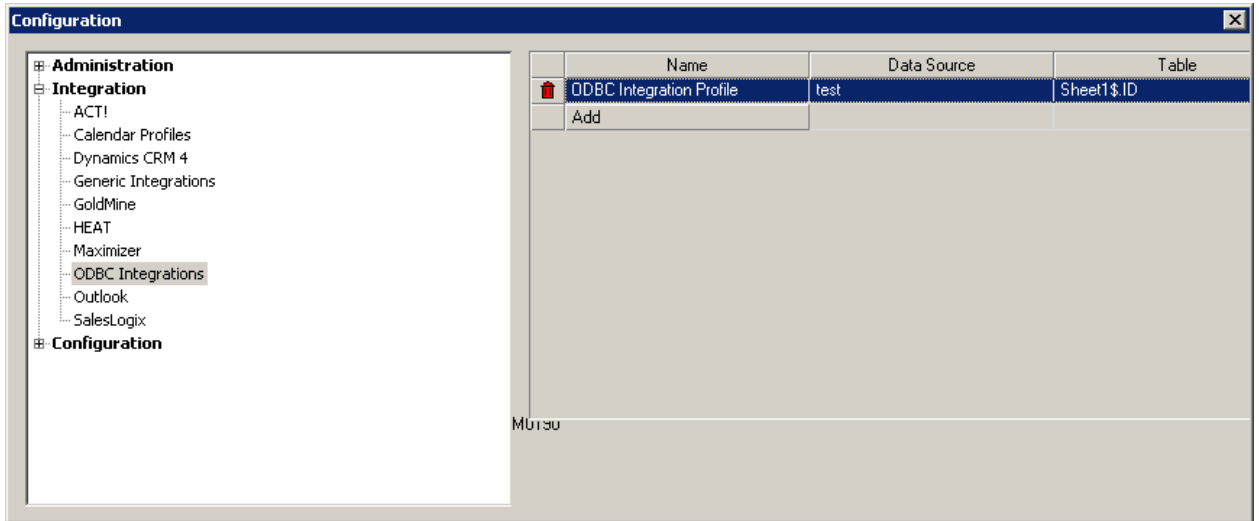
Username – The name of a valid Maximizer account.

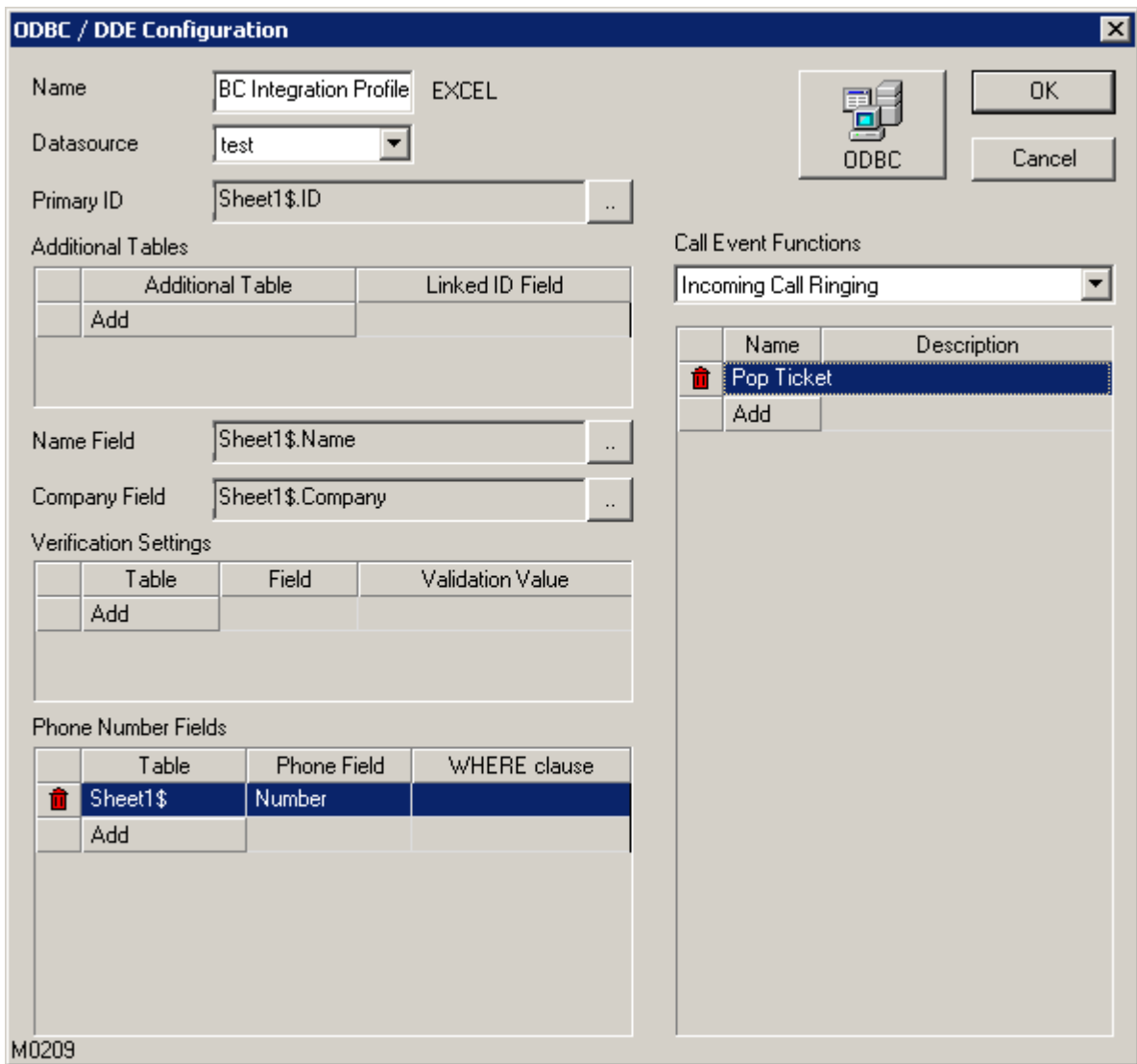
Password – The password to the Maximizer account.

6.2.8 ODBC Integrations

CCS Desk can be integrated with any application that supports ODBC and DDE. CCS Desk has the option to integrate with other applications such as Microsoft Access etc than just the applications listed in the CCS Desk Manager.

The ODBC tab within CCS Desk Manager contains a list of the ODBC integration profiles. A new integration profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Name – The name of the ODBC integration profile.

Datasource – The ODBC name that connects to the data source

Primary ID – The field in the ODBC data source that will be used as the contact identifier.

Additional Tables – Link multiple tables.

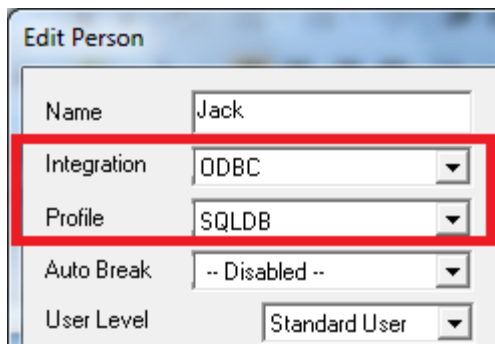
Name Field – The field in the ODBC data source that will be used as the name of the contact.

Company Field – The field in the ODBC data source that will be used as the company name of the contact.

Verification Settings – The field in the ODBC data source that will be used to verify the validity of the record.

Phone Number Fields – The field in the ODBC data source that contains phone numbers of the contact. This will be matched against the caller number of the active call. Multiple fields can be added into the list.

The 'Integration' setting must be changed to *ODBC* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.

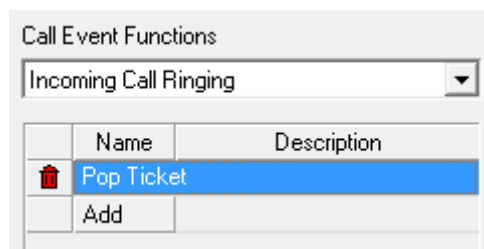


The screenshot shows a window titled "Edit Person" with several configuration fields. The "Integration" dropdown menu is set to "ODBC" and the "Profile" dropdown menu is set to "SQLDB". These two fields are enclosed in a red rectangular box. Other fields include "Name" (Jack), "Auto Break" (-- Disabled --), and "User Level" (Standard User).


6.2.8.1 Call Event Functions

The Call Event Functions table is used to trigger actions to occur when certain events are fired, such as when an incoming call starts ringing, when an incoming call is answered and when campaign calls are presented.

A new function can be added by clicking on the 'Add' button in the 'Call Event Functions' list, and an existing one can be deleted by clicking on the 'red bin' icon.



The screenshot shows a window titled "Call Event Functions" with a dropdown menu set to "Incoming Call Ringing". Below the dropdown is a table with two columns: "Name" and "Description". The table contains one entry: "Pop Ticket" with a red bin icon to its left. Below the table is an "Add" button.

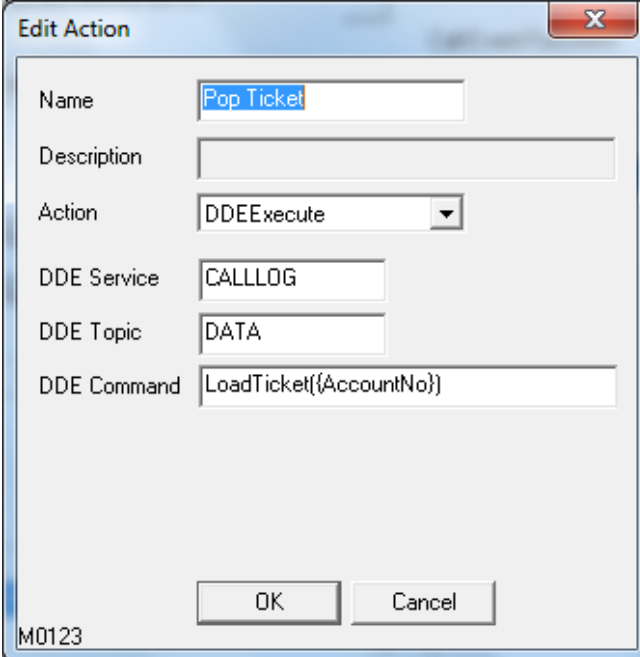
	Name	Description
	Pop Ticket	

Name – The name of the action.

Description – Text to describe the configured action.

Action – The list of actions that can be performed. We will not explain every action in detail with this document.

- **DDEExecute** – Connects to a third party DDE Service and send commands.



The screenshot shows a dialog box titled "Edit Action" with a close button (X) in the top right corner. The dialog contains several input fields and a dropdown menu:

- Name:** Pop Ticket
- Description:** (Empty text box)
- Action:** DDEExecute (selected in a dropdown menu)
- DDE Service:** CALLLOG
- DDE Topic:** DATA
- DDE Command:** LoadTicket({AccountNo})

At the bottom of the dialog, there are two buttons: "OK" and "Cancel". In the bottom left corner, the text "M0123" is visible.

- **Pop Access 2007** – Opens a form in Microsoft Access.

The screenshot shows a dialog box titled "Edit Action" with a close button (X) in the top right corner. The dialog contains the following fields:

- Name: LaunchSurvey
- Description: (empty)
- Action: Pop Access 2007 (dropdown menu)
- ID Field: ContactID
- Form Name: MyForm
- Database Name: myaccess.accdb

At the bottom of the dialog are "OK" and "Cancel" buttons. The text "M0123" is visible in the bottom left corner of the dialog box.

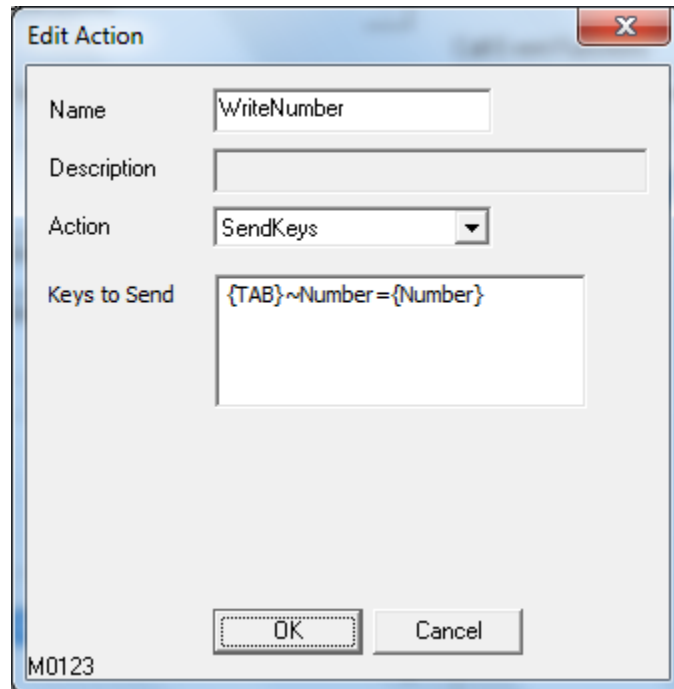
- **ShellExecute** – Starts an external application.

The screenshot shows a dialog box titled "Edit Action" with a close button (X) in the top right corner. The dialog contains the following fields:

- Name: LaunchSurvey
- Description: (empty)
- Action: ShellExecute (dropdown menu)
- ShellExecute Command: iexplore "http://intranet/surveyform.asp?id={AccountNo}"
- Parameters: (empty)

At the bottom of the dialog are "OK" and "Cancel" buttons. The text "M0123" is visible in the bottom left corner of the dialog box.

- **SendKeys** – A well-documented function within languages such as Visual Basic or C#, where ‘special keys’ are enclosed in curly braces, such as {TAB}.



And many more.

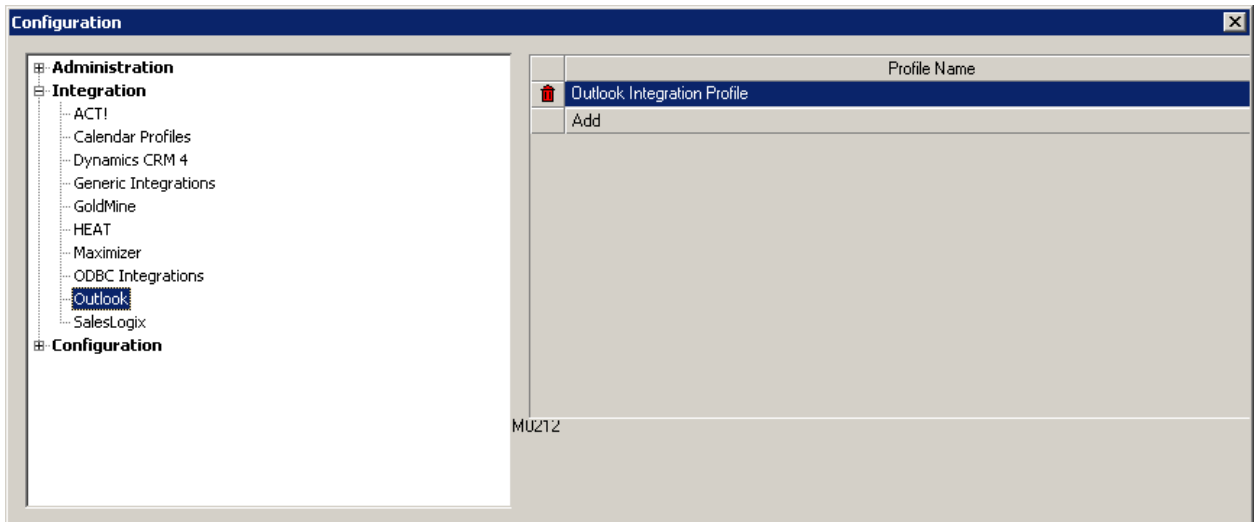
6.2.8.2 Additional Client Configuration

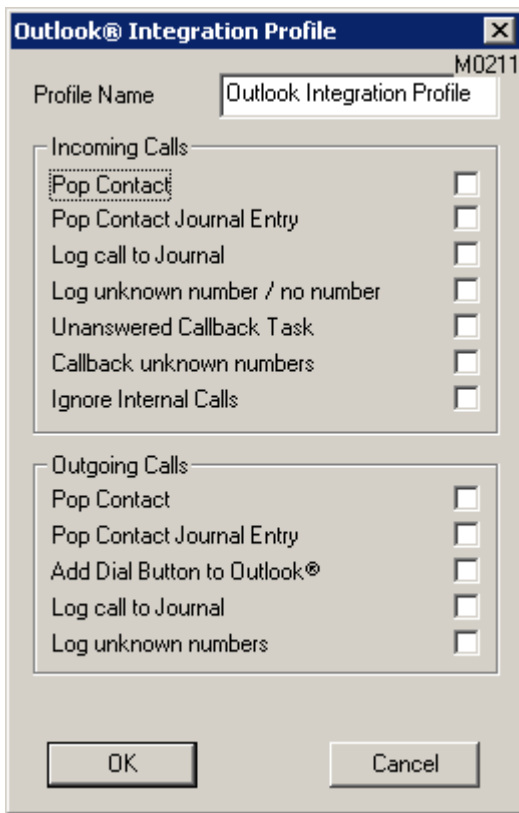
The ODBC data source, with the exact same name and configuration, must exist in each agent machines.

6.2.9 Outlook®

When CCS Desk is integrated with Outlook, it provides services such as popping a contact record on an incoming call, logging the call to the journal etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The Outlook tab within CCS Desk Manager contains a list of the Outlook integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Incoming Calls

Pop Contact – If the contact's number is found in the Outlook, the contact record will be opened in Outlook.

Pop Contact Journal Entry – A new window will be opened to create a journal for selected contact.

Log Call To Journal – A new journal entry will automatically be entered with every incoming call.

Log Unknown Number / No Number – Creates a new journal entry even when the contact is not found.

***Unanswered Callback Task** – Creates a new Outlook task for calls missed from a contact.

***Callback Unknown Numbers** – Creates a new callback task even for numbers not found in Outlook's contacts.

Ignore Internal Calls – Internal calls do not cause screen pop or actions.

**The unanswered callback feature should only be selected if an incoming call rings on one CCS Desk agent only. Otherwise all the agents who did not answer the call will receive a missed call record and a call back scheduled.*

Outgoing Calls

Pop Contact – If the contact's number is found in the Outlook, the contact record will be opened in Outlook.

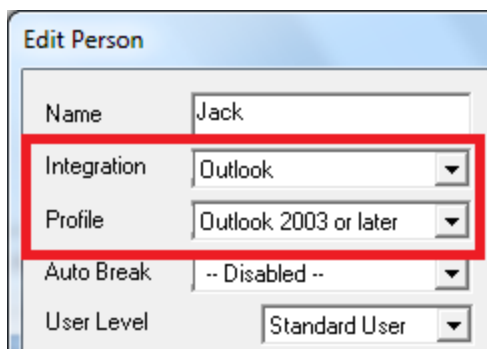
Pop Contact Journal Entry – A new window will be opened to create a journal for selected contact.

Add CCS Desk Button to Outlook – A button will be added to Outlook toolbar for dialing.

Log Call to Journal – A new journal entry will automatically be entered with every outgoing call.

Log Unknown Numbers – Creates a new journal entry even when the contact is not found.

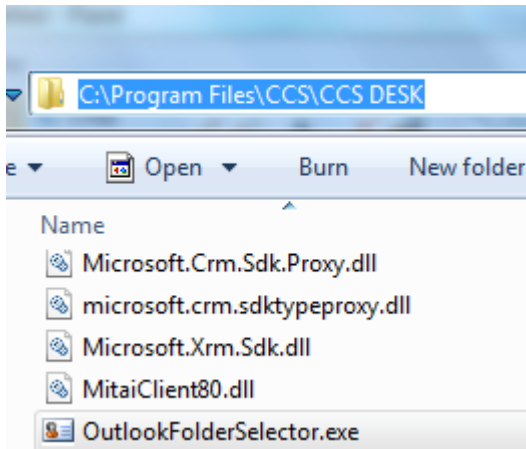
The 'Integration' setting must be changed to *Outlook* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



Both CCS Desk and Outlook must be running for this integration to work.

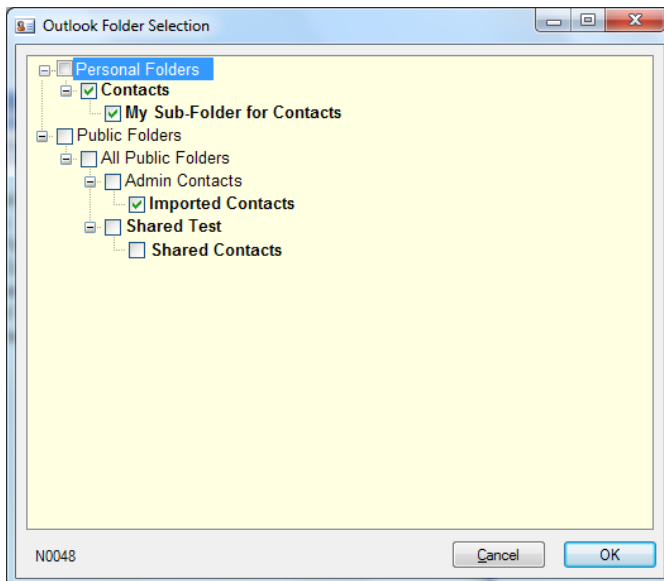
6.2.9.1 Additional Client Configuration

CCS Desk Outlook Integration does not automatically use every possible Contact folder in a user's Outlook. By default, it will only use the 'Contacts' folder. To use contacts from folders other than the 'Contacts' folder, run the *OutlookFolderSelector.exe* application which can be found in the installation folder for CCS Desk.



This application allows the agent to select any other Contact folders that are to be used. The 'Contact' folders are shown in **Bold** font. Simply check the folders that contain the contacts you wish to integrate. The next time you restart CCS Desk, the contacts inside the selected folders will be used as part of the Outlook integration.

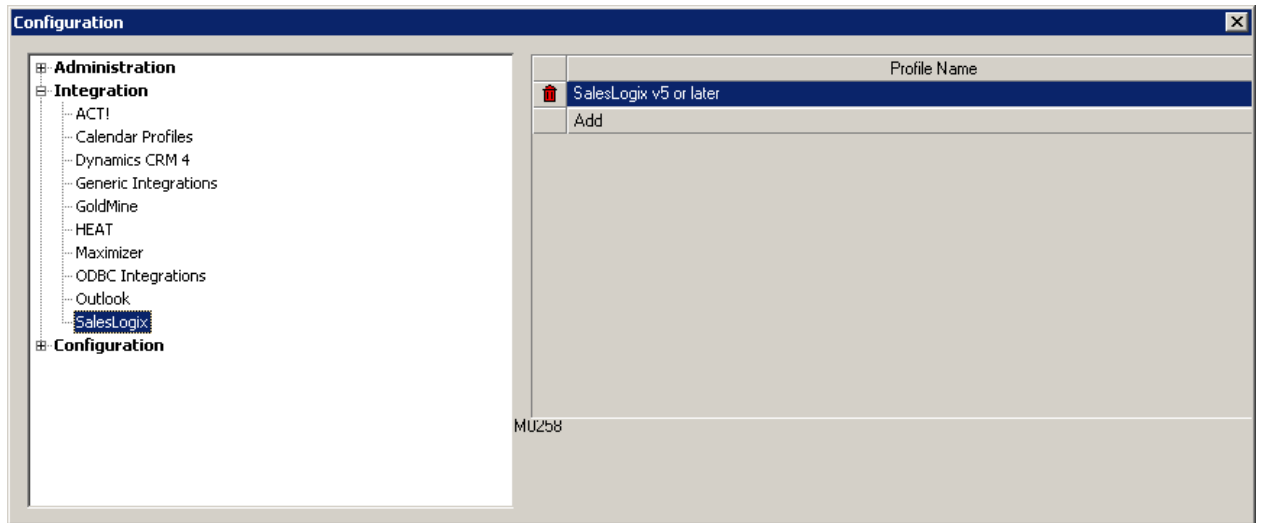
This is a local setting that applies only to the local workstation and must be repeated if agent has multiple workstations.

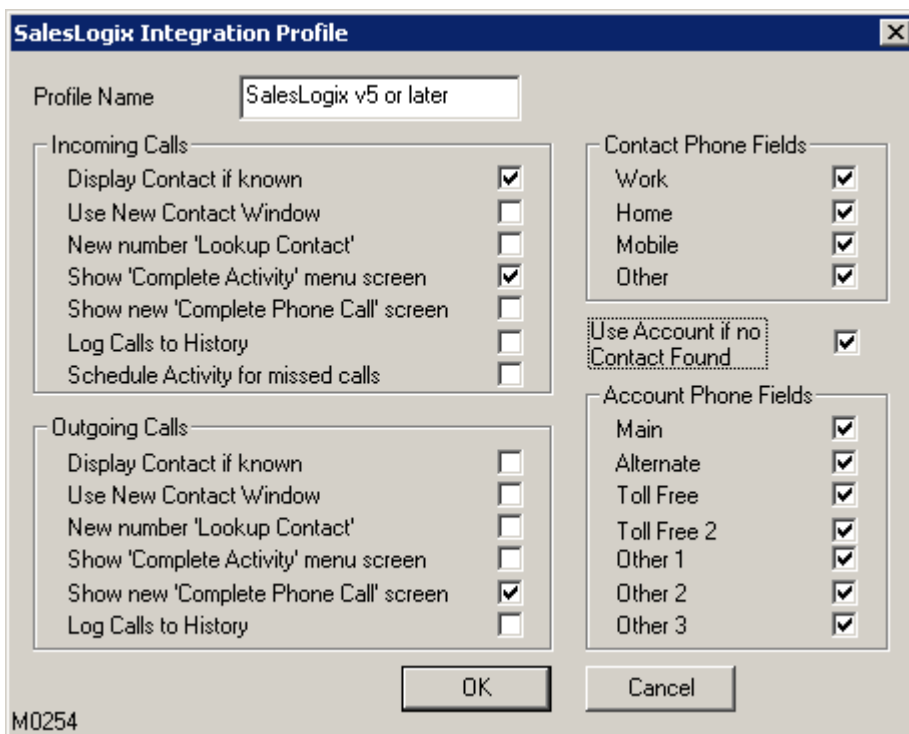


6.2.10 SalesLogix

When CCS Desk is integrated with SalesLogix, it provides services such as popping a contact record on an incoming call, dialing contact numbers from within SalesLogix etc. Sets of configuration options can be grouped into profiles, and these profiles are assigned to agents. This ensures that a set of agents all have the same options set and allows flexibility in the options agents can possess.

The SalesLogix tab within CCS Desk Manager contains a list of the SalesLogix integration profiles. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Incoming Calls

Display Contact if known – Display their SalesLogix contact record if the number of the caller is known.

Use New Contact Window – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed

New Number Lookup Contact - In the case that the number of an incoming call is not found in the contact database, a Lookup Contact window to be displayed.

Show 'Complete Activity' menu screen – When an incoming call results in an identified contact, a complete activity item is opened, linked to the contact.

Show new 'Complete Phone Call' screen – When an incoming call results in an identified contact, a complete phone call item is created, linked to the contact.

Log Calls to History – Generate automatic entries into the SalesLogix History.

Schedule Activity for missed calls - When enabled, an Activity will be scheduled to return the missed call.

Outgoing Calls

Display Contact if known – Display their SalesLogix contact record if the number of the caller is known.

Use New Contact Window – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed

New Number Lookup Contact - In the case that the number of an incoming call is not found in the contact database, a Lookup Contact window to be displayed.

Show 'Complete Activity' menu screen – When an incoming call results in an identified contact, a complete activity item is opened, linked to the contact.

Show new 'Complete Phone Call' screen – When an incoming call results in an identified contact, a complete phone call item is created, linked to the contact.

Log Calls to History – Generate automatic entries into the SalesLogix History.

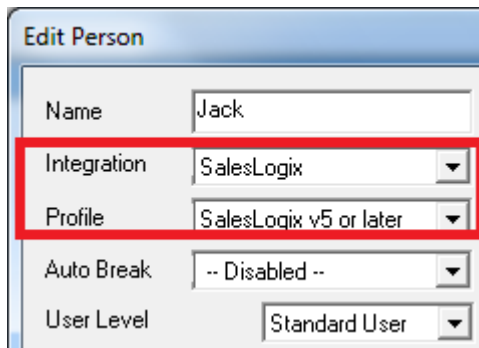
Other Options

Contact Phone Fields – Tick all SalesLogix contact phone fields that will be integrated with CCS Desk.

Use Account if no Contact found – When enabled, the system searches Account if there is no match with Contact.

Account Phone Fields – Tick all SalesLogix account phone fields that will be integrated with CCS Desk.

The 'Integration' setting must be changed to *SalesLogix* and the profile can be selected from the 'Profile' drop down list in the Agent configuration screen as shown below.



The screenshot shows a dialog box titled "Edit Person" with the following fields:

Name	Jack
Integration	SalesLogix
Profile	SalesLogix v5 or later
Auto Break	-- Disabled --
User Level	Standard User

The "Integration" and "Profile" rows are highlighted with a red border.

Both CCS Desk and SalesLogix must be running for this integration to work.

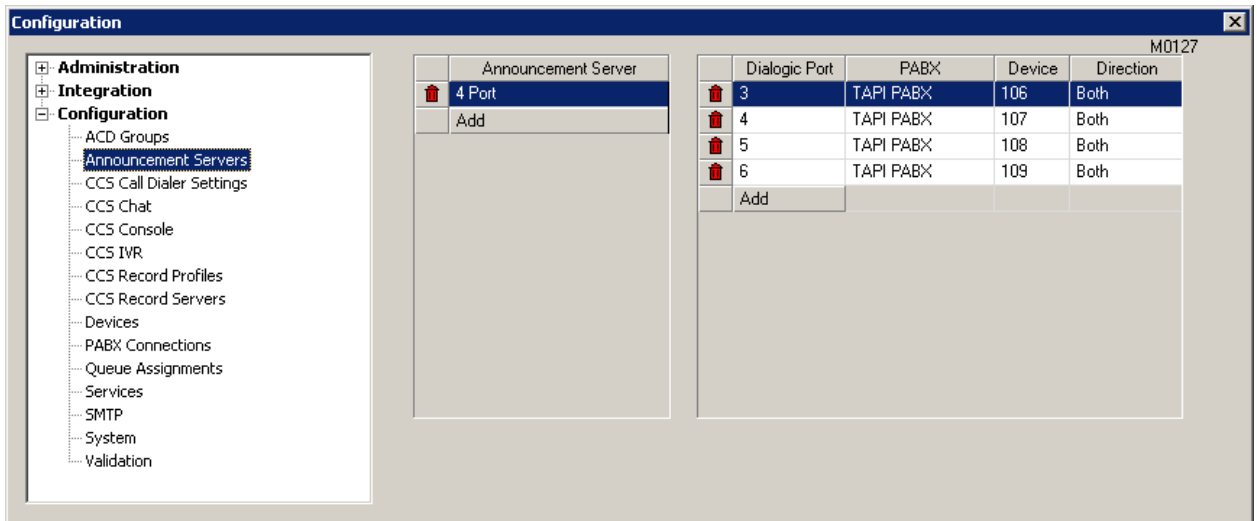
6.2.10.1 Additional Client Configuration
None

6.3 Configuration

6.3.1 Announcements Servers

This tab contains a list of Announcement Server profiles for call queuing and announcement services.

A new announcement server profile can be added by clicking on the 'Add' button in the 'Announcement Server' list, and an existing one can be deleted by clicking on the 'red bin' icon.



Announcement Server

The screenshot shows a configuration window titled "4 Port" with a close button (X) in the top right corner. The window has five tabs: "Announcement Server", "HMP", "DTMF", "Tones", and "In-Band". The "Announcement Server" tab is selected. The configuration fields are as follows:

- Name: 4 Port
- Incoming Calls: Bottom Up
- Outgoing Calls: Top Down
- Default Queue: Disabled
- Volume: Default
- Number of rings: 1 Ring

Below these fields is a section titled "Call Pickup Settings" with the following options:

- Use Call Pickup Mode:
- Call Pickup Code: *7
- Redirect Group: (empty field)
- Reconnect Code: &.

At the bottom of the window are "OK" and "Cancel" buttons.

Name – The name of the CCS Announce profile.

Incoming Calls – This drop-down allows the user to decide if announcement ports will be assigned based on first to last, last to first or longest available.

Outgoing Calls – This drop-down allows the user to decide if announcement ports will be assigned based on first to last, last to first or longest available.

Default Queue – Queue to use if no other queue matches.

Volume – increase or decrease the audio level when announcements are being played.

Number of Rings – Sets number of rings before a call ringing into CCS Q is answered.

Call Pickup Settings

Use Call Pickup Mode – When enabled, unanswered queue calls ringing at the agent will be picked up by the port using the 'Call Pickup Code'. If this option is disabled, the pickup will be attempted using CTI which may not be supported in most CTI implementations.

Call Pickup Code – Code used for direct call pickup in a PABX.

Reconnect Code – Digits to reconnecting a failed transfer with CCS Desk Mobile.

HMP

The screenshot shows a configuration window titled "4 Port" with a tabbed interface. The "HMP" tab is selected. On the left, there is a checkbox for "HMP SIP Ports" which is currently unchecked. Below it are two IP address input fields, both containing "1 . 1 . 1 . 1". The first is labeled "SIP PABX IP Address" and the second is labeled "Host IP Address to use". At the bottom left, there are two buttons: "Copy Password from first port to all other ports" and "Set All Passwords to extension number". On the right side of the window, there is a table with three columns: "Port", "Number", and "Spare".

Port	Number	Spare
3	106	No
4	107	No
5	108	No
6	109	No

At the bottom of the window are "OK" and "Cancel" buttons.

HMP SIP Ports – Enables CCS Announce integration with HMP.

SIP PABX IP Address – Sets the SIP PABX IP Address to use

Host IP Address to use – Sets the host IP Address to use

Copy Password from first port to all other ports – Copies the set password on the first port to all other ports

Set All Passwords to extension number – Sets all passwords to extension number

DTMF

The screenshot shows a configuration window titled "4 Port" with a close button (X) in the top right corner. The window has five tabs: "Announcement Server", "HMP", "DTMF", "Tones", and "In-Band". The "DTMF" tab is selected. The window is divided into two main sections. The first section, "Dialing Parameters", contains four settings: "DTMF On Duration" set to "140ms", "Flash Duration" set to "100ms", "Call Transfer String" set to "&,%s", and "Pause Duration" set to "1000ms". The second section, "Callback in Queue Settings", contains three settings: "First Digit Duration" (empty), "Inter Digit Duration" set to "5 secs", and "Total Duration" set to "10 secs". At the bottom right of the window are "OK" and "Cancel" buttons.

Dialing Parameters

DTMF On Duration – Length of time between dialing each digit and length of time for each digit.

Flash Duration – Duration of hook flash.

Call Transfer String – This is always set as displayed.

- **Ampersand '&'** – Hook flash.
- **Comma ','** – Pause.
- **%s** – Device number.

Pause Duration – Length of pause in the transfer.

Callback in Queue Settings

First Digit Duration – The amount of time to wait for the first digit of the callback phone number before timing out.

Inter Digit Duration – The amount of time to wait for the subsequent digits of the callback phone number before timing out.

Total Duration – The total amount of time to allow the caller to enter their number before timing out.

Tones

The screenshot shows a configuration window titled "4 Port" with a close button (X) in the top right corner. The window has several tabs: "Announcement Server", "HMP", "DTMF", "Tones", and "In-Band". The "Tones" tab is selected. Inside the window, there is a section titled "Disconnect Tone Detection" which contains the following settings:

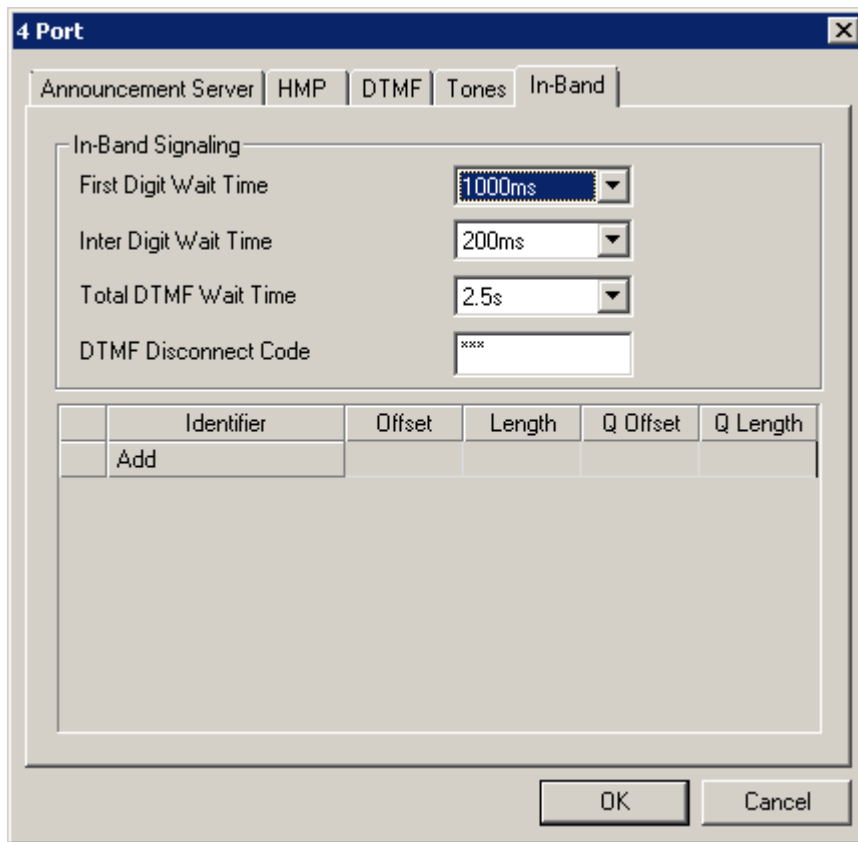
Tone 1 (Hz)	425
Tone 1 Deviation (Hz)	30
Dual-Tone Disconnect Tone	<input type="checkbox"/>
Tone 2 (Hz)	-1
Tone 2 Deviation (Hz)	-1
Tone On Time (x10ms)	50
Tone Off Time (x10ms)	250

At the bottom of the window, there are two buttons: "OK" and "Cancel".

Disconnect Tone Detection

If required the disconnect tone settings is needed to be configured to match the settings in PBX.

In-Band



In-Band Signaling

CCS Q may receive digits from certain PABX systems to identify where the call is forwarded from. The digits are then used to identify which queue the call is for, by matching them against the Queue In-Band Identifier value.


First Digit Wait Time – Time before first digit.

Inter-Digit Wait Time – Time between digits.

Total DTMF Wait Time – Total time for number dialed.

DTMF Disconnect Code - If CCS Announce receives the code entered here during the sequence of the call, it will take that to mean that the PABX has disconnected the call.

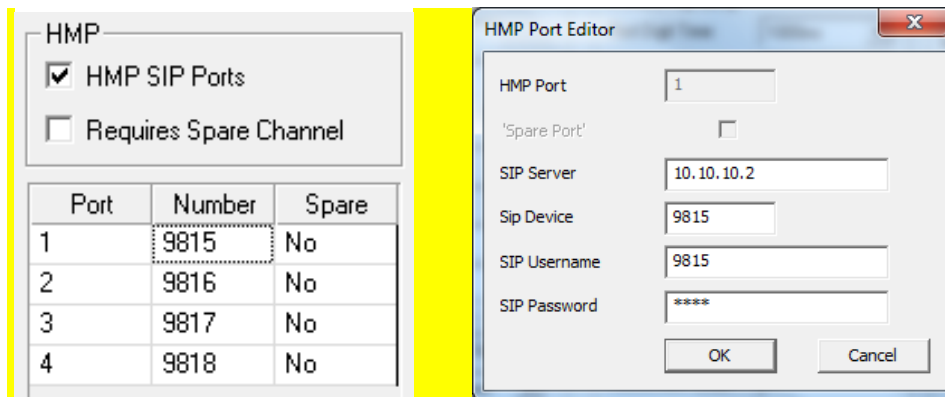
Identifiers

	Identifier	Offset	Length	Q Offset	Q Length
	7	0	1	0	3
	Add				

Identifier – Defines how the digits from the PABX specify which queue the call is for. In the above example, any 3 digit number starting with a 7 can be used as an identifier.

Requires Spare Channel – Spare SIP channels are required when performing certain call functions with HMP.

The ports below are a reflection of the configuration in the next section. Double click on each port to open the HMP Port Editor.

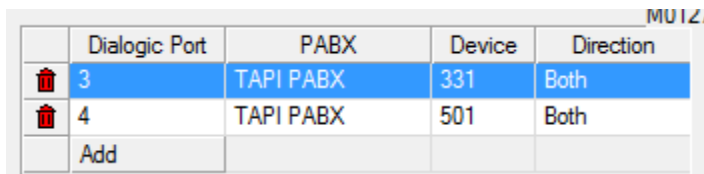




SIP Server – the IP address of the SIP host, usually the PBX itself.

SIP Device – the extension number

SIP Username – must be entered with the authorized username for each SIP device.

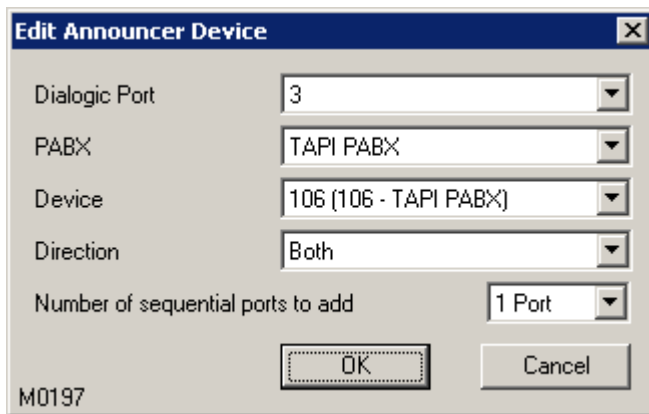
SIP password – must be entered with the password for each SIP device.



	Dialogic Port	PABX	Device	Direction
	3	TAPI PABX	331	Both
	4	TAPI PABX	501	Both
	Add			

This lists the Dialogic ports assignments.

A new announcement port can be added by clicking on the 'Add' button in this list, and an existing one can be deleted by clicking on the 'red bin' icon.



Edit Announcer Device

Dialogic Port: 3

PABX: TAPI PABX

Device: 106 (106 - TAPI PABX)

Direction: Both

Number of sequential ports to add: 1 Port

OK Cancel

M0197

Dialogic Port – The port number on the Dialogic board / HMP

PABX – The PABX integration profile of the device connected to the Dialogic port.

Device – The device number connected to the Dialogic port.

Direction – Specifies whether this port is for incoming calls, outgoing calls or either.

Number of sequential ports to add – When creating a new port, this feature helps to create additional x ports assuming the device connected to the subsequent ports is sequential. In this above example, it will assume that port 4 is connected to 332; port 5 is connected to 333 etc.

Note that this setting is very critical and must be configured correctly.

6.3.2 CCS Call Dialer Settings

The CCS Call Dialer Settings tab provides configuration options for the Pre-emptive dialer. Multiple profiles can be configured based on the desired rates of dialling and unsuccessful call classification.

Dialer Settings

Profile Name:

Transfer Mode:

Auto-Completion Selection:

- Busy:
- No Answer:
- Answer Machine:
- Unobtainable:
- No Agents Free:
- Fax Tone:

Calls : Agents Ratios:

- Up to 1:
- Up to 2:
- Up to 3:
- More agents:

Answer Detection:

- Inter Word Delay: x10 ms
- Maximum Answer Length: x10 ms
- No Answer Delay: x10 ms

OK Cancel

M0166

Transfer Mode – How the successful pre-emptive call will be transferred to the agent.

- **Dialogic Transfer** – Uses the Dialogic hardware to transfer.
- **CTI Blind Transfer** – Uses the CTI Blind Transfer function to transfer. This is the most recommended mode.
- **Park/Unpark** – Uses Park devices to ‘transfer’ the call.
- **CTI Redirect** – Uses the CTI Redirect function to transfer.

Auto-Completion Selection – unsuccessful calls will be automatically completed with a completion code. There are several reasons the call is unsuccessful.

- **Busy** – Receives a busy tone.
- **No Answer** – The call rings but never answered.
- **Answer Machine** – The call goes to an answering machine e.g. voicemail.
- **Unobtainable** – The number is invalid.
- **No Agents Free** – The call is successful but there is no available agent to take the call.
- **Fax Tone** – Receives a fax tone.

Call : Agents Ratios - Represents the numbers of calls to be made on behalf of each available agent. The ratio is a reflection of the number of successful hits the user expects from the data (inaccurate phone data will result in a higher % of disconnected or invalid calls so the ratio would be higher, i.e. more calls must be made to make a successful connection)

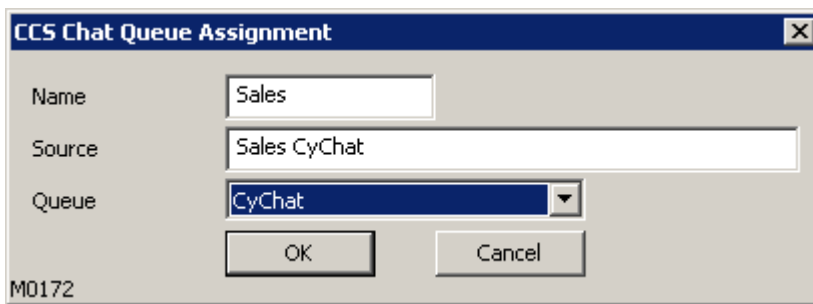
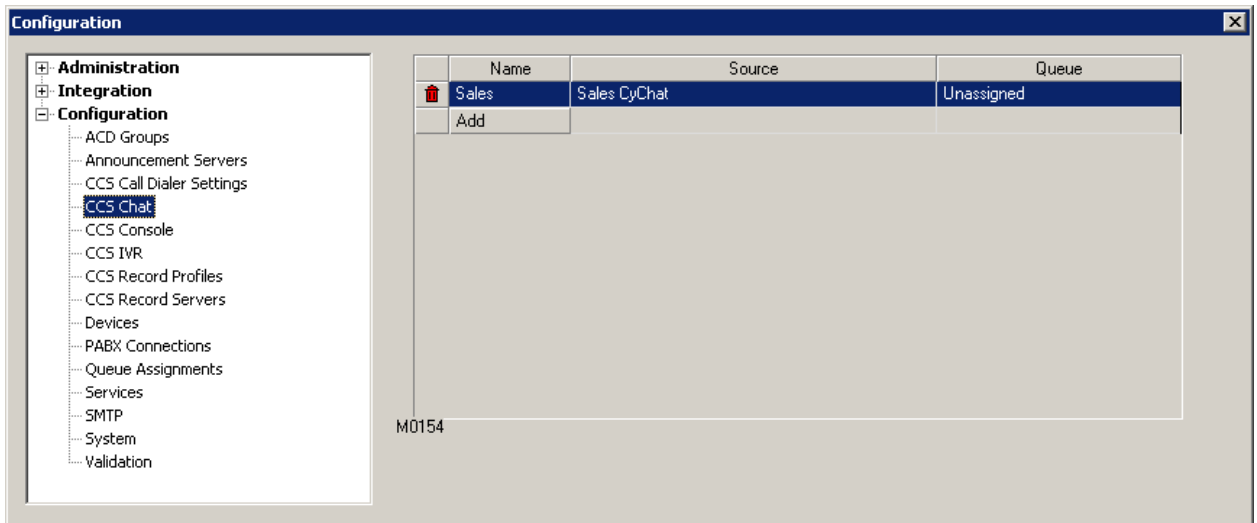
- **Up to** – The number of agent that a particular ratio is going to apply to.
- **Ratio** – The number of calls to be made when available agent is less than or equal to the value in 'Up to'.

Answer Detection – The logic behind the decision whether a call is successful or unsuccessful.

- **Inter Word Delay** – Delay between words used to identify an answer machine.
- **Maximum Answer Length** – The maximum time a call expected to answer, used to distinguish between a real answer and answer machines.
- **No Answer Delay** – Time delay for No Answer result for the call

6.3.3 CCS Chat

The configurations in this tab will allow integration to the CCS Chat Web Server. This configuration allows CCS Q to accept web chat request and queue them to the next available agents in the queue. A new web chat integration profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



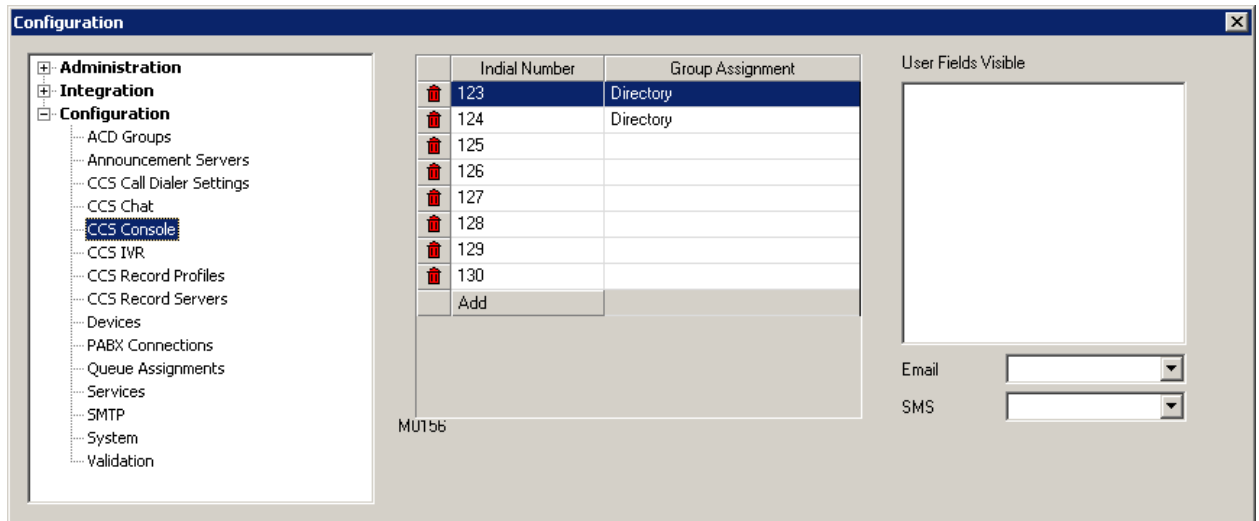
Name – the name of the integration profile.

Source – The identification value from CCS Chat.

Queue – The queue where the web chat request will be assigned to. (Queue type: Queue)

6.3.4 CCS Console

CCS Console is designed specifically for front-desk operators and serviced office environment, where calls are centrally answered by the front-desk. The agent, however, must be able to identify the intended company or department and greet the callers properly. CCS Console integrates with CCS Report Directory.



Indial Number – To be matched against the called ID or DNIS value of the call. When it is a match, CCS Console will show the assigned group information while ringing. A new indial can be added by clicking on the ‘Add’ button in the Indial list, and an existing one can be deleted by clicking on the ‘red bin’ icon.

Group Assignment – The CCS Report Directory Group assigned to the ‘Indial Number’.

User Fields Visible - The CCS Report Directory Person fields that will be made visible in CCS Console. Only highlighted fields are made visible.

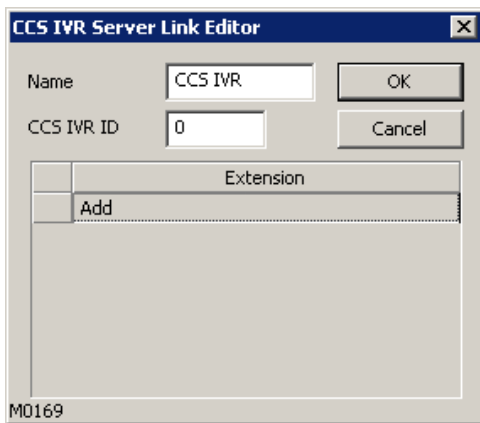
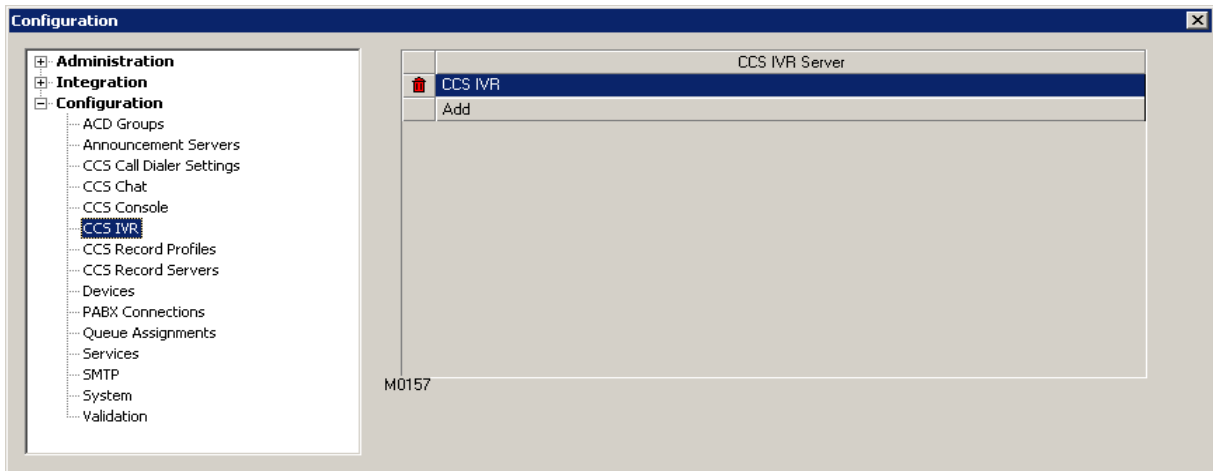
Email – The CCS Report Directory Person field that contain the email address of the person.

SMS – The CCS Report Directory Person field that contain the target number for SMS notifications.

6.3.5 CCS IVR

The configurations in this tab will allow integration to the CCS IVR Server. Each instance of CCS IVR needs to be configured CCS Q is going to be used to escalate calls into CCS IVR. This configuration allows CCS Q to determine which CCS IVR ports it can transfer to, and therefore it will always only transfer a call to an available port.

A new integration profile can be added by clicking on the ‘Add’ button, and an existing one can be deleted by clicking on the ‘red bin’ icon.



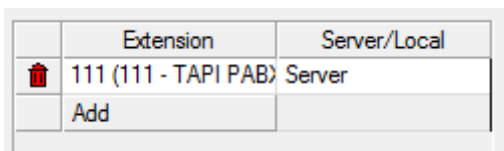
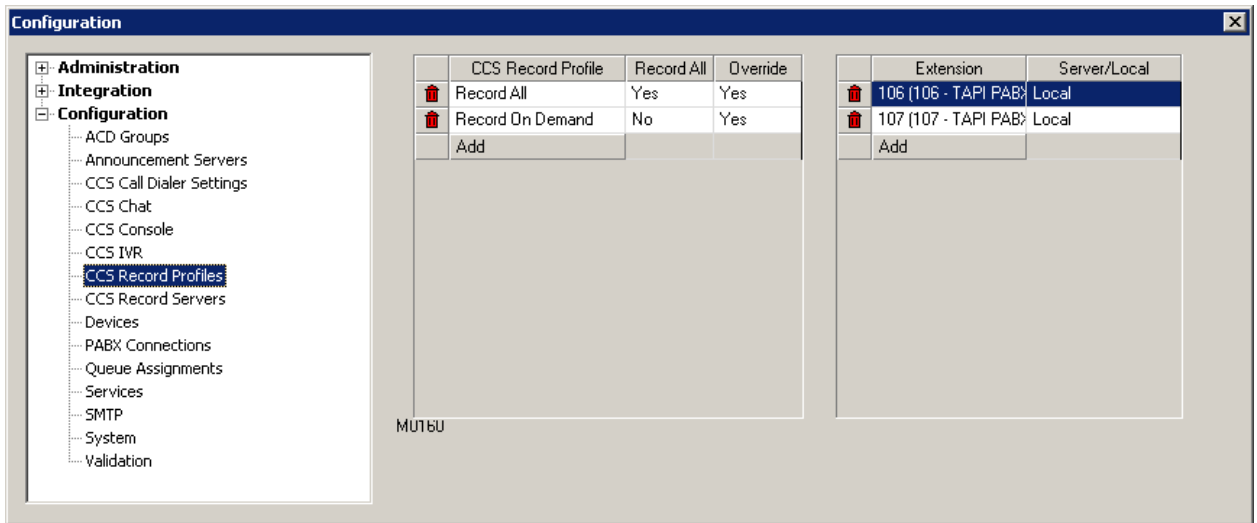
Name – The name of the profile.

CCS IVR ID – The license number of CCS IVR. This ensures that the correct messages go to the correct CCS IVR.

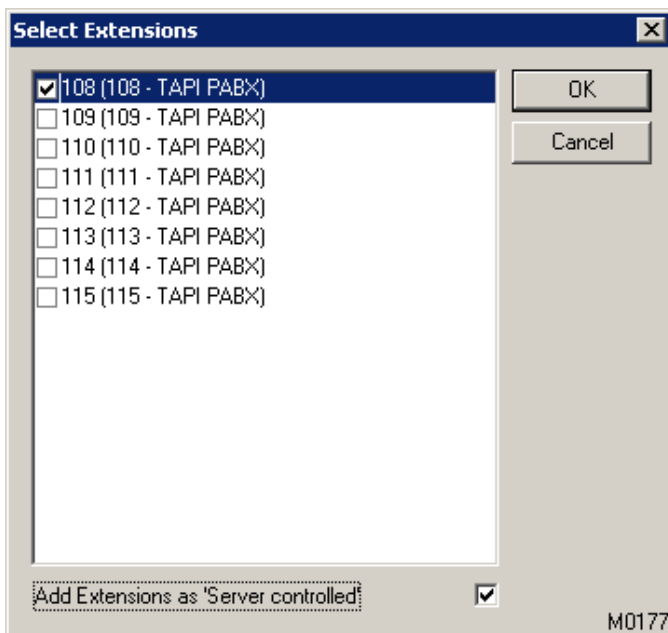
Extension – The list of devices connected to CCS IVR.

6.3.6 CCS Record Profiles



This tab provides additional configuration to complete the CCS Record configuration. Devices that need to be recorded are registered in this tab. Recording profiles for agents are also created in this tab.



A device can be added by clicking on the 'Add' button under the list on the right, and an existing one can be deleted by clicking on the 'red bin' icon. You cannot add more devices for recording than the number of recording devices mentioned in the CCS Desk license.



Add Extensions as 'Server Controlled' – When enabled, the devices will be available for selection in the CCS Record Server port configuration.

	CCS Record Profile	Record All	Override
	Record All	Yes	Yes
	Record On Demand	No	No
	Add		

A new CCS Record agent profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon. You cannot add more devices for recording than the number of recording devices mentioned in the CCS Desk license.

CCS Record Profile

Name: Record All [OK] [Cancel]

Override Local Settings:

Auto Record: Every Call

Hide 'No Device' Warning:

Option to Discard:

Recordings Folder: C:\CCS Record\

Folder Name:

- Agent Name:
- Queue Name:
- Campaign Name:

File Name:

- Agent Name:
- Phone Number:
- Contact ID:
- Completion Code:

Recording Format: MP3

Hide Recordings Tab:

Allow Stop:

Specify Types of call to AutoRecord

- Incoming Calls
- Outgoing Calls
- Queue Calls

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Name – the name of the CCS Record agent profile.

Override Local Settings – When enabled, the local CCS Record Options in CCS Desk will be overridden by the settings in this profile.

Auto Record – Enable this so call recording can automatically start at the following interval:

- **Every Call**
- **Every 2nd Call**
- **Every 3rd Call**
- **Every 4th Call**

- **Random**

Hide 'No Device' Warning – Disables the warning when agent is set with CCS Record profile however the device monitored by CCS Desk is not a device registered for recording.

Option to Discard – Prompts agent to either keep or delete the call recording.

Recordings Folder – The location where call recording files will be stored.

Folder Name

Agent Name – Creates a sub-folder in the recording path with the agent name.

Queue Name – Creates a sub-folder in the recording path with the queue name to store recording of calls related to a queue.

Campaign Name - Creates a sub-folder in the recording path with the campaign name to store recording of calls related to a campaign.

File Name

Agent Name – Includes the CCS Desk agent name in the recording filename.

Phone Number – Includes the dialed / caller number in the recording filename, if present.

Contact ID – When agent is integrated to a database or CRM application, and contact is found, it will include the contact identification in the recording filename.

Completion Code – Includes the completion code in the recording filename.

Recording Format – The audio file format, either WAV or MP3. The latter is 5 times more efficient in terms of size.

Hide Recordings Tab – Disables the Recording section in CCS Desk History panel.

Allow Stop – Agent will be able to use the 'Stop Recording' button to stop an automatically recorded call.

Specify Types of call to AutoRecord – When enabled, only the selected call types can be recorded.

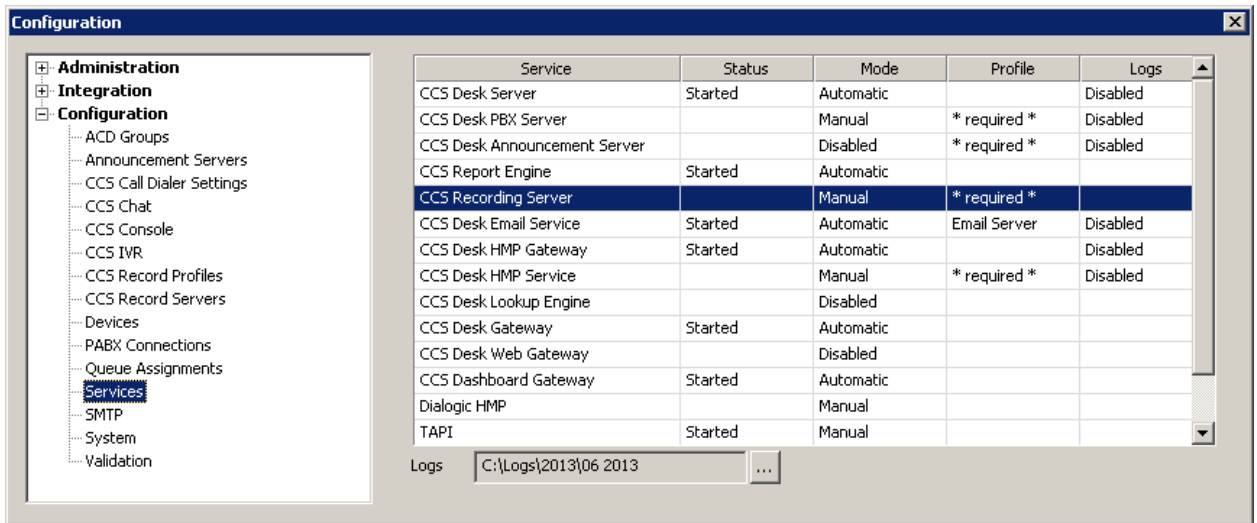
- **Incoming Calls** – Record all types of incoming calls i.e. both queue and non-queue calls.
- **Outgoing Calls** – Record all types of outgoing calls i.e. both queue and non-queue calls.
- **Queue Calls** – Record only queue related calls. If 'Incoming Calls' and / or 'Outgoing Call' is enabled as well, then this option is overridden.

6.3.7 CCS Record Servers

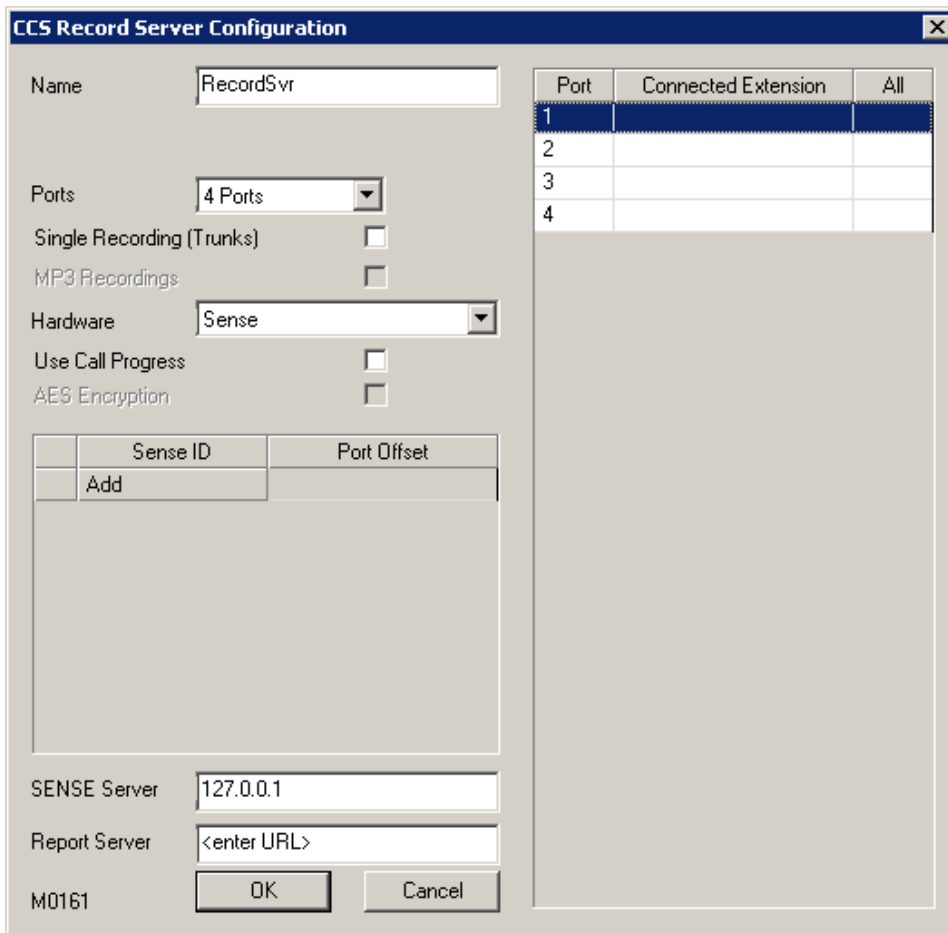
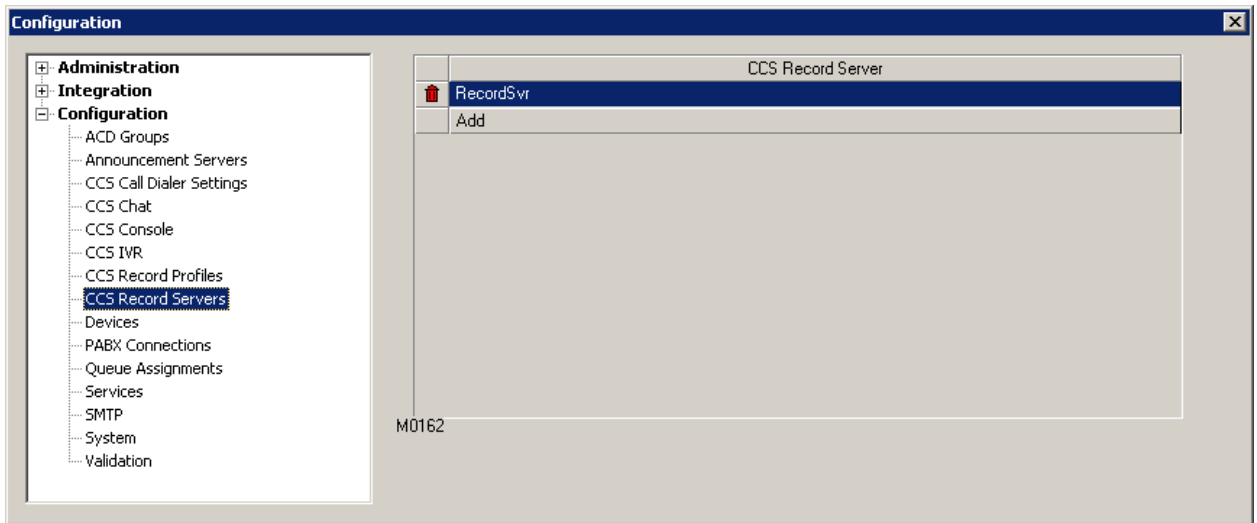
This tab contains a list of CCS Record Server configuration profiles for call recording.

The call recording feature requires the CCS Recording Server service to be installed. This service is included when CCS Desk is installed however it is not enabled by default.

Launch CCS Desk Manager. Go to the Services tab of the Configuration screen then install the CCS Recording Server service.



A new recording server profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Name – the name of the CCS Record Server profile.

Path – the default location where the recording files will be stored. This must be set as a network path. Note that this setting is not available when Hardware is configured as **Sense**.

Single Recording (Trunks) – When enabled, trunk recording will continue to record into the same file until the call has ended, regardless of how many times it is transferred within the PABX. Otherwise, multiple files will be created.

MP3 Recordings – Recordings will be recorded into WAV format unless this option is enabled. MP3 format is approximately 5 times more efficient compared to WAV. This setting is not available when Hardware is configured as **DIVA** or **Sense**



Hardware – The recording platform used by CCS Record.

- **Smartworks** – digital extension, analogue extension, ISDN PRI, trunk PSTN.
- **DIVA** – trunk BRI.
- **Sense** – the main recording platform. PSTN, ISDN PRI, ISDN BRI, VoIP trunk.

Use Call Progress – CCS Record will use the hardware signals to determine the start and end of the recording. When this option is not enabled, CCS Record relies on the CTI link. This option is not available when Hardware is configured as **Sense**

AES Encryption – When enabled, the files will be encrypted and can only be played back with CCS Report. This setting is not available when Hardware is configured as **DIVA** or **Sense**

Sense ID and **Port Offset** – This setting is only applicable when Hardware is configured as Sense. When there are multiple Sense recording devices connected to the server, the correct ID and Offset must be configured. Assuming there are two Sense recording devices, both with 4 ports, this is the correct ID and offset configuration.

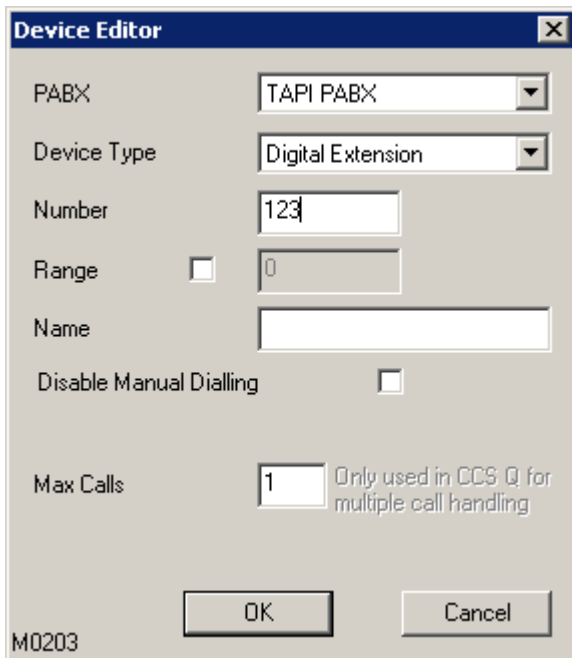
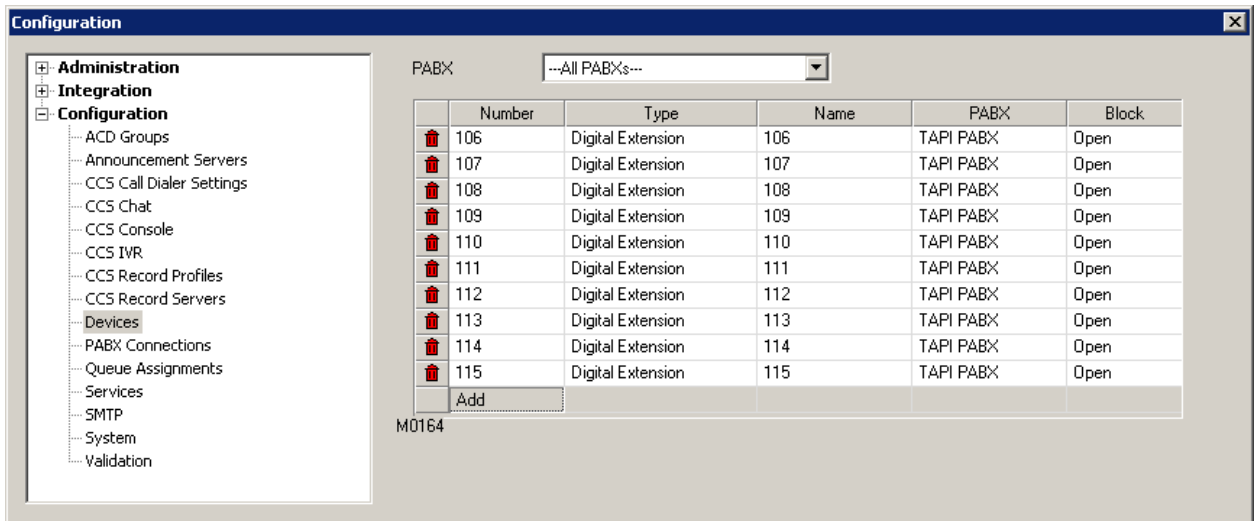
	Sense ID	Port Offset
	1	0
	2	4
	Add	

Ports – the amount of port configurations required

- **Port** – the port number.
- **Connected Extension** – the device physically connected to the port. Only devices registered in the CCS Record tab and set for server controlled can be added.
- **All** – Record all, or use the CCS Record profile configured in the Agent profile.

6.3.8 Devices

The Devices tab is used to configure devices attached to each PABX in your phone system. A new device can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



PABX – The PABX to which this device is attached.

Device Type – The type of the device being added.

- **Digital Extension** – devices for agent handsets.
- **Analog / SIP** – devices for CCS Q announcement ports or CCS Call dialing ports.
- **Park** – devices for Park / Unpark CCS Call pre-emptive dialing mode.
- **CTI Queuing Device** – devices to be used for CCS Q when keep calls on voiceboard.
- **Trunk** – phone lines for CCS Record trunk side recording.
- **Indial Extension** – devices to be used for CCS Q assignments.

Number – The device number.

Range - Add a range of devices by selecting this check box and entering the upper range in the text box and lower range in the Number text box.

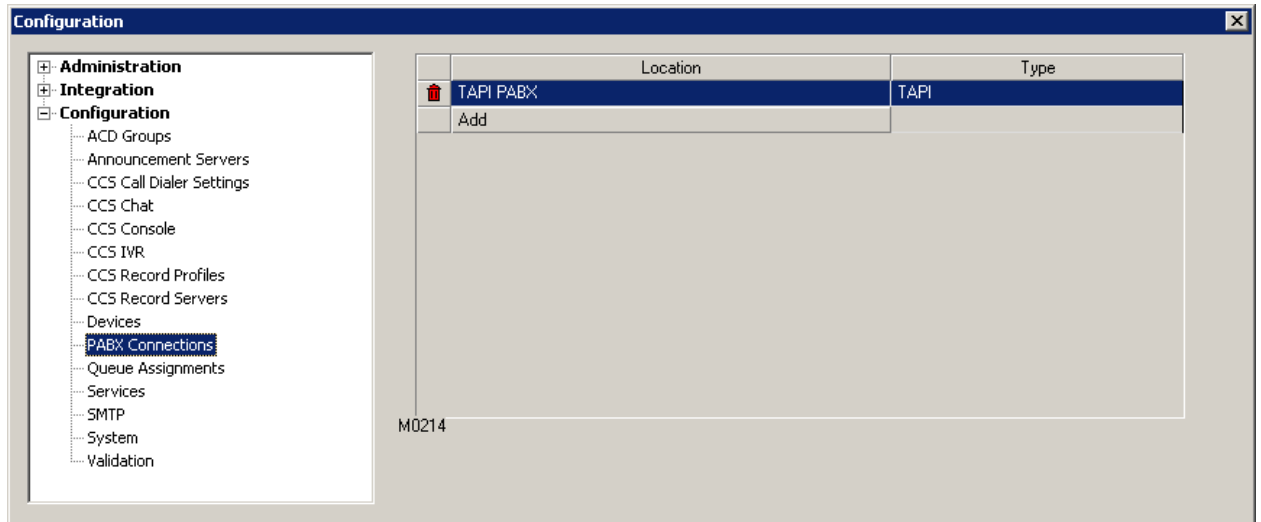
Name - The name to give this device. Names cannot be entered when adding a range of devices.

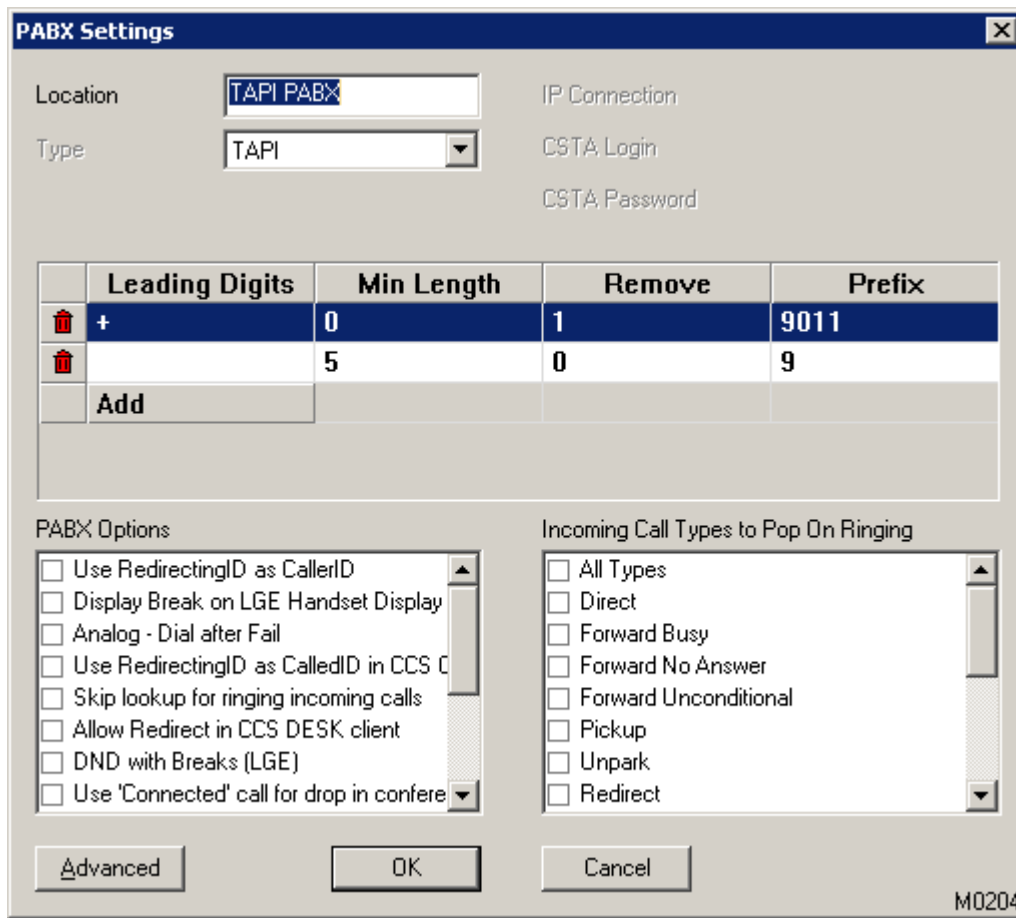
Disable Manual Dialing – If this option is enabled and the device is a digital extension, calls cannot be made from this device unless the call is initiated by CCS Desk. If enabled, this device will display as 'blocked' in the block column of the Devices tab.

Max Calls – The maximum number of call allowed for this device. If more than 1, CCS Q may send multiple calls to agent logged in on this device. The device must have multiple loop keys in order to support this feature.

6.3.9 PABXs

Different PABX integration profiles can be created in this tab. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



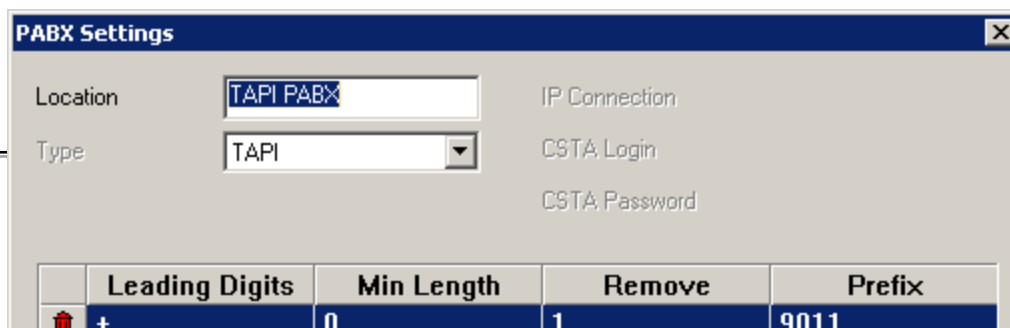


Location – the name of the PBX integration profile.

Type – CTI integration modes supported by CCS Desk.

- **TAPI** – the most common integration type that uses Microsoft Windows Telephony service.
- **Virtual** – CCS Desk simulation engine for testing and demonstration purposes only.

6.3.9.1 TAPI



Use RedirectingID as CallerID – When Caller ID is passed through in the 'Redirecting ID' field.

Display Break on LG Handset Display – This option enables LG-Ericsson specific functionality where the name of the agent break is displayed on the agent handset.

Analog - Dial after Fail – Enables click-to-dial with an analog extension. This will store the phone number so when the agent then lifts the handset the number will be dialled.

Use RedirectingID as CalledID in CCS Console – This allows CCS Console to use the 'RedirectingID' field in TAPI to look up the incoming destination of a telephone call.

Skip Lookup for ringing incoming calls – When enabled, incoming calls will only do database lookups, screen pops etc, after the incoming call has been answered to avoid multiple logs of the same call.

Allow Redirect in CCS Desk Client – When a call is ringing on a station, this will give the option to ‘redirect’ that call to another station without answering it. Many TAPI implementations report this feature as being available when it is in fact unavailable.

DND with Breaks (LGE) – When this option is enabled, CCS Desk will automatically place the agent’s extension on ‘Do Not Disturb’ when they go on a break – and take the DND off when the break ends.

Use ‘connected’ call from drop in conference – When a conference ends, CCS Desk will not disconnect the other ‘connected’ party.

Parked call stays Held – When enabled, calls placed on Park will be treated the same way as Hold.

Enable Park – Activates the Park feature in CCS Desk.

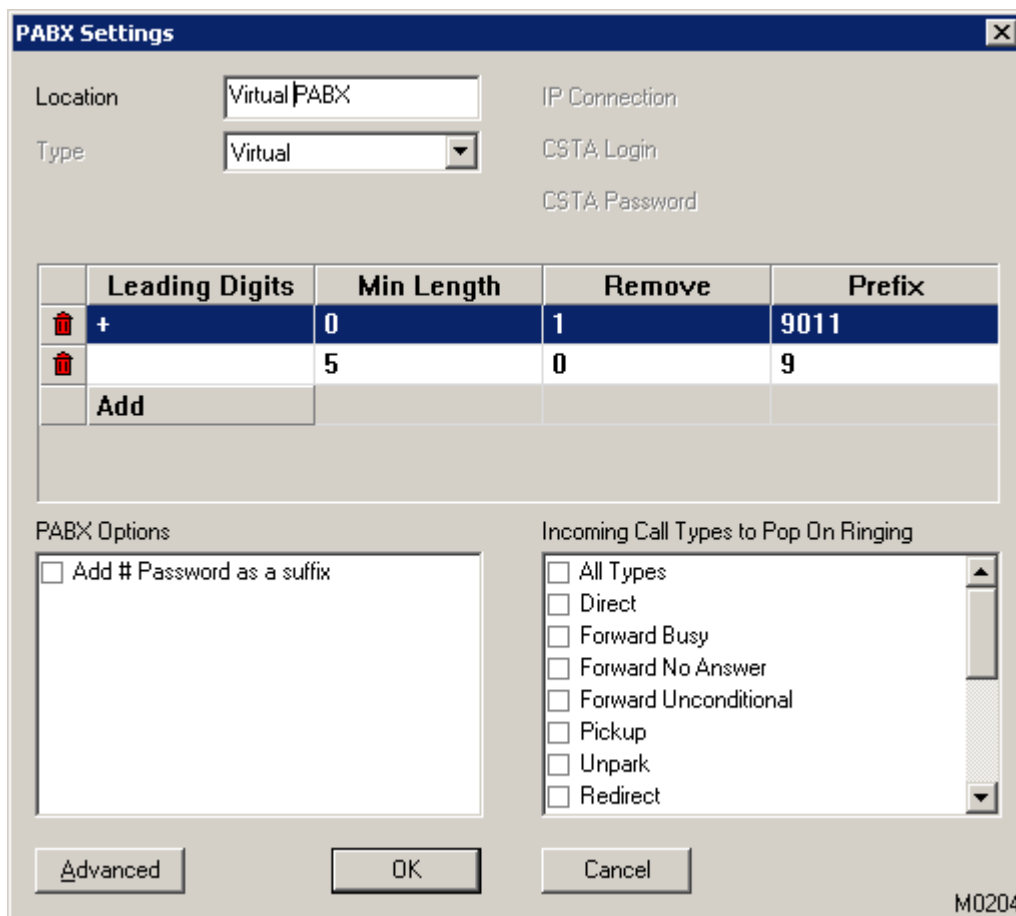
Use Blind Transfer for Announcement Server – Forces CCS Announce to use CTI Blind Transfer function when transferring a call from a queue. When this option is not enabled, the Dialogic Transfer method will be used.

Enable TAPI Conference – Activates the Conference feature in CCS Desk.

Allow ‘Unknown’ State Calls – Calls with ‘unknown’ call type are ignored by default. By enabling this feature, ‘Unknown’ calls will also be monitored and reported by CCS Desk.

Allow ‘Force Drop’ – Allows CCS Desk Client to remove active call on their extension from the system because that the call does not exist in reality. This is similar with ‘Clear Call From System’ feature on CCS Desk Manager. Please consult the *CCS Desk Manager – Clear Call From System section 2.7.2* for more information.

6.3.9.2 Virtual





Add # Password as Suffix – Append '#' and the CCS Desk agent's password into the dialed number.

6.3.9.3 Dialing Prefix

This option allows modification of the dialed number in order to meet the actual digits required by the telephony system to connect the destination number e.g. international numbers.

Certain characters such as brackets, whitespace, and dash are automatically removed by CCS Desk.

	Leading Digits	Min Length	Remove	Prefix
	+	0	1	9011
		5	0	9
	Add			

Leading Digits – the prefix required to use this rule.

Min Length – the minimum length of the dialed number required to use this rule.

Remove – the number of digits to be removed.

Prefix – a new prefix to be added into the dialed number string.

Note: only one matching rule will be used thus ensure that the most specific rule is entered first. With the example above:

<u>Dialed number</u>	<u>Result</u>
+61 123 456 7890	9 011 61 123 456 7890
1234567890	9 123 456 7890

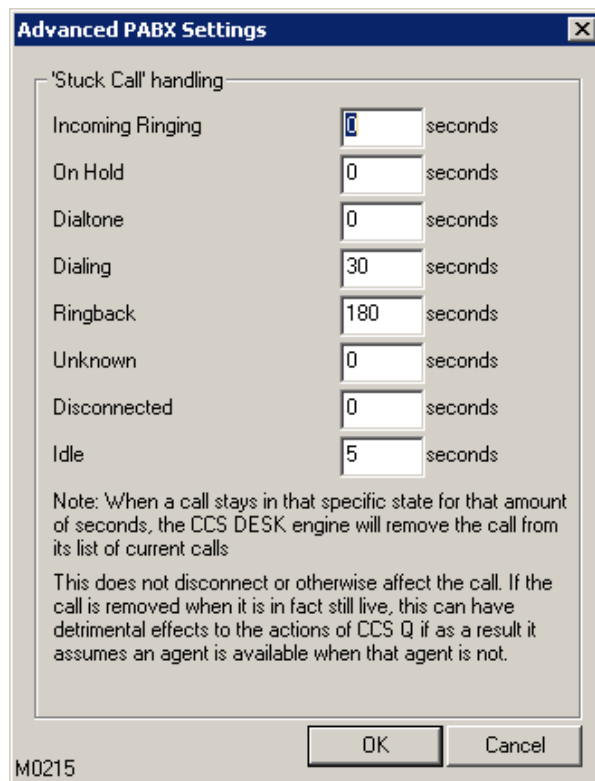
6.3.9.4 Incoming Call Types to Pop on Ringing

Under certain situations, such as where a ring group is in use, it is not always desirable to have the CCS Desk 'pop' a caller's record when the call is ringing. It would be better to only pop the caller's record once someone answers the call, otherwise every screen will change for no reason and also an unanswered call might be logged against each person when in fact it shouldn't be.

If the user selects 'All Types' the option will be turned on for all of the other check boxes. Additionally, if no options are selected it will have the same effect as if all options were selected.

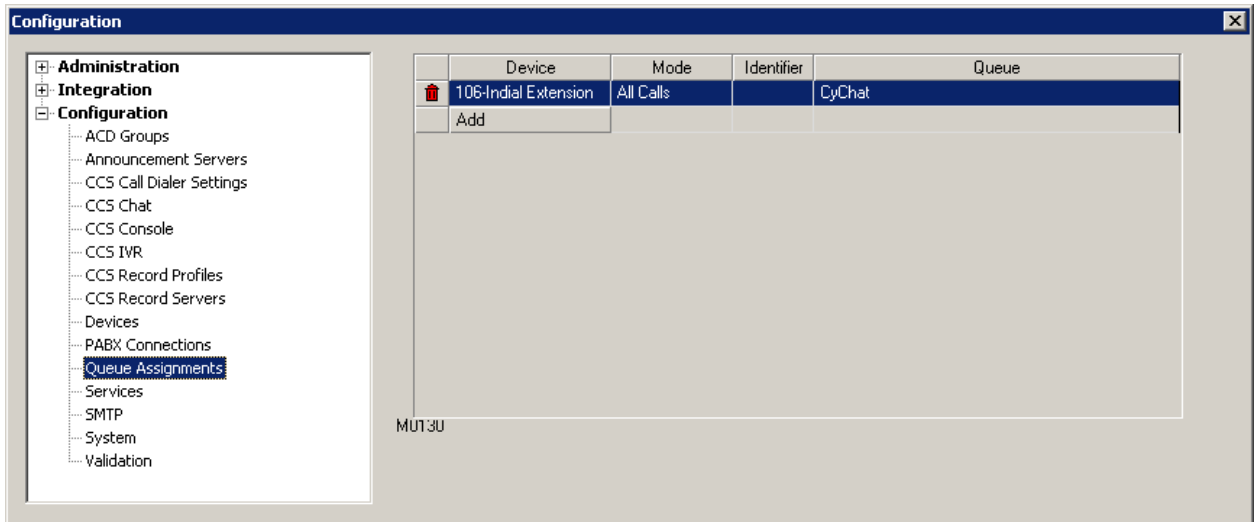
6.3.9.5 Advanced Options

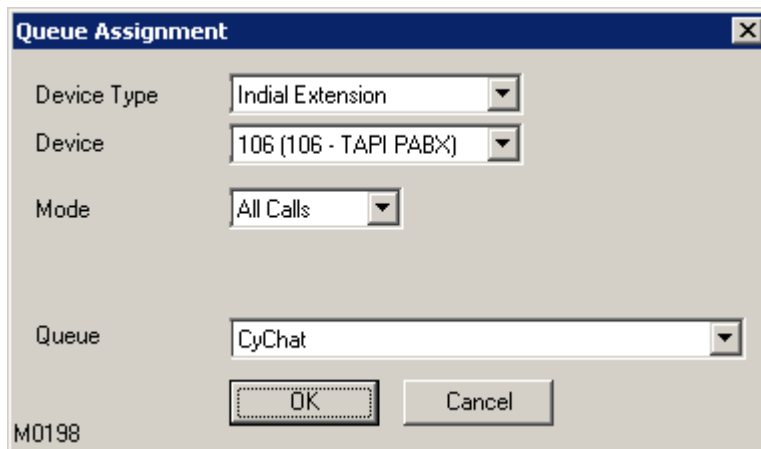
The 'Advanced' button brings up a screen to configure specific timeouts for different types of calls, to handle the situation that may arise where the PBX integration does not correctly report the status of a call. These settings should only be modified by a trained technician, as incorrect settings can be detrimental to the correct operation of the system.



6.3.10 Queue Assignments

The Assignments tab is used to assign devices to different queues for the CCS Q system. A new assignment can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.





Device Type – The type of the device.

Device – The actual device

Mode – The mode used by CCS Q to determine the identifying field for the incoming call.

- **DNIS** – Identifies the incoming number that was dialled.
- **CLI** – Uses caller ID of the incoming call
- **Caller Queue Lookup** – Uses a Queue lookup profile, as configure in the Q-Lookup tab.
- **All Calls** – Route all calls on this device to the queue
- **Redirecting ID** – In some TAPI implementations, the indial which has been called is reported in the 'Redirecting ID' field of the call information.

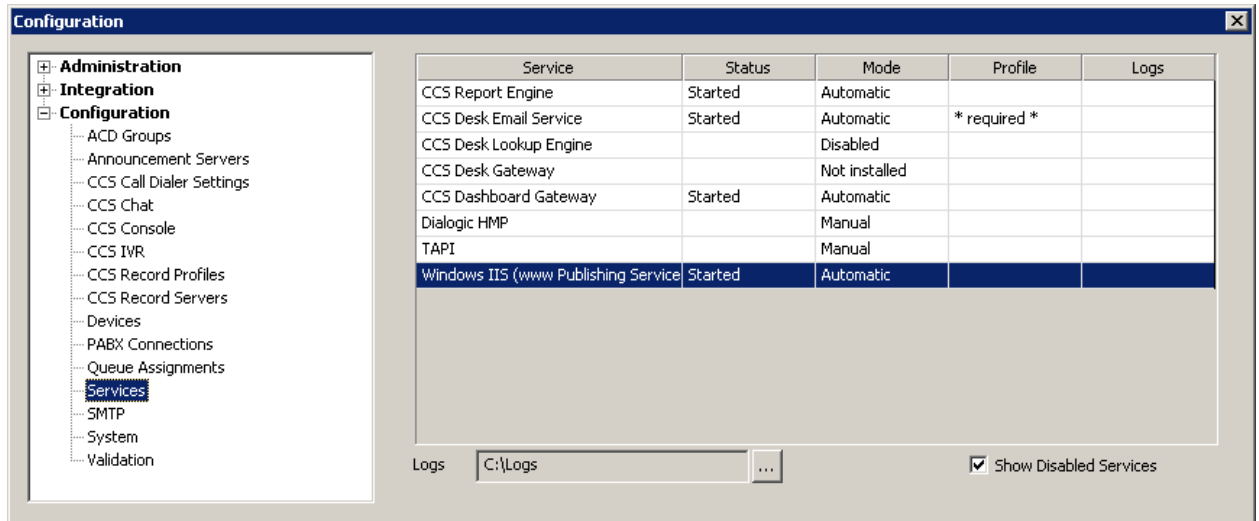
Identifier – The identifier to match for the queue as determined by the mode

Queue – The queue to put all calls on this device into. (Queue type: Any)

6.3.11 Services

This tab shows the installed CCS Services, their current status, start-up configuration, profile to be used for the server and location of logs. Services can be started/ stopped by using the right-click

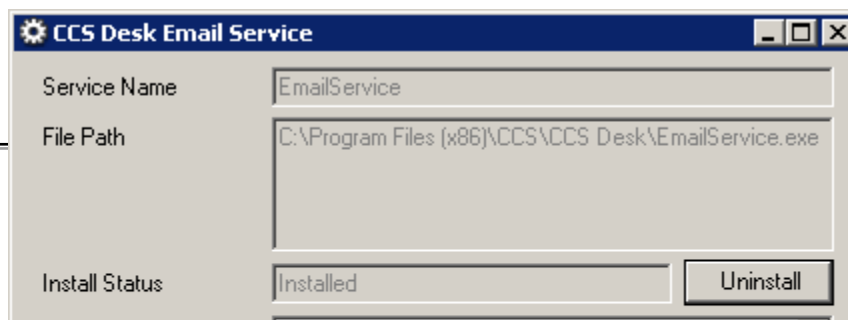
menu on each service. Also some related services with CCS Desk are also visible in this tab, such as Dialogic HMP, TAPI and Windows IIS.



Show Disabled Services – Disabled and Not Installed services could be shown by enabling this setting

Logs – Location of log files could be set using the ellipses button.

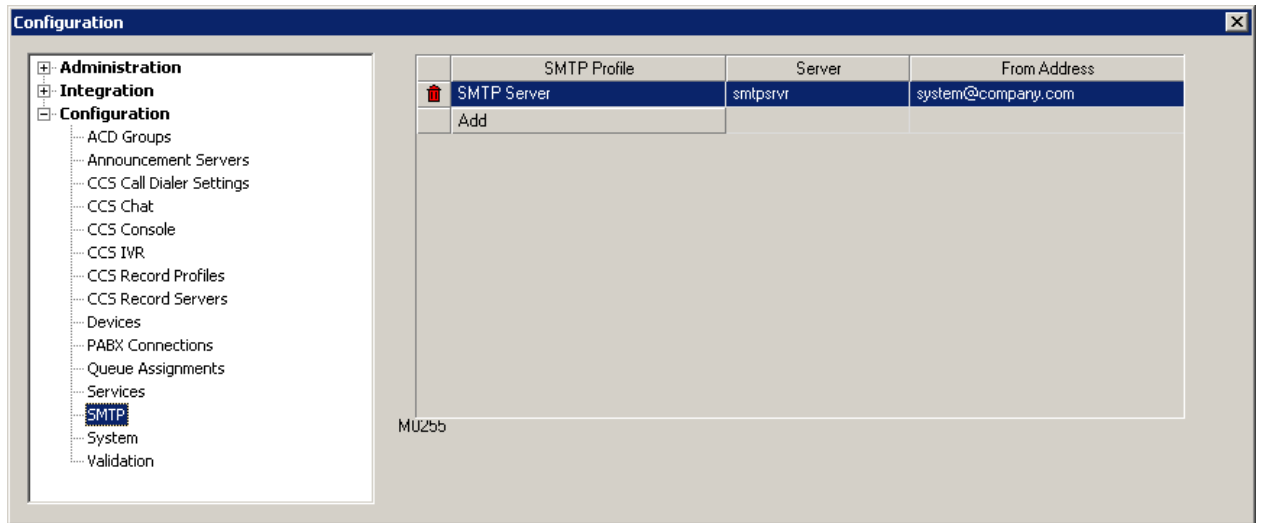
Enable the 'Configuration Mode' to install / uninstall the services. Right clicking on a service name in this list gives the option to configure the service. The configuration screen allows more aspects of the service to be controlled.



Services can be installed and uninstalled with the **Install / Uninstall** button. The Startup Mode can be configured to **Manual**, **Automatic**, or **Disabled**. The service can be stopped and started from this interface as well.

6.3.1 SMTP

SMTP profiles are used to send email notifications in different areas of the system. A new profile can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



SMTP Settings Editor

Profile Name: SMTP Server

SMTP Server: smtpsrvr

From Address: system@company.com

SMTP Username:

SMTP Password:

If a SMTP username and password are entered, it is assumed that SMTP authentication is required for sending messages (EHLO mode).
If no username is entered, it is assumed that no authentication is required (HELO mode)

OK Cancel

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Profile Name – The name of the SMTP profile

SMTP Server – The network address of the SMTP email server to use. Default SMTP port 25 will be used to connect. A different port number can be configured in this field by using the colon sign. e.g. **smtpsrvr:26**

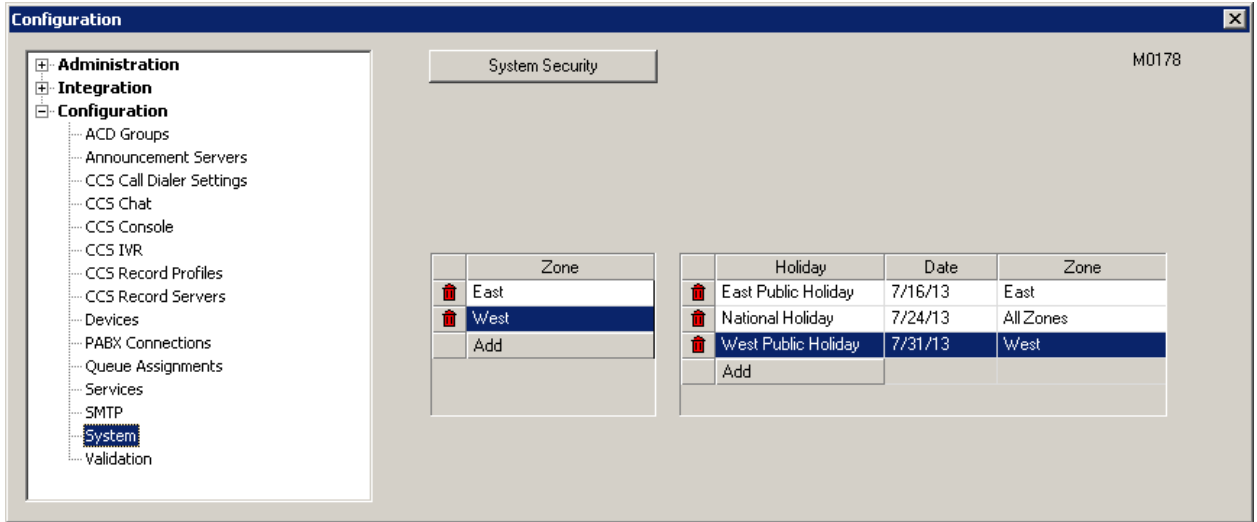
From Address – The sender address.

SMTP Username – Username to log in to the email server, if required.

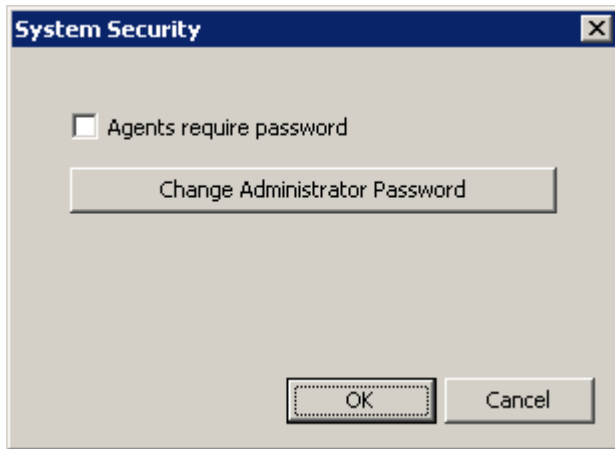
SMTP Password – Password to log in to the email server, if required.

6.3.2 System

The System tab contains configurations for Security, Zone and Holiday as well.

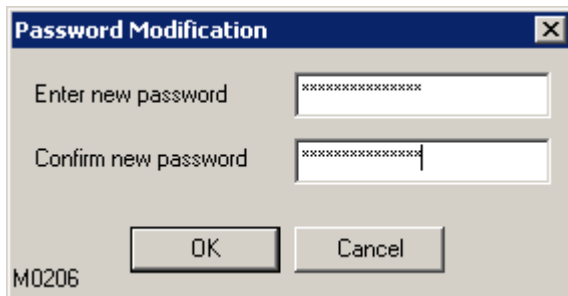


6.3.2.1 System Security

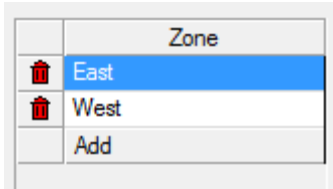


Agents Require Password – When enabled, agents are required to enter their password when logging in to CCS Desk.

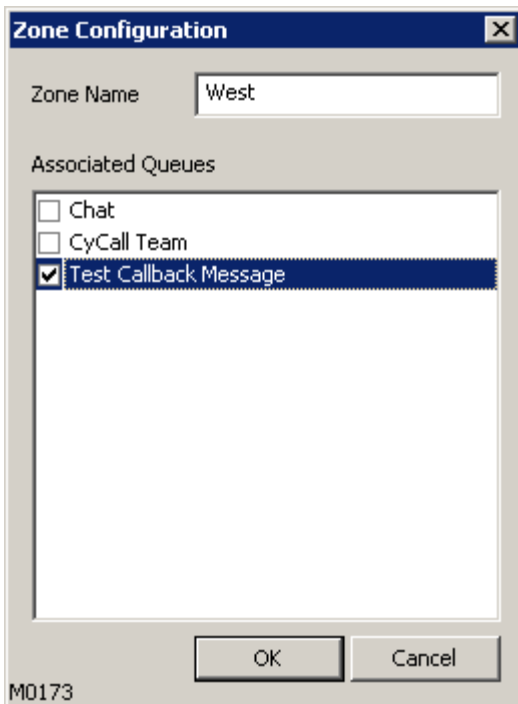
Change Administrator Password – Modify the password for the built-in Administrator account.



Queue behaviour can be automatically adjusted according to Holidays for the Zone in which a queue is based. Zones are primarily for centralized organizations that answer calls from multiple locations, and have to apply the local working days according to the origin of the call. In such case, public Holidays can occur in each of those locations that do not occur at the same time in the other locations.






A new zone can be added by clicking on the 'Add' button in the Zones list, and an existing one can be deleted by clicking on the 'red bin' icon.



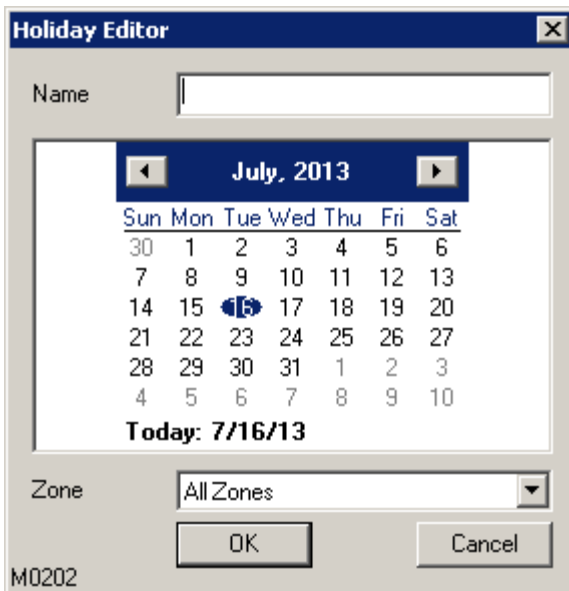
When adding a new zone, or at any time after it is created, you can specify which queues belong to the zone. It is not possible to assign multiple zones to a queue.

6.3.2.3 Holiday

	Holiday	Date	Zone
	East Public Holiday	5/04/2012	East
	National Holiday	14/04/2012	All Zones
	West Public Holiday	16/04/2012	All Zones
	Add		

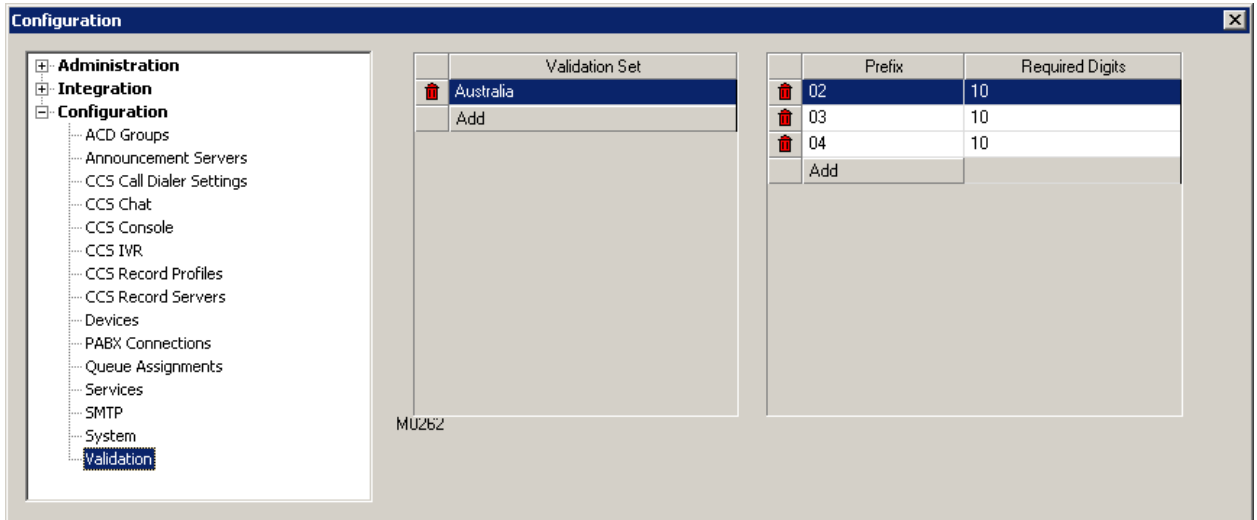
A new Holiday can be added by clicking on the 'Add' button in the Holiday list, and an existing one can be deleted by clicking on the 'red bin' icon.

When a Holiday is added to the system, you specify whether it applies to a specific zone or all zones

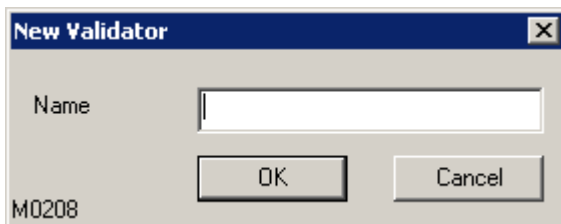


6.3.3 Validation

The Validation tab enables the definition of sets of predefined conditions, used to remove invalid or incomplete numbers from a dataset prior to the calls being made through the CCS Call outbound telemarketing campaign module. The example below demonstrates the different possible prefixes, and numbers of digits we can expect to find in valid numbers to be called within Australia.

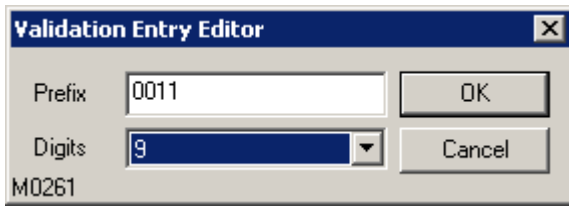


A new Validation Set can be added by clicking on the 'Add' button, and an existing one can be deleted by clicking on the 'red bin' icon.



Name – the name of the validation set.

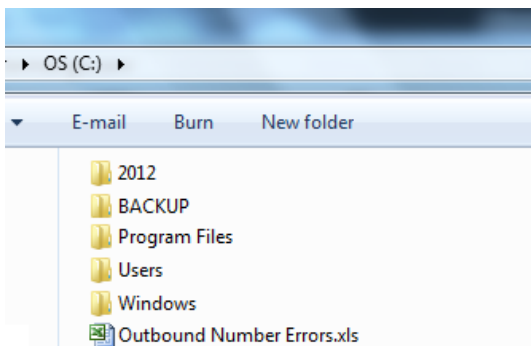
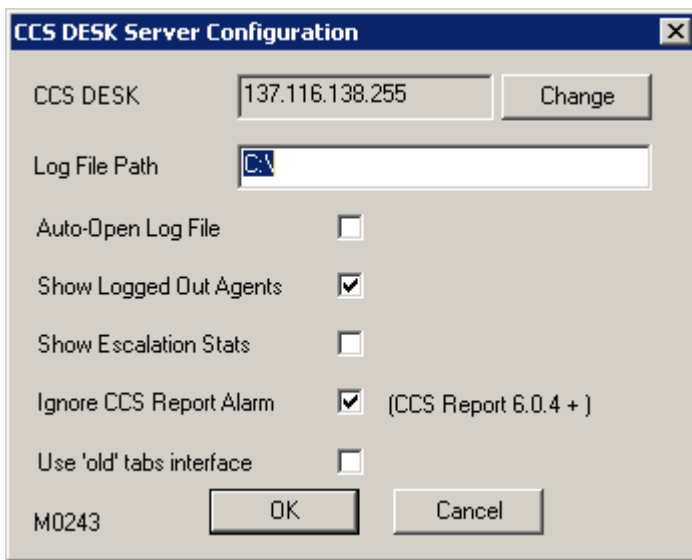
To add a new condition into a validation set, firstly click on the validation set then click Add button on the section on the right. Click on the 'red bin' icon to delete an existing condition.



Prefix – the expected digits at the beginning of the phone number

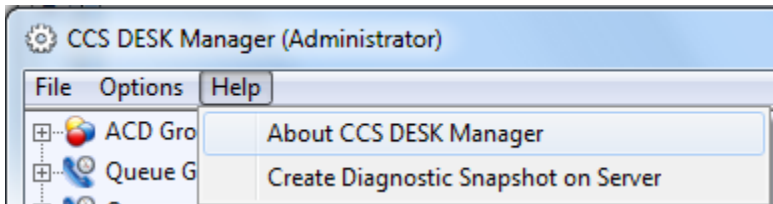
Digits – the expected number digits in the corresponding phone number

When importing a list of calls for a campaign, each number will be checked against each entry in the validation set. Any number that does not pass will be logged by CCS Desk Manager into an Excel (xls) file with the same name as the campaign, stored in the Log File Path specified in the CCS Desk Manager Options. If the Auto-Open Log File option is selected, the excel file will be opened automatically after the loading process has finished,



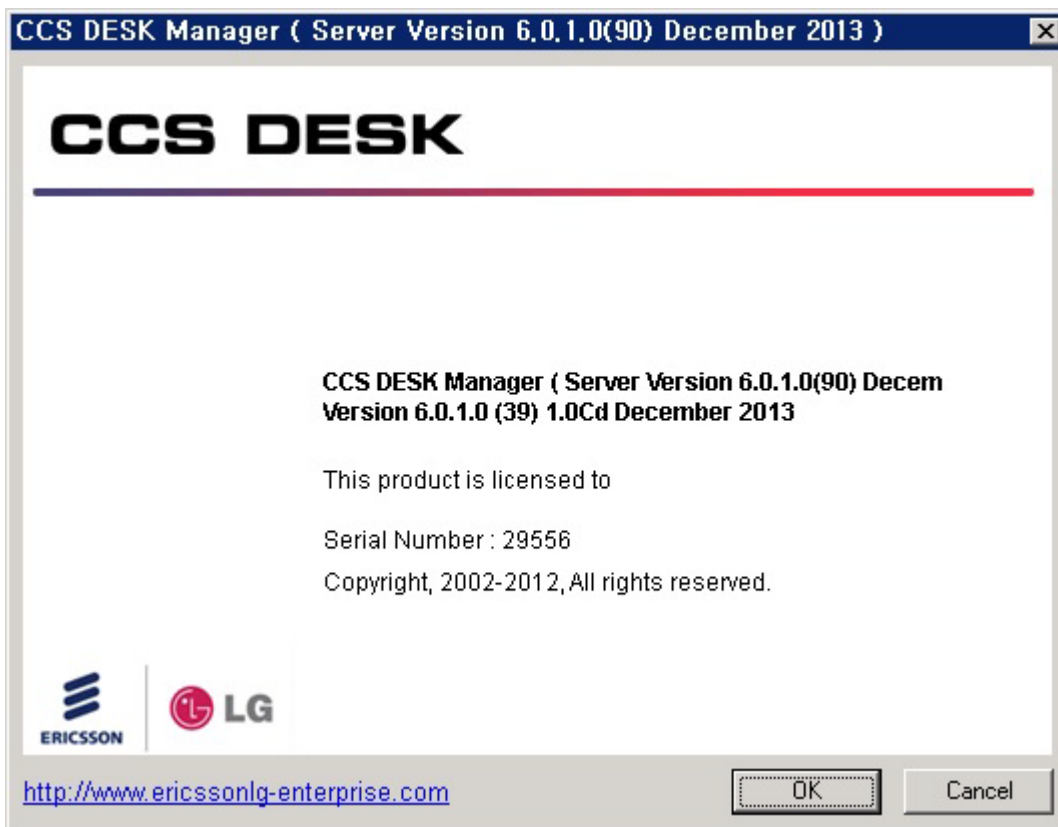
	A	B	C	D
1	Number	Name	Company	UniqueID
2	130011111	John Smit	ABC	3

6.3.4 Diagnostics

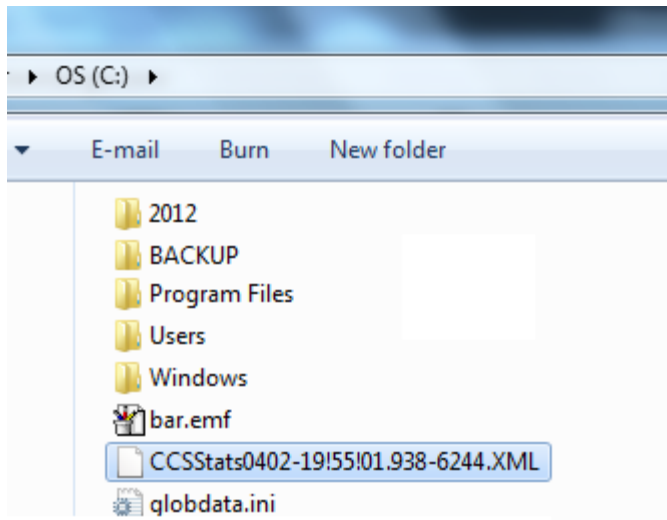


In the 'Help', there is a number of information that helps during a troubleshooting session.

About CCS Desk Manager – Displays the CCS Desk banner where you can see the software version. This must always match the CCS Desk Manager version when opened on the server.

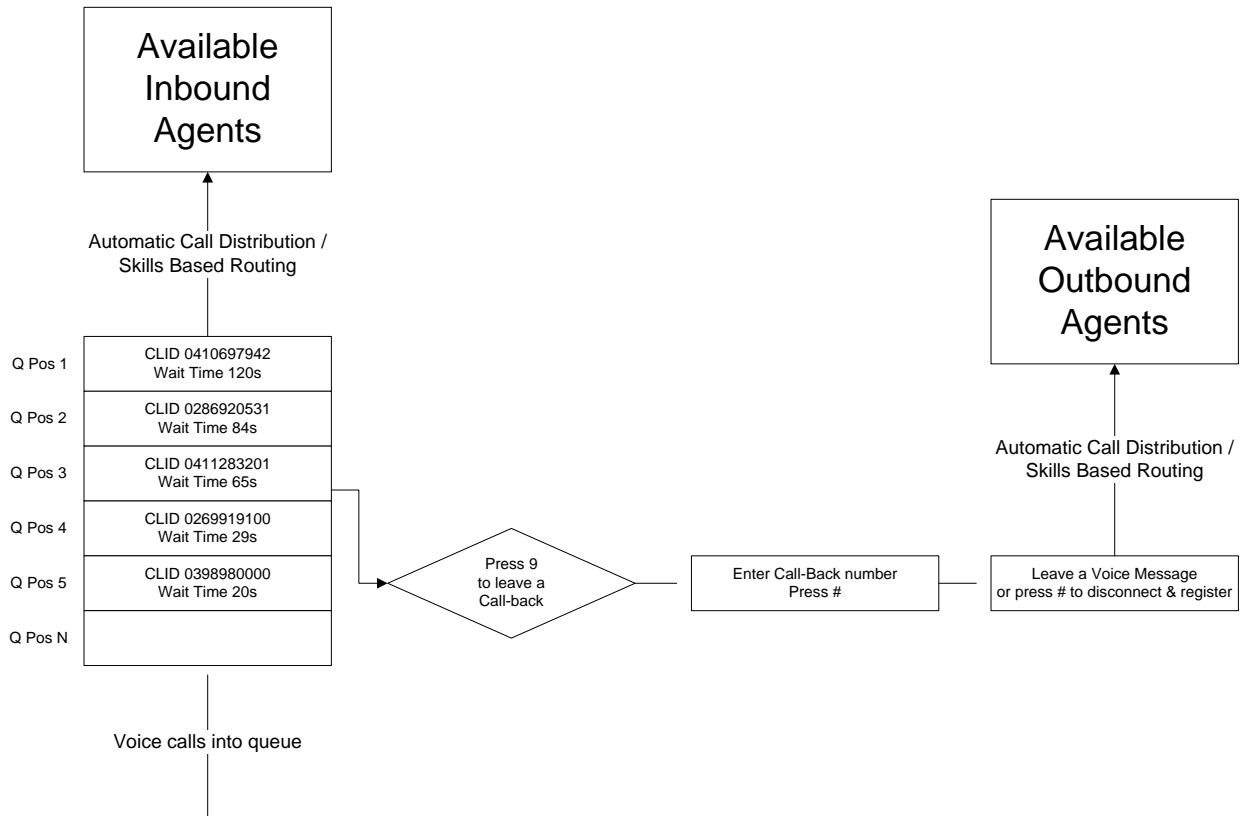


Create Diagnostic Snapshot on Server – Instructs CCS Desk Server to create a diagnostic XML file of all the system configurations and information. The XML file is named CCSSstats plus creation timestamp and stored in the 'Log File Path' folder.



7. Configuring CCS Q for Callback-in-Queue

7.1 Overview



Callers in the Queue no longer need to wait - callers can be presented with an option to leave their details and a voice message and maintain their position in the queue. CCS Q will present a call-back action to designated agents with the caller details and also the voice message left, by any administrator set priority or schedule. Agents can categorise the tasks completed by administrator assigned lists so that results and totals can be provided in real-time statistics to the wallboard and for review in historical reporting. The CCS Q Real-Time screens log and present traffic and statistical details for Callback-in-Queue tasks and performance just the same as live calls in the system features.

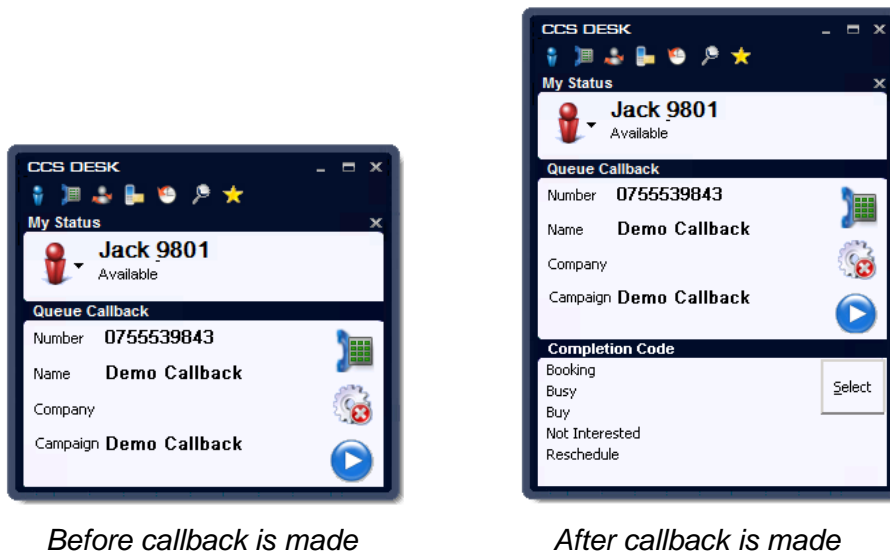
While waiting in queue, callers will be given an option to press and leave a callback request. The first step to complete a call-back request is to enter their return phone number followed by the # key. Caller will now be asked to leave their voice message which will be delivered and listened by the agents when the call-back reaches them.

There are two alternative steps to complete a call-back request supported by the system:

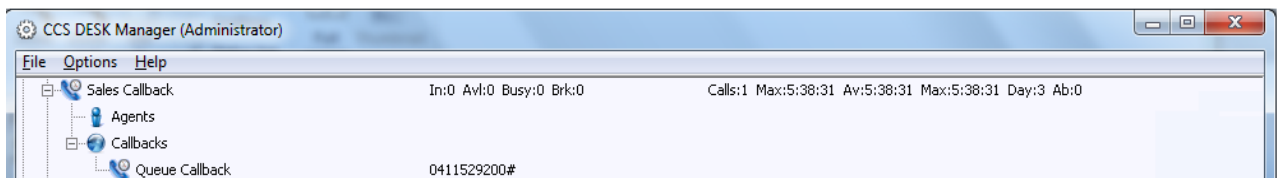
- No return phone number and no voicemail → CLID will be used as the return phone number.
- Return phone number only.

For more advanced call-back in queue mechanism, which may include CLID identification and speech recognition, CCS IVR can be used.

Agent screen



Supervisor screen

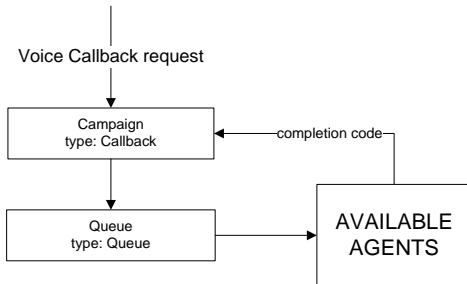


Additional System Requirements

- Agents' PCs must have multimedia sound capability for playback of recordings
- Agents' security profiles must have READ access to the callback recording shared folder.
- CLID must be enabled on the trunk lines

7.2 Callback Campaign

Callback utilizes the campaign and queuing engine as illustrated below



The 'Callback' campaign must be configured completion code and linked to queue (**Queue type: Queue**). The campaign must also be started and stays running all the time.

Configure Campaign : Membership Calls

General | Completions | Integration

Name: Sales Callback 14

Queue: Team 1

Agent Mode: Preview

Maximum Retries: 3

Seconds before dialing: 0

Seconds between calls: 0

Call Priority: 1 (1 is the lowest priority)

Has Expiry Date: 7/23/13 You must be logged in as a named user with a password to use this

Multi Dial Mode:

M0138

OK Cancel

Configure Campaign : Membership Calls

General | Completions | Integration

Completion Type	Retries	Delay
Busy	5	5 Minutes
Callback		
Contacted		
No Answer	5	5 Minutes
Wrong Number		
Add		

Default Code [] After [0] Seconds

Disable 'Complete without calling'

M0139

OK Cancel

Configuration

Administration

- Agents
- Breaks
- Campaigns
- Completion Codes
- Email Queuing
- Hot Keys
- Partitions
- Queue Announcements
- Queue Caller Lookup
- Queue Groups
- Queues
- Skills
- Speed Dials
- Web Callbacks

Integration

Configuration

Campaign Type: Callback

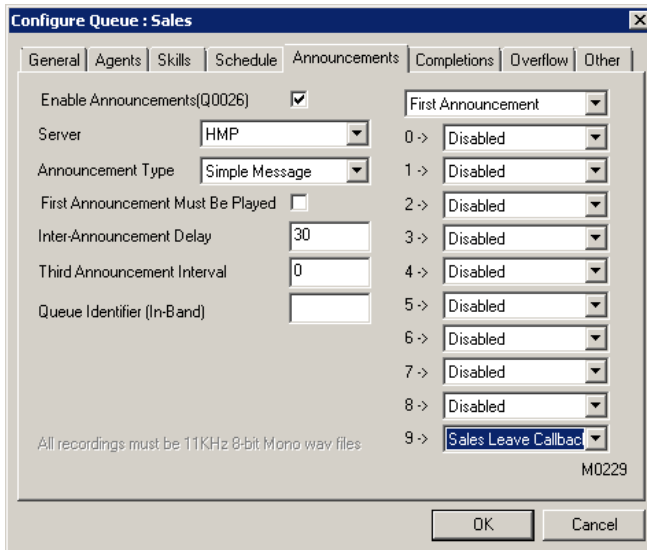
Name	Status	New	Queued	Ready	Autodial	Active	Pending	Complete
Sales Callback	Ready to S	0	0	0	0	0	0	0
Add								

Load Stop Restart View Clear

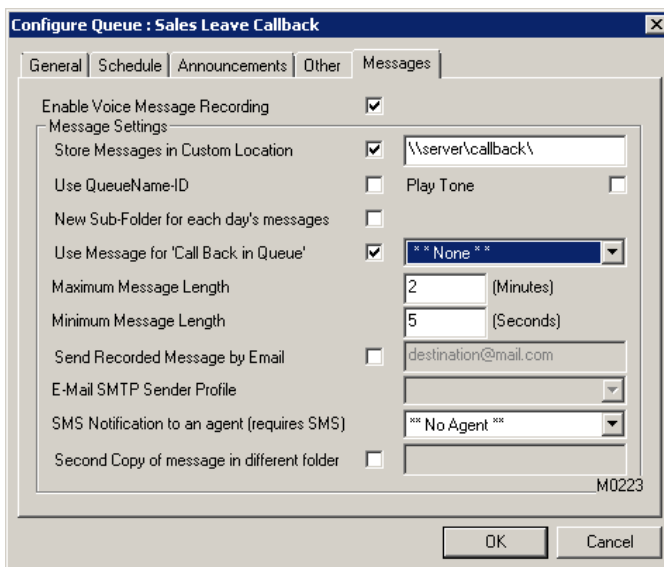
M0137

7.3 Leave number and voice message

A separate queue (**Queue type: Callback Message**) must be used if we want to record the return phone number and voice message from the caller. The 'Queue' queue should provide an option to route into the 'Callback Message' queue or overflow when a condition is met. For example, option 9 during the announcements.



At the 'Callback Message' queue, configure the announcement with simple message and configure the voice message recording at **Messages** tab as per screenshot below.



The custom location must be a UNC path to a shared network folder. The sharing access must allow agents to read & execute any files within that folder.

A campaign (**Campaign type: Callback**) is selected for the “Call Back in Queue”.

The greeting files for the ‘Callback Message’ queue must also advise the caller as described below:

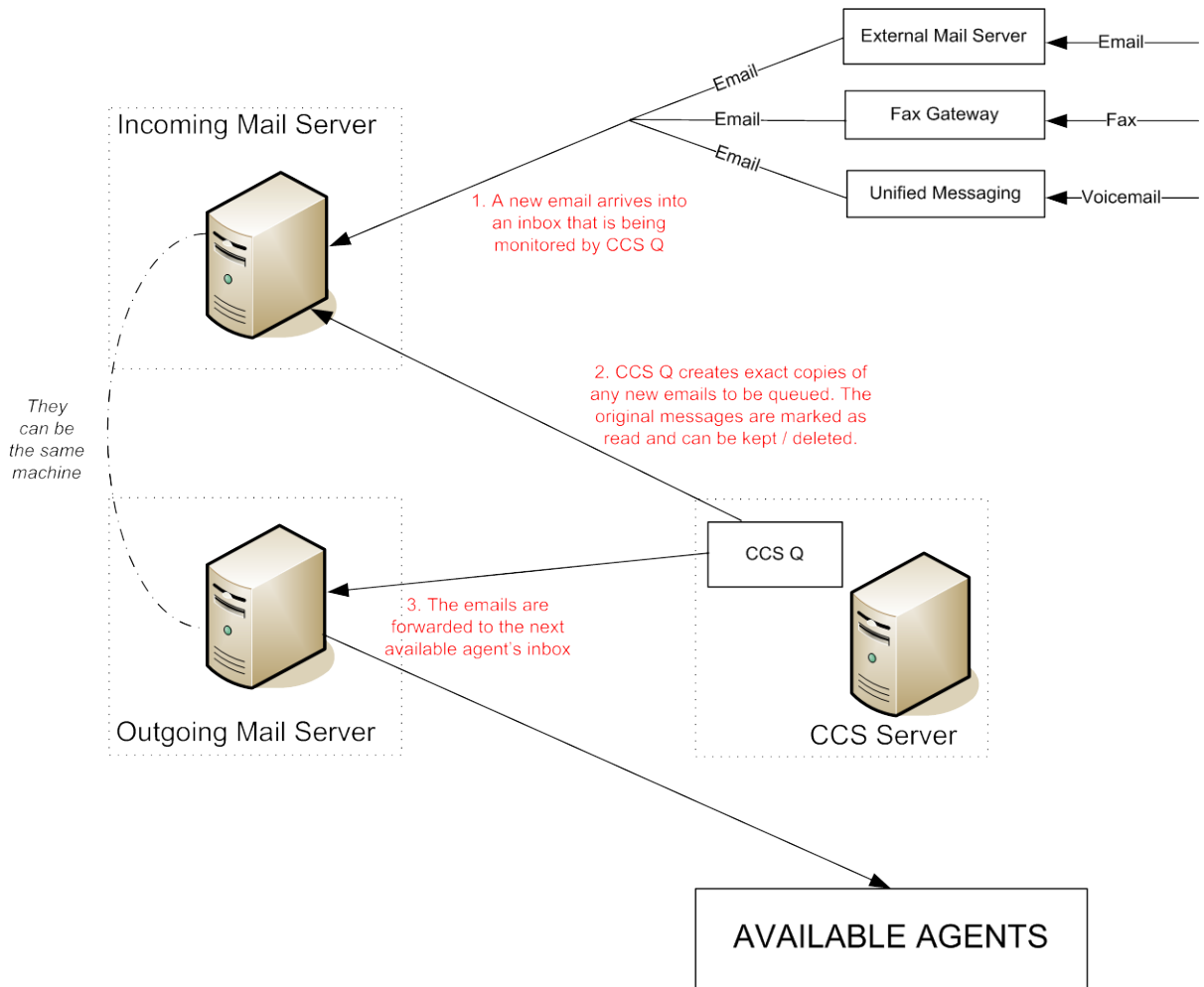
Greeting1 → type the return phone number after the tone, and end with #

Greeting2 → leave a message after the tone, and end with # or Hangup when finished.

If caller hangs up at greeting1, there will be no recorded message but a callback will still be created. Similar to the abandoned call scenario, but the callback will be presented with the new phone number keyed by the caller.

8. Configuring CCS Q for Email Queuing

8.1 Overview

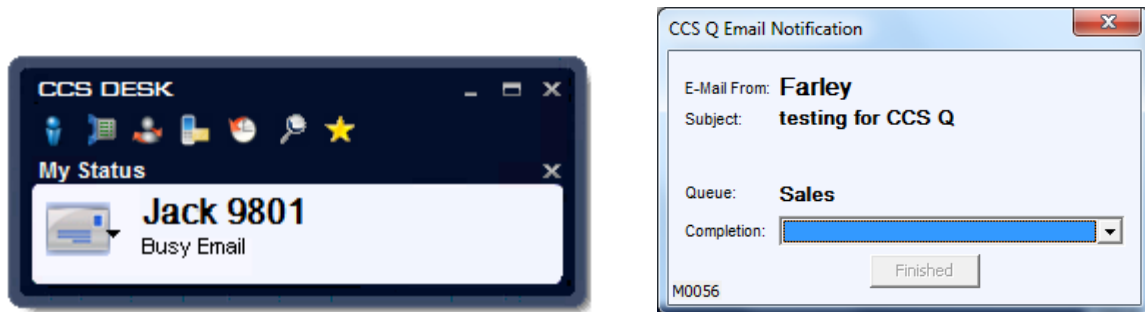


CCS Q can integrate with email servers thus emails can also be routed by CCS Q. The emails are treated like a caller in a queue and will be routed to the next available agent. Options can be set so that Agents with an email task can be set to busy so they don't take calls or be available at all times for both. Agents can categorize the tasks completed by administrator assigned lists so that results and totals can be provided in real-time statistics to the wallboard and for review in historical reporting. The CCS Q Real-Time screens and

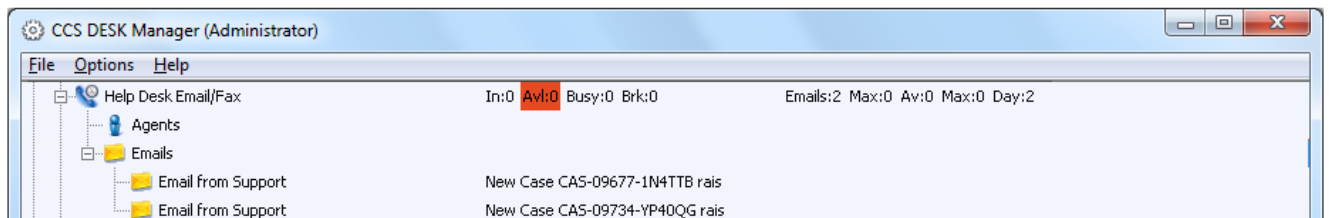
also historical reports log and present traffic and statistical details for Email queues tasks and performance just the same as live calls in the system features.

The Email Queuing feature also enables voicemail and faxes to be queued provided customer the necessary gateway applications that convert them into email notifications.

Agent Screen



Supervisor Screen



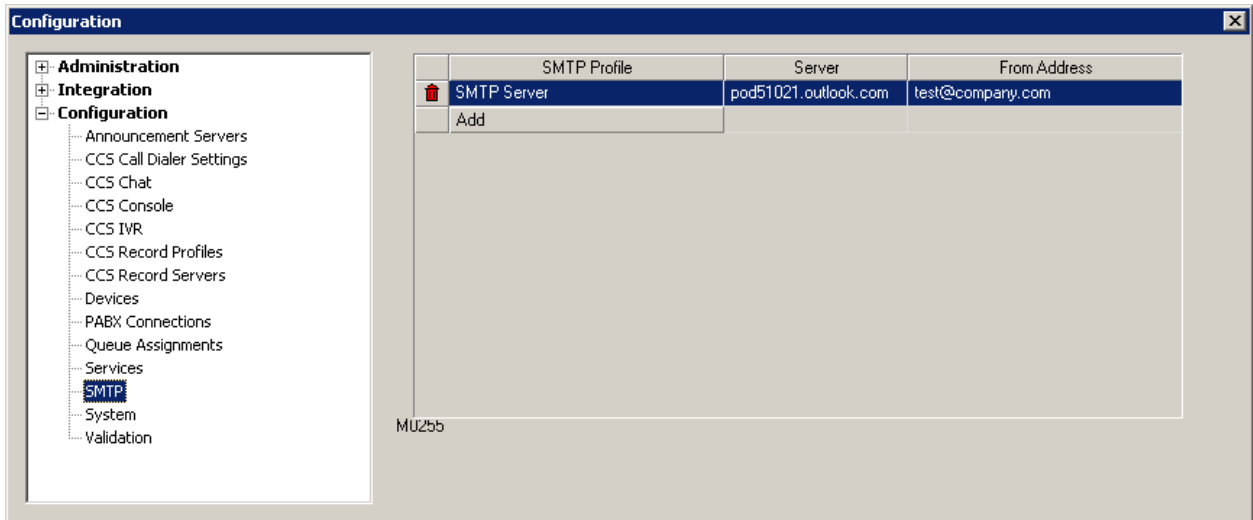
Additional System Requirements:

- Mail server that supports IMAP protocol for inbound email queuing, and SMTP protocol for outbound email delivery. CCS Q can also communicate with Microsoft Exchange Web Services or Microsoft Exchange On-Line Web Services.
- For Voicemail queuing, additional Unified Messaging System (UMS) such as Callware Callegra.UC is required to produce email notifications when a voicemail is received.

For Fax queuing, additional Fax Gateway such as Callware CallegraFax is required to convert fax into email.

8.2 Configure SMTP

The **SMTP** tab in CCS Desk Manager must be configured with one SMTP profile. Please consult the *Administration and User Manual for CCS Desk* section 2.10.33 for more information on the configuration in this tab.



8.3 Configure Agent

Each agent that handles email must be configured with their email address. **Please consult the *Administration and User Manual for CCS Desk* section 210.1 for more information on the configuration in this tab.**

Edit Person

Name: Jack
Mobile:
Integration: None
Home:
Profile:
Other1:
Auto Break: -- Disabled --
Other2:
User Level: Standard User
CCS Record Profile: -- Disabled --
IM Type: None
IM Signin:
Calendar Profile: -- Disabled --
HotKey Profile: -- Disabled --
E-Mail: jack@company.com

Enable 'Copy to dial'
Confirm before dialing
Leave number in clipboard
Disable Dialing from CCS DESK
Allow SMS Sending
Show Queued Calls

Skillsset	Skill	Level
Add		

Assigned to Queues

Add

Individual Wrap-up Time: 0
Maximum Chats: 0
Allow login/out of specific queues
Allow send/receive notes for anyone
Only see 'my team'

M0207

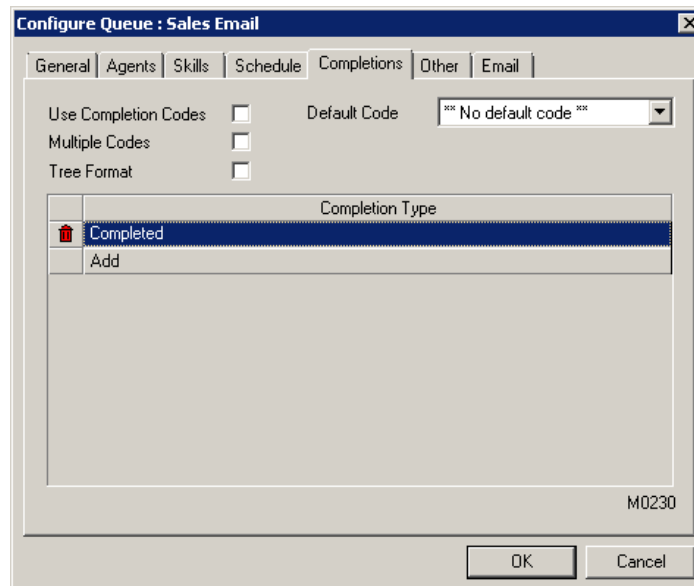
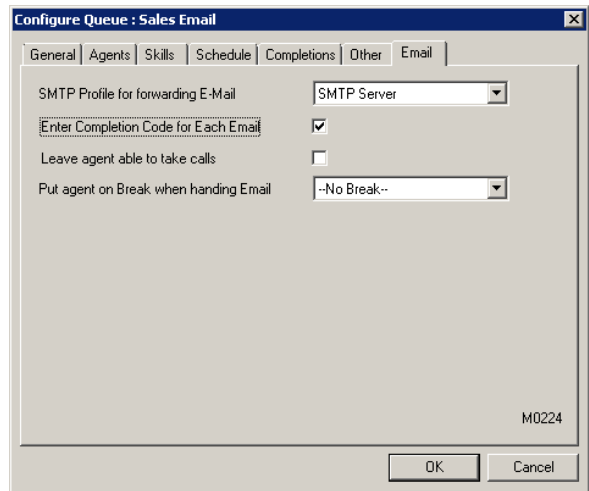
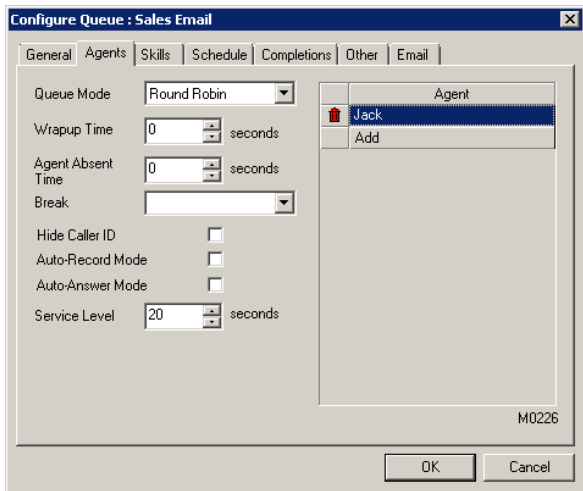
8.4 Configure Queue

Create / edit the queue that will be used to route the emails. (**Queue type: Email**)

Assign the agents on the **Agents** tab.

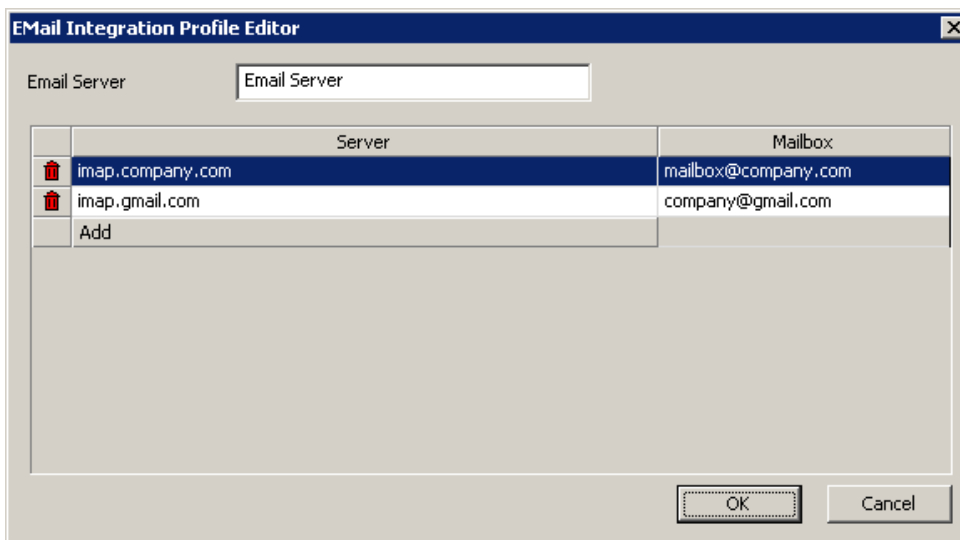
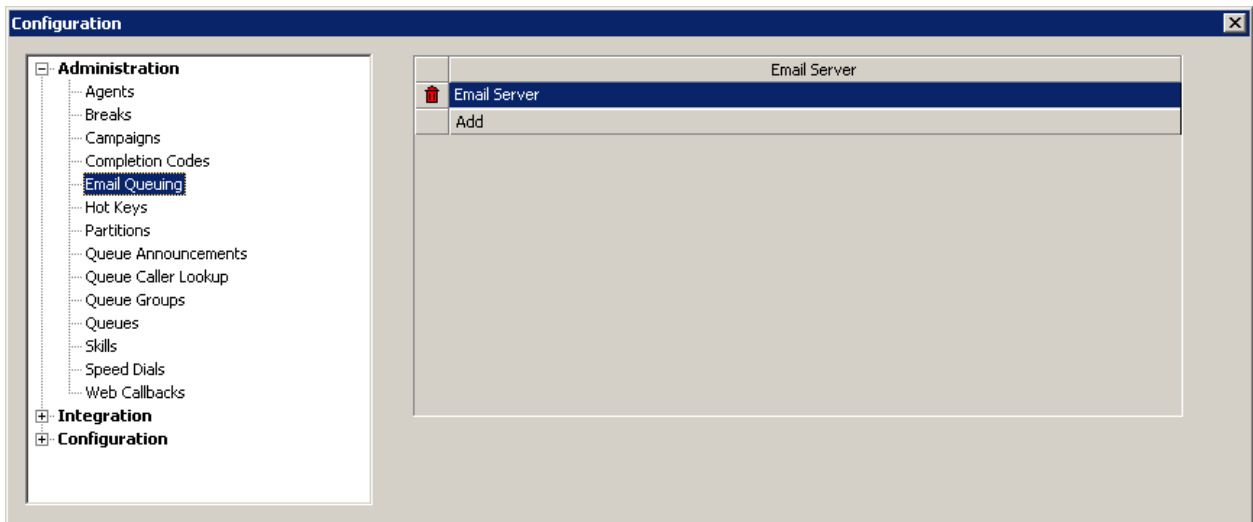
Select the SMTP profile on the **Email** tab and set other options accordingly.

If 'Enter Completion Code for Each Email' is enabled, you also need to add the **Completions**.



8.5 Configure Email Server Integration Profile

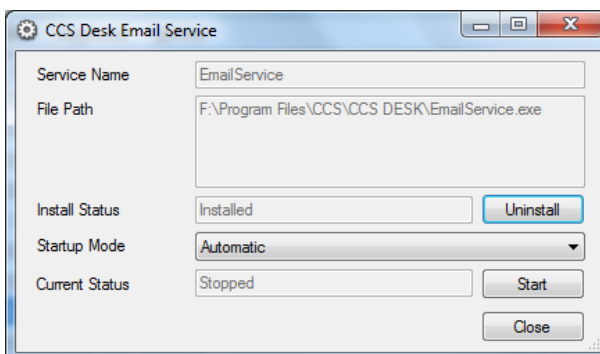
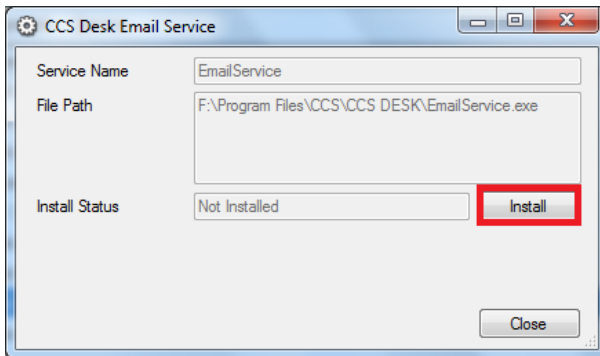
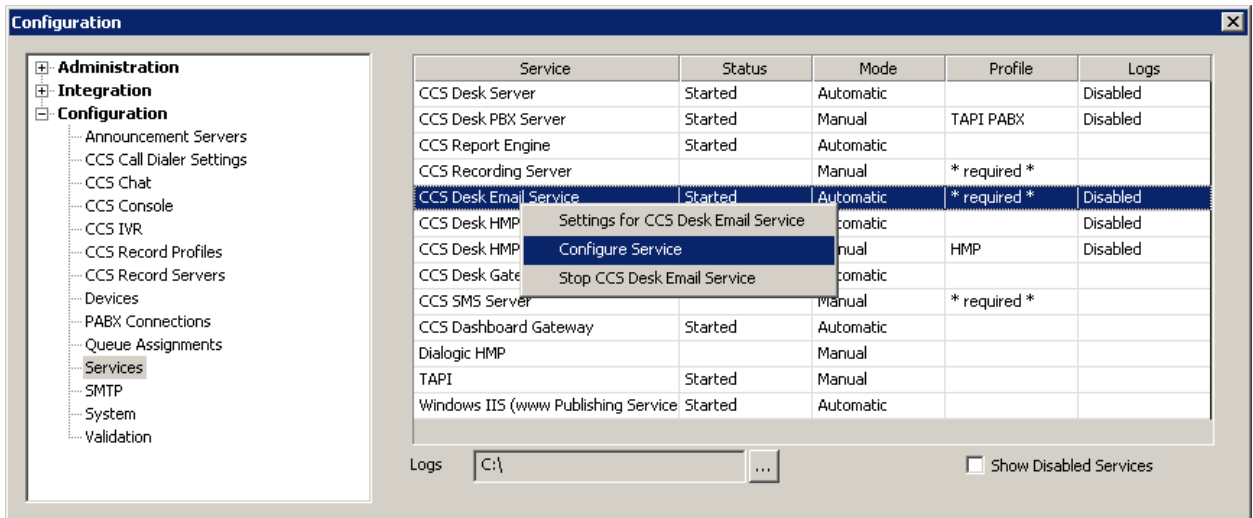
Go to the **Email Queuing** tab in CCS Desk Manager and configure all email accounts that will be distributed with CCS Q. One email integration profile is able to multiple connections to different email servers, with different connection methods, and accessing different accounts. **Please consult the *Administration and User Manual for CCS Desk* section 2.9.34 for more information on the configuration in this tab.**



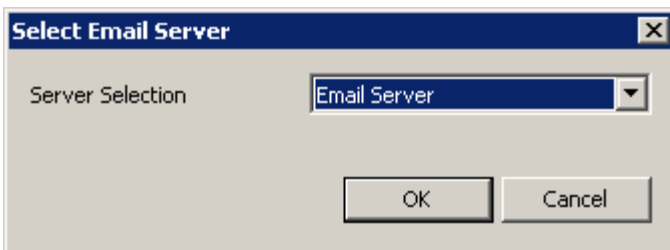
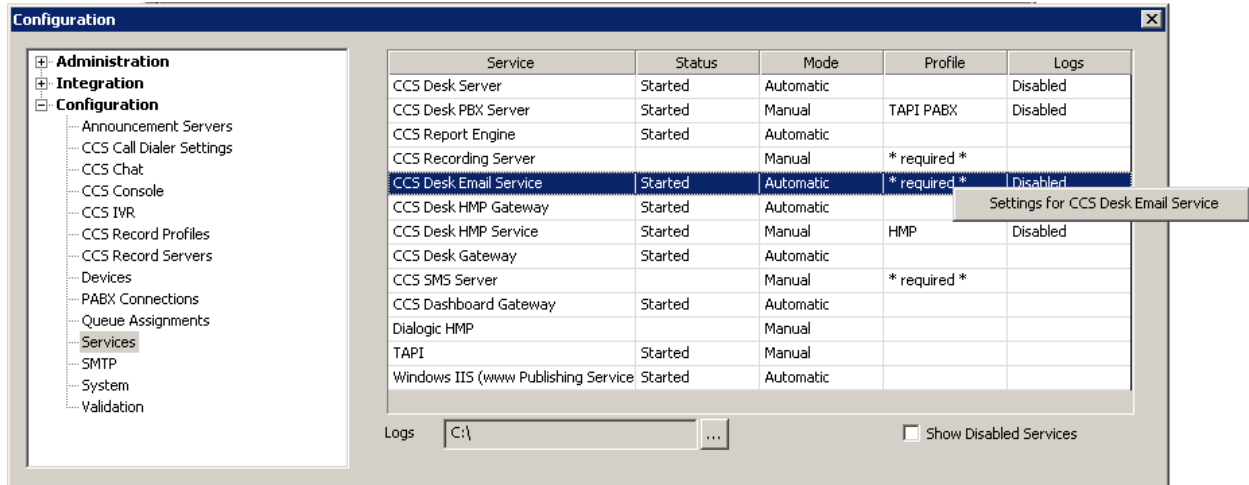
8.6 Configure CCS Desk Email Service

The email service is included when CCS Desk is installed however it is not enabled by default.

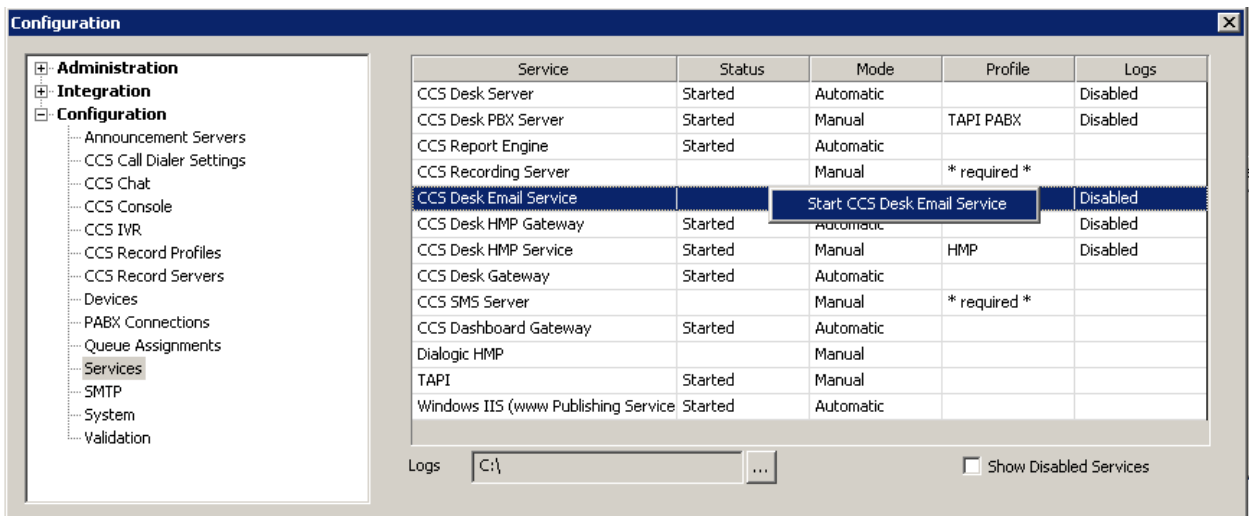
Go to the **Services** tab of **CCS Desk Manager** and enable the **Configuration mode** to install the **CCS Desk Email Service** service. Do not start the service.



Right click on the Profile of CCS Desk Email Service the click on **Settings for CCS Desk Email Service**. Select the email server profile that has been created then click **OK**.

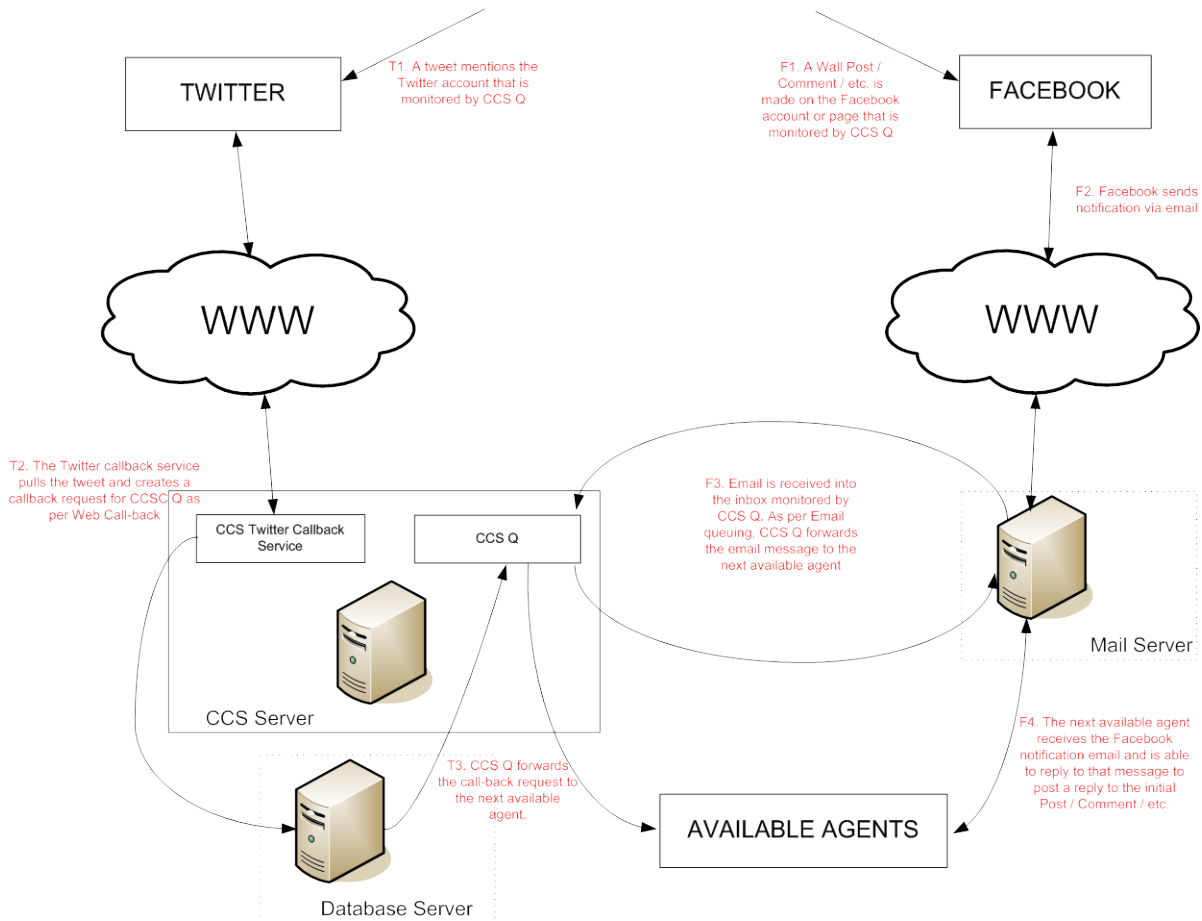


Right click on the CCS Desk Email Service then select **Start CCS Desk Email Service**.



9. Configuring CCS Q for Social Media

9.1 Overview



Twitter and Facebook are increasingly becoming part of the commercial landscape and businesses need ways to manage staff and meet their services quality. Utilising the power of CCS Q, we can now integrate these popular Social Medias, providing more reach and power within the contact centre.

The Twitter Callback has similar concept as the CCS Q Web Callback. A Twitter account will be monitored by a service and the service will create callback request based on tweets that mentions the account. Currently supported tags are **call!** or **callme!** or **!callme** followed by the telephone number.

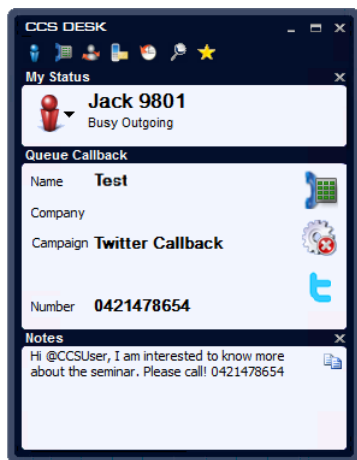
Examples of tweet that will successfully create callback request:

@ccs please call!0421478654 or **Need help from @ccs. Please !callme 0421478654**

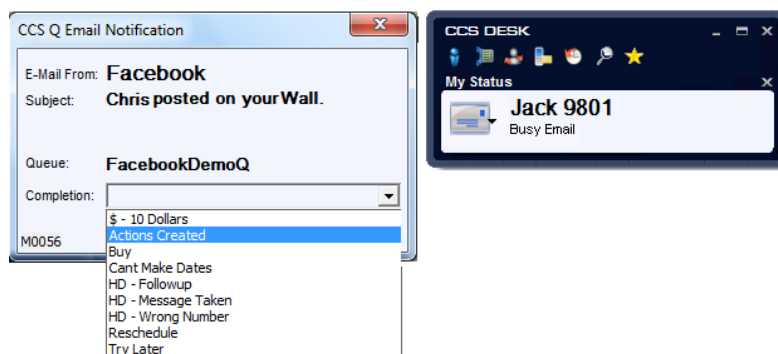
A configurable auto reply via direct message will automatically be sent if the correct tag is found but not followed by a phone number.

Facebook integration works by using the CCS Q Email Queuing. Facebook can be configured to email notifications on all / certain activities. CCS Q will distribute the email notifications, and Facebook responses can be done by simply replying the email. Not that the agent's email account must be allowed to send the email as / on behalf of the Facebook email account.

Example Twitter Callback



Example Facebook Email



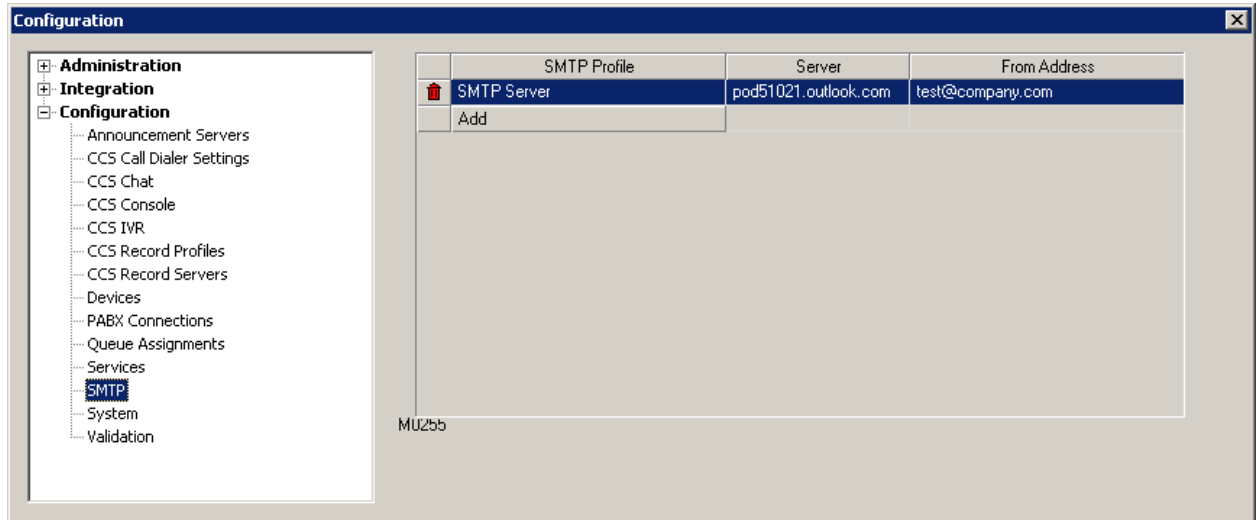
Additional System Requirements

- Valid Facebook and/or Twitter account.
- Mail server that supports IMAP protocol for inbound email queuing, and SMTP protocol for outbound email delivery. CCS Q also supports Microsoft Exchange 2007 / 2010 Web Services or Exchange On-Line Web Services.
- The agents' email settings must allow sending as the Facebook account holder.
- Internet connection on the server with full access to social media websites and microsites.

9.2 Facebook

9.2.1 Configure SMTP

The **SMTP** tab in CCS Desk Manager must be configured with one SMTP profile. Please consult the *Administration and User Manual for CCS Desk* section 2.10.33 for more information on the configuration in this tab.



9.2.2 Configure Agent

Each agent that handles email must be configured with their email address. **Please consult the Administration and User Manual for CCS Desk section 3.10.1 for more information on the configuration in this tab.**

The screenshot shows the 'Edit Person' configuration window for an agent named Jack. The window is divided into several sections for configuring user details, profiles, and permissions.

Personal Information:

- Name: Jack
- Mobile: [Empty]
- Home: [Empty]
- Other1: [Empty]
- Other2: [Empty]
- E-Mail: jack@company.com

Integration and Profiles:

- Integration: None
- Profile: [Empty]
- Auto Break: -- Disabled --
- User Level: Standard User
- CCS Record Profile: -- Disabled --
- Calendar Profile: -- Disabled --
- HotKey Profile: -- Disabled --

IM Settings:

- IM Type: None
- IM Signin: [Empty]

Call Handling Options:

- Enable 'Copy to dial':
- Confirm before dialling:
- Leave number in clipboard:
- Disable Dialing from CCS DESK:
- Allow SMS Sending:
- Show Queued Calls:

Skills and Queues:

Skillset	Skill	Level
Add		

Assigned to Queues	
Add	

Advanced Settings:

- Individual Wrap-up Time: 0
- Maximum Chats: 0
- Allow login/out of specific queues:
- Allow send/receive notes for anyone:
- Only see 'my team':

M0207 OK Cancel

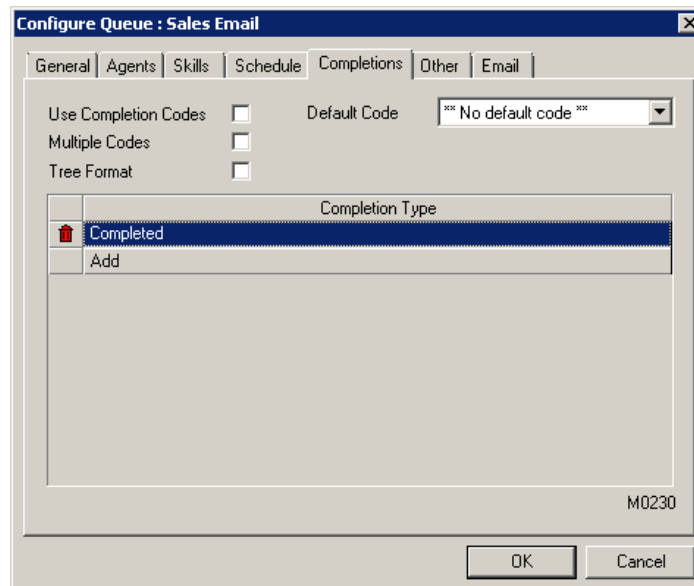
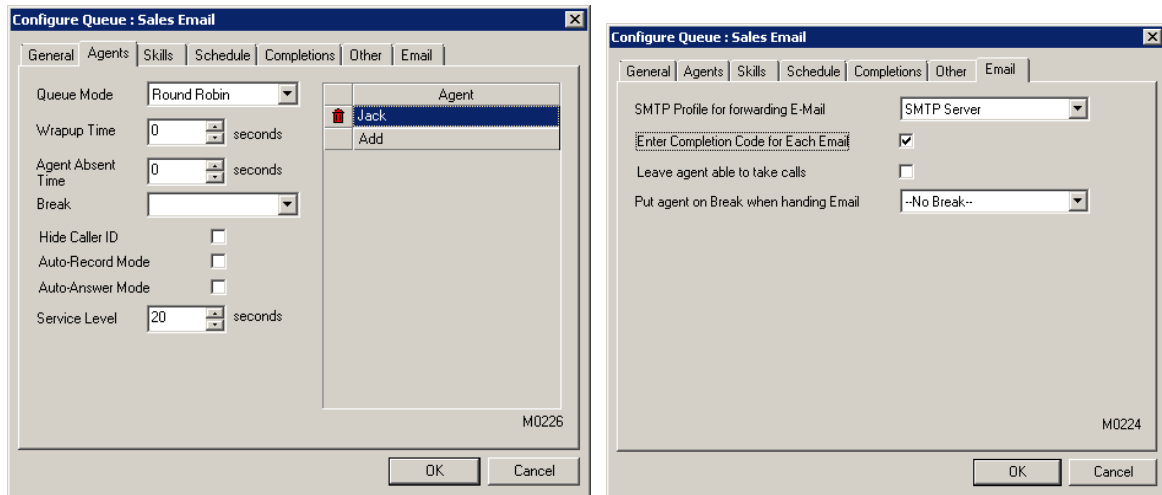
9.2.3 Configure Queue

Create / edit the queue that will be used to route the emails. (**Queue type: Email**)

Assign the agents on the **Agents** tab.

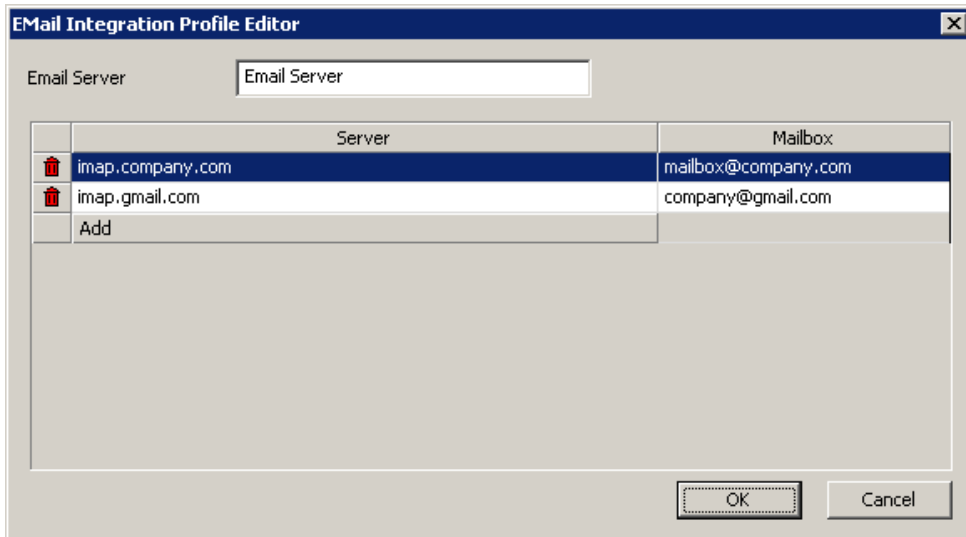
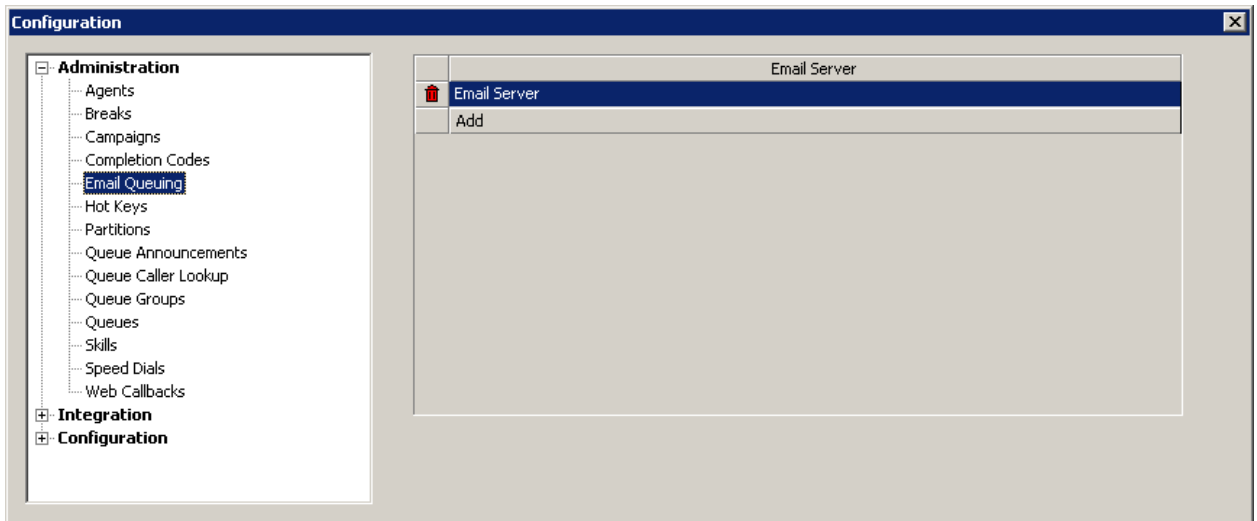
Select the SMTP profile on the **Email Queuing** tab and set other options accordingly.

If 'Enter Completion Code for Each Email' is enabled, you also need to add the **Completions**.



9.2.4 Configure Email Server Integration Profile

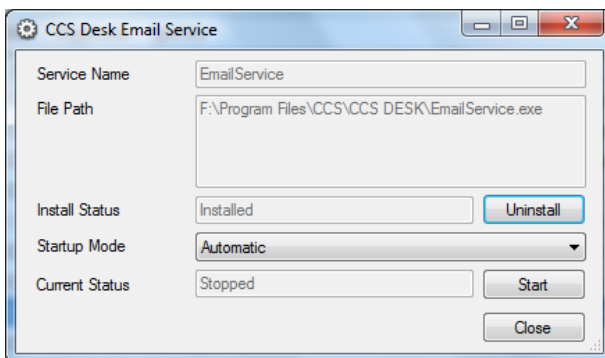
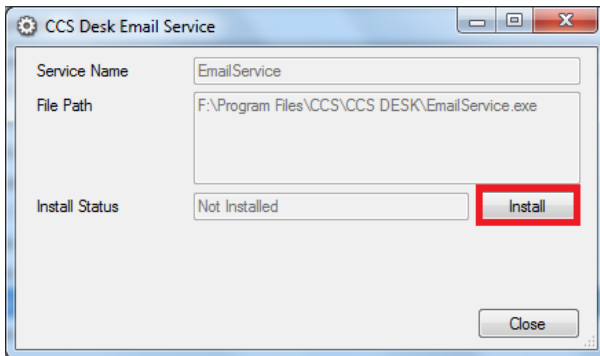
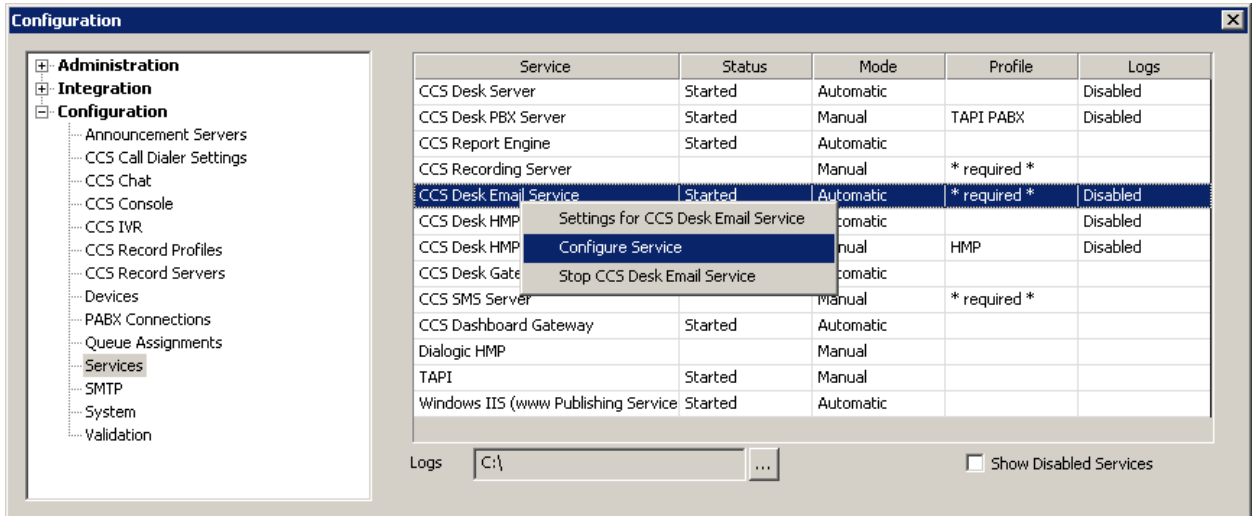
Go to the **Email Queuing** tab in CCS Desk Manager and configure all email accounts that will be distributed with CCS Q. One email integration profile is able to multiple connections to different email servers, with different connection methods, and accessing different accounts. **Please consult the Administration and User Manual for CCS Desk section 2.9.34 for more information on the configuration in this tab.**



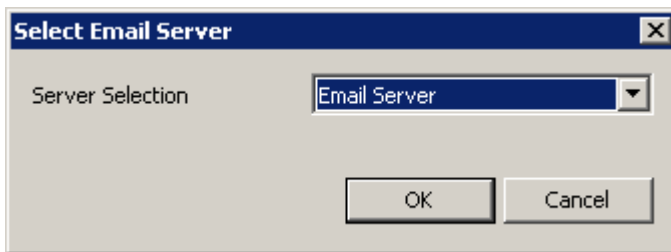
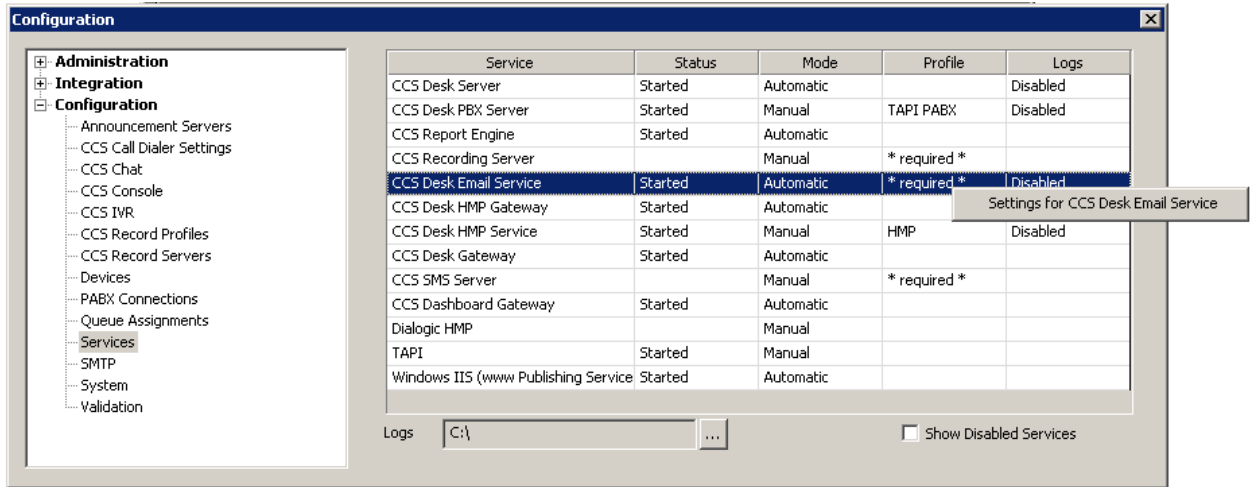
9.2.5 Configure CCS Desk Email Service

The email service is included when CCS Desk is installed however it is not enabled by default.

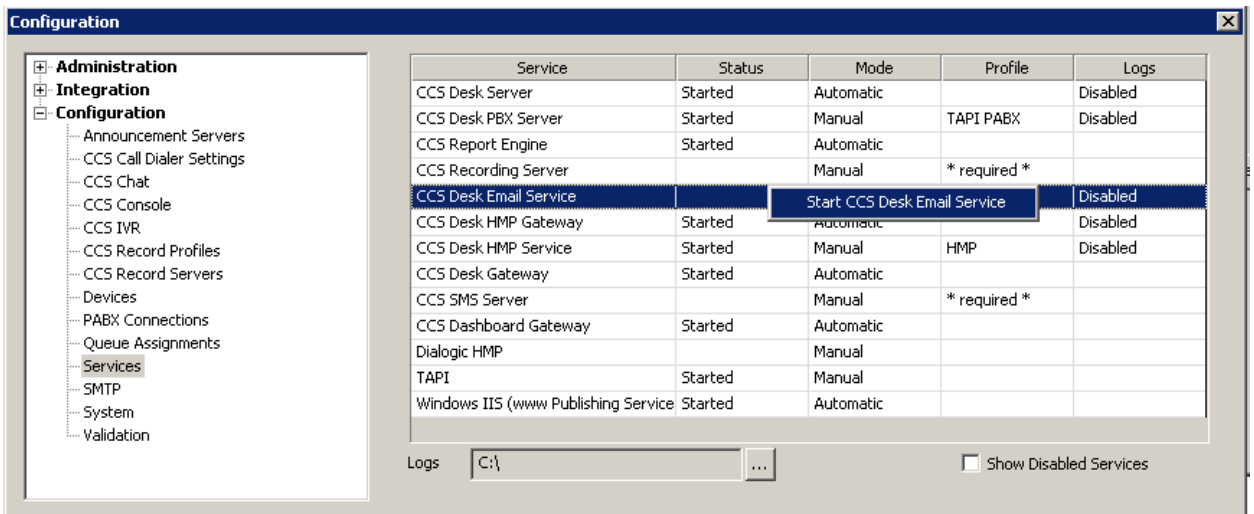
Go to the **Services** tab of **CCS Desk Manager** and enable the **Configuration mode** to install the **CCS Desk Email Service**. Do not start the service.



Right click on the Profile of CCS Desk Email Service the click on **Settings for CCS Desk Email Service**. Select the email server profile that has been created then click **OK**.



Right click on the CCS Desk Email Service then select **Start CCS Desk Email Service**.

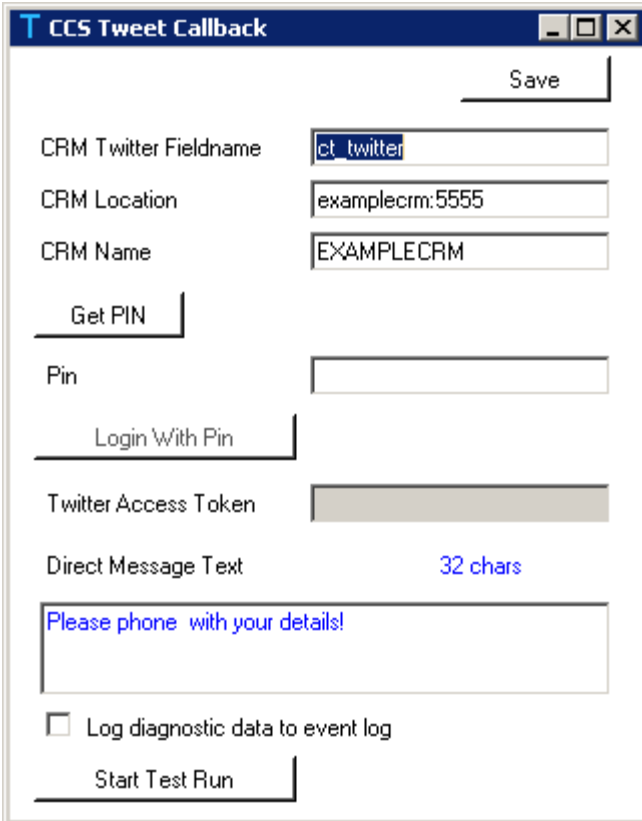


9.3 Twitter

9.3.1 Configure Twitter Callback Service

The Twitter callback program is installed via the **CCSTwitterCallbackSetup.exe** program. This will install the program, create a shortcut in the start menu, and install the services as CCS Twitter Callback. It will not start the service, however, since we need to configure Twitter first.

Running the Configuration program will show the following UI.



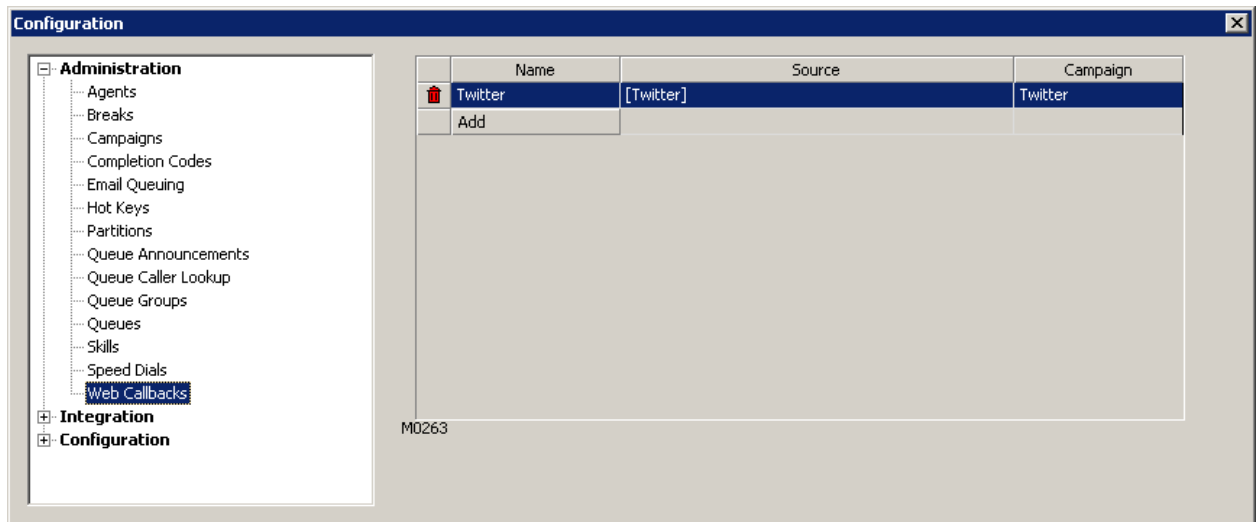
The screenshot shows a window titled "CCS Tweet Callback" with a "Save" button in the top right corner. The window contains several input fields and buttons:

- CRM Twitter Fieldname:** A text box containing "ct_twitter".
- CRM Location:** A text box containing "examplecrm:5555".
- CRM Name:** A text box containing "EXAMPLECRM".
- Get PIN:** A button.
- Pin:** An empty text box.
- Login With Pin:** A button.
- Twitter Access Token:** A greyed-out text box.
- Direct Message Text:** A text box containing "Please phone with your details!". To the right of this box is the text "32 chars".
- Log diagnostic data to event log:** A checkbox that is currently unchecked.
- Start Test Run:** A button.

Complete the Twitter authorization process by clicking **Get PIN**. You will be directed to Twitter and be directed to login into the account, and authorize the CCS Tweet Callback application. A PIN will be given once the authorization process has been completed. Write the PIN on the empty field and click **Login with Pin** to complete this setup.

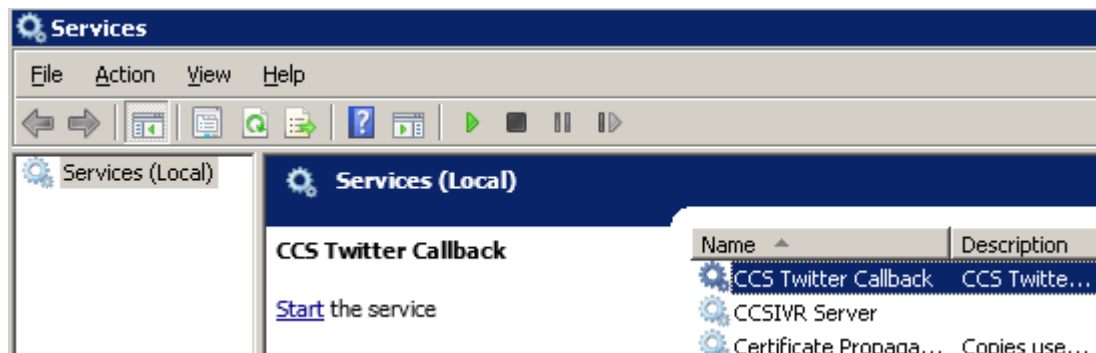
9.3.2 Configure Queue

The **Web** tab in CCS Desk Manager needs to be configured with **[twitter]** as 'Source' and linked to a campaign (**Campaign type: Callback**). Please consult the *Administration and User Manual for CCS Desk* section 2.9.33 for more information on the configuration in this tab.



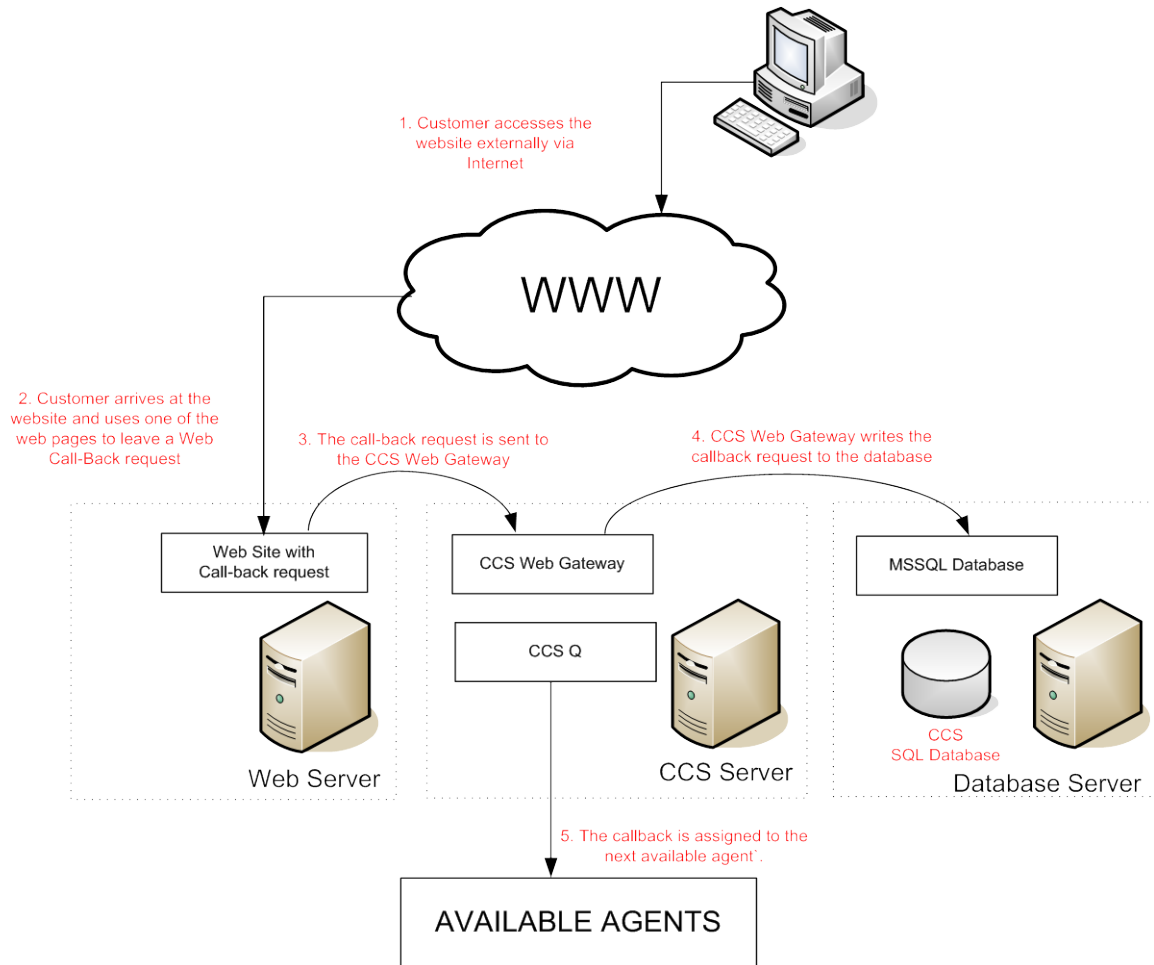
9.3.3 Start the Twitter Service

Go to Control Panel → Administrative Tools → Services and start the CCS Twitter service



10. Configuring CCS Q for Web Callback

10.1 Overview



A Call-Back button or hyperlink can be placed on a website or in an email. A prospective customer can then click the link and be taken to a form to enter their details. As well as a name and phone number, these details can include a text message and a preferred time for the call-back. The form can also include options for which queue the customer will be called from, such as sales, service, accounts or a specific product group.

After being submitted, the form data must be entered into a table in the CCS SQL Database by communicating with the CCS Web Gateway service. CCS Q will then take this information and treat the Call-back as any other incoming or outgoing call in the system, presenting it to the next available agent at the appropriate time. The Agent also has a hyperlink button that can pop the web page from which the Call-Back was requested.

Agents must enter completion code when the call-back is completed, and the completion statistics can be provided in real-time to the dashboard and for review in historical reporting. The CCS Q Real-Time screens and also historical reports log and present traffic and statistical details for Web Call-backs tasks and performance just the same as live calls in the system features.

This document does not cover the following topics which should be handled by your Web Admin / Developer.

- a) HTML, CSS, and scripts to design the web pages and forms
- b) Programming scripts / codes on the web site to integrate with CCS Desk Web Gateway.

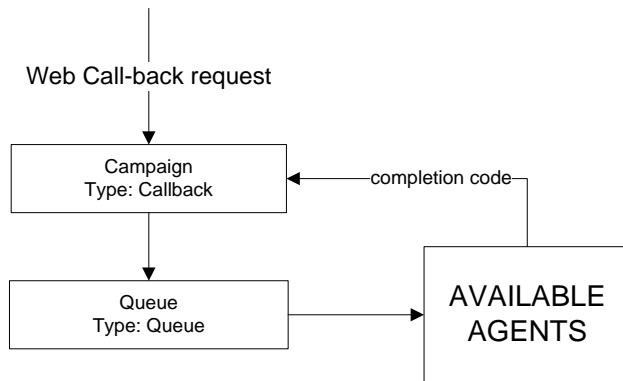
10.2 Configure the Web Server

The critical requirement for the system is the integration between the web server and the CCS Desk Web Gateway. Please consult *Integration Guide for CCS Desk* for more information about the web services methods supported by the CCS Desk Web Gateway.

A sample web form integrates with CCS Desk Web Gateway is available in CCS Report Web. Assuming the CCS Report website is installed on a machine called **CCS**, the URL is:
<http://CCS/CCS%20Report/WebGatewayTestPage.aspx>

10.3 Configure Queue

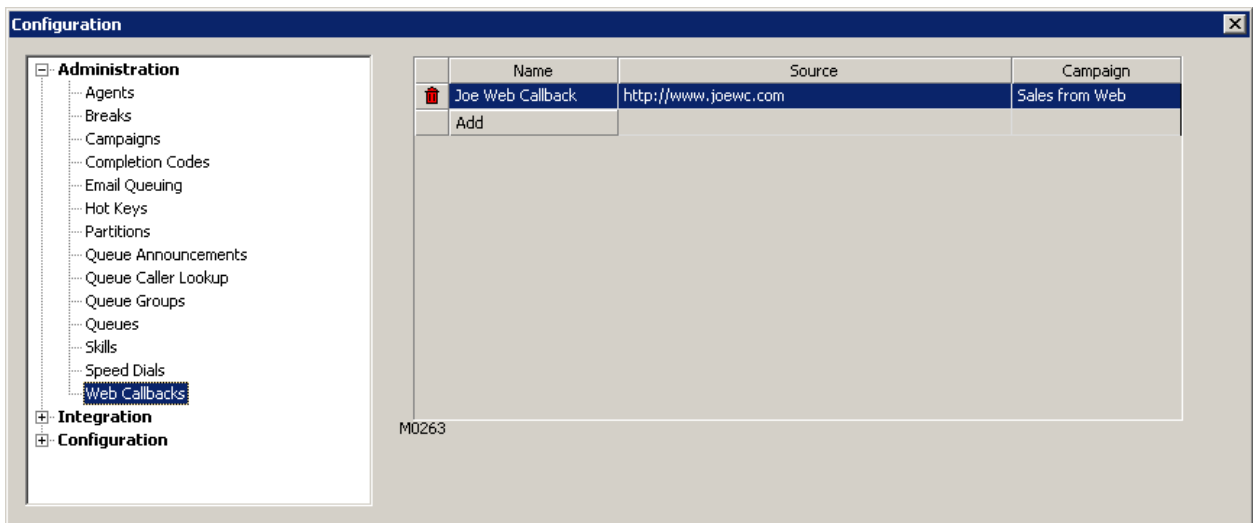
Web Call-back utilizes the campaign and queuing engine as illustrated below



It is assumed that readers already have knowledge on how to create campaigns, queues, and completion codes within the CCS system by using the CCS Desk Manager application.

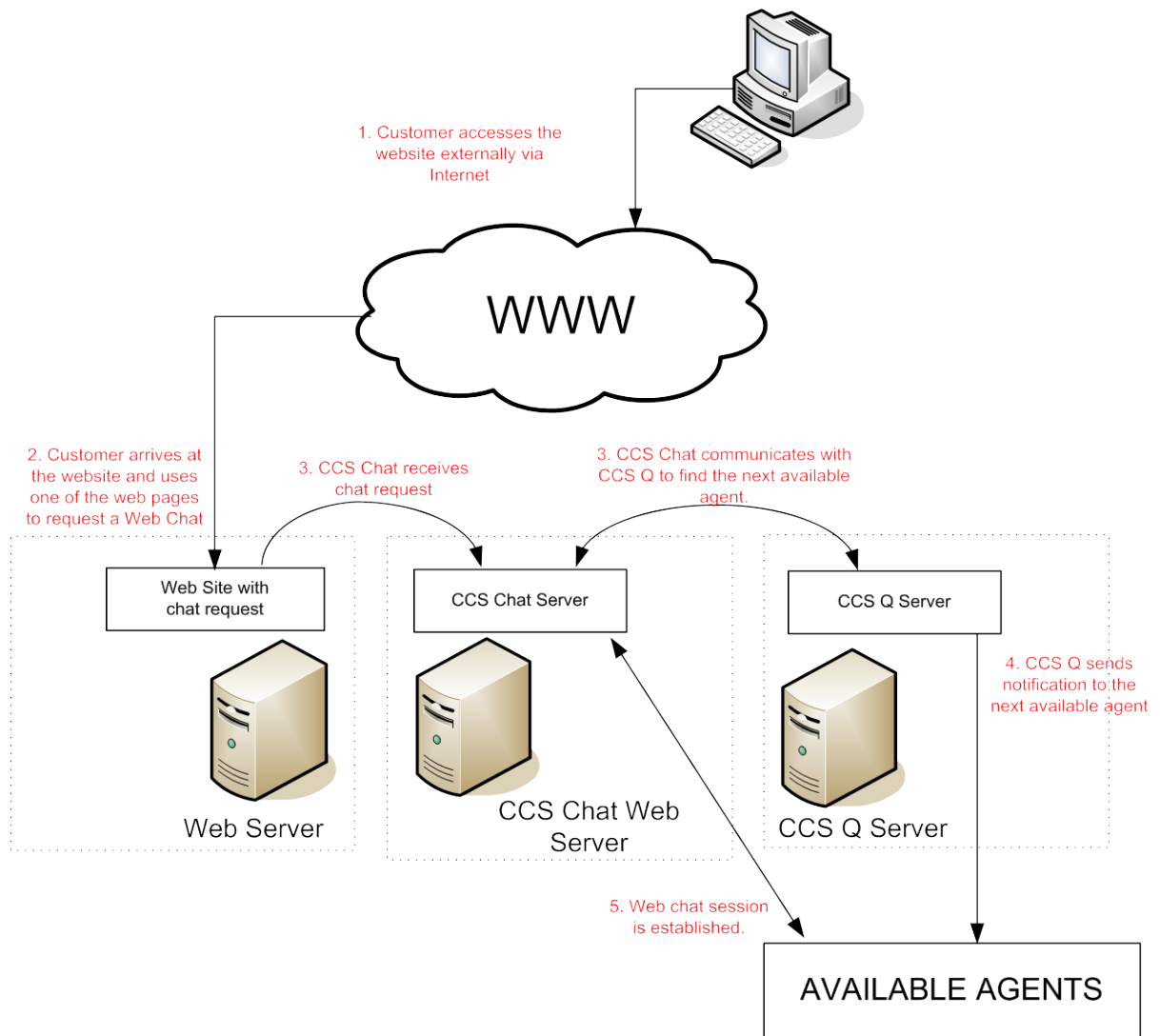
Create the Web reference to Campaigns

The **Web** tab in CCS Desk Manager needs to be configured to specify which source reference point relates to which campaign (**Campaign type: Callback**) **Please consult the Administration and User Manual for CCS Desk section 2.9.33 for more information on the configuration in this tab.**



11. Configuring CCS Q for Web Chat

11.1 Overview



Offer your customers and partners an easy way to get instant access to your team via Web-Chat Instant Messaging. CCS Chat can be deployed stand-alone and integrate with your customer database or CRM for enhancing Web Chat into your customer service mix, and/or integrated with our CCS Q for agent Multi-Media Contact Centre functionality.

Customer Chat request form

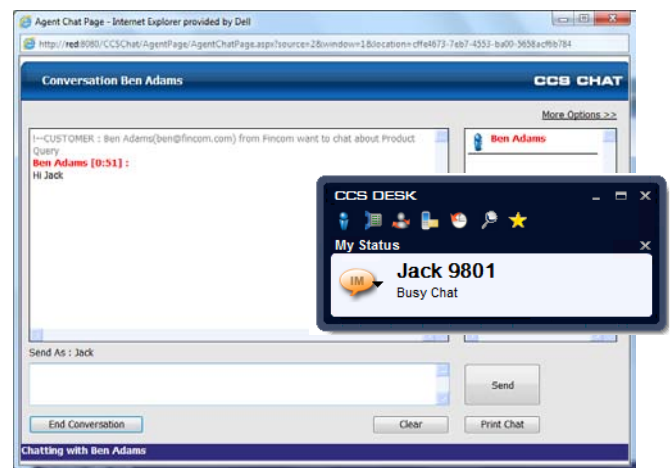


Please enter your details below: **CCB CHAT**

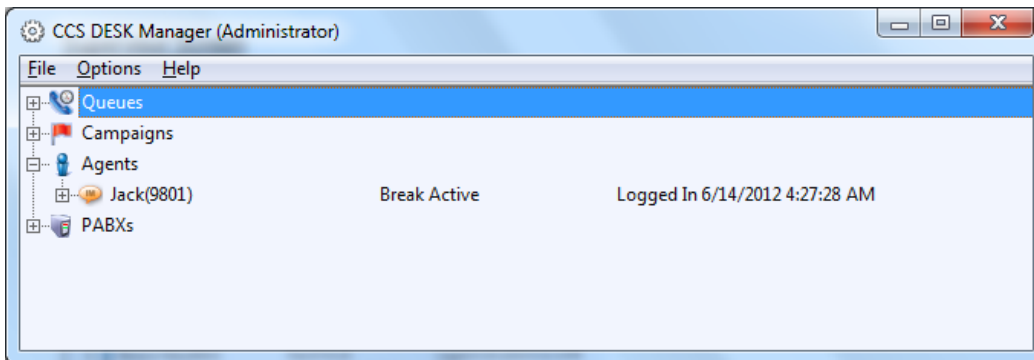
Name: Ben Adams
Email: ben@fincom.com
Company: Fincom
Description: Product Query
Request a chat with: Sales

Send Reset

Agent Screen



Supervisor Screen

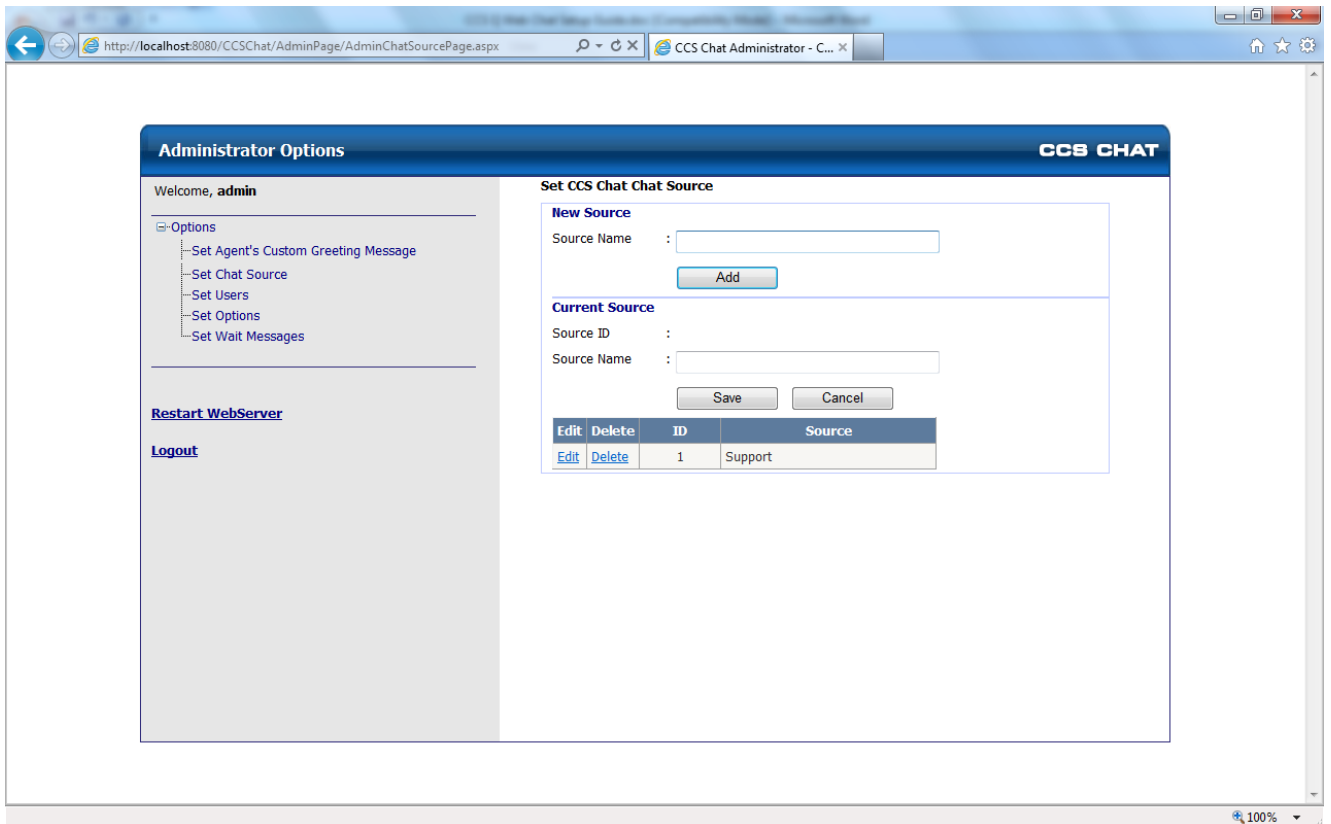


Requirements

- CCS Chat module
 - o CCS Chat requires Microsoft IIS to host the server web components.
 - o CCS Chat also requires Internet Explorer v6 or above for the client
- A website that provides the 'Web Chat' button, preferably runs on Microsoft IIS Web Server, that links to the CCS Chat request page.

11.2 Configure CCS Chat

Chat source must be created from the CCS Chat administration page. The chat source information will be matched against the CCS Q configuration shown in the next section. Please consult the *Administration and User Manual for CCS Chat* document for more information.

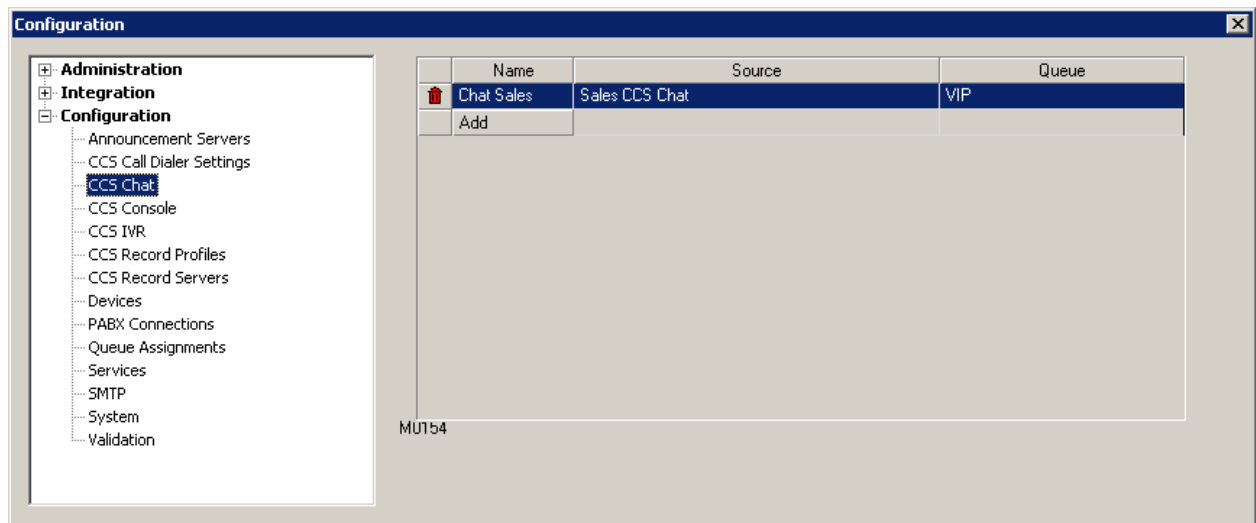


11.3 Configure Queue

Chat request is sent to the next available agent through a queue. It is assumed that readers already have knowledge on how to create queues (**Queue type: Queue**) and assign agents to it within the CCS system by using the CCS Desk Manager application.

Create the CCS Chat reference to Queues

The **CCS Chat** tab in CCS Desk Manager needs to be configured by matching the source name in CCS Chat with a queue. **Please consult the *Administration and User Manual for CCS Desk* section 3.10.17 for more information.**



12. Configuring CCS Call for ODBC Integration

12.1 ODBC

Microsoft Windows Operating System has something called ODBC, which stands for Open Database Connectivity. External Data Sources can be connected to Windows by using ODBC. This allows Windows and applications running in Windows to access data from a variety of database management systems. For example, if you have a program that requires access data to a SQL database, ODBC will let you use the same program to access data in a Visual FoxPro database.

This document describes how campaign call records can be imported into CCS Call campaigns from an ODBC data source, such as a Microsoft Excel spreadsheet or a SQL database.

Note that you may need to install certain ODBC drivers to your machine in order to connect to your data source.

12.2 Configure Windows ODBC

To open ODBC configuration on a 32 bit machine, go to **Start → Control Panel → Administrative Tools → Data Sources (ODBC)**.

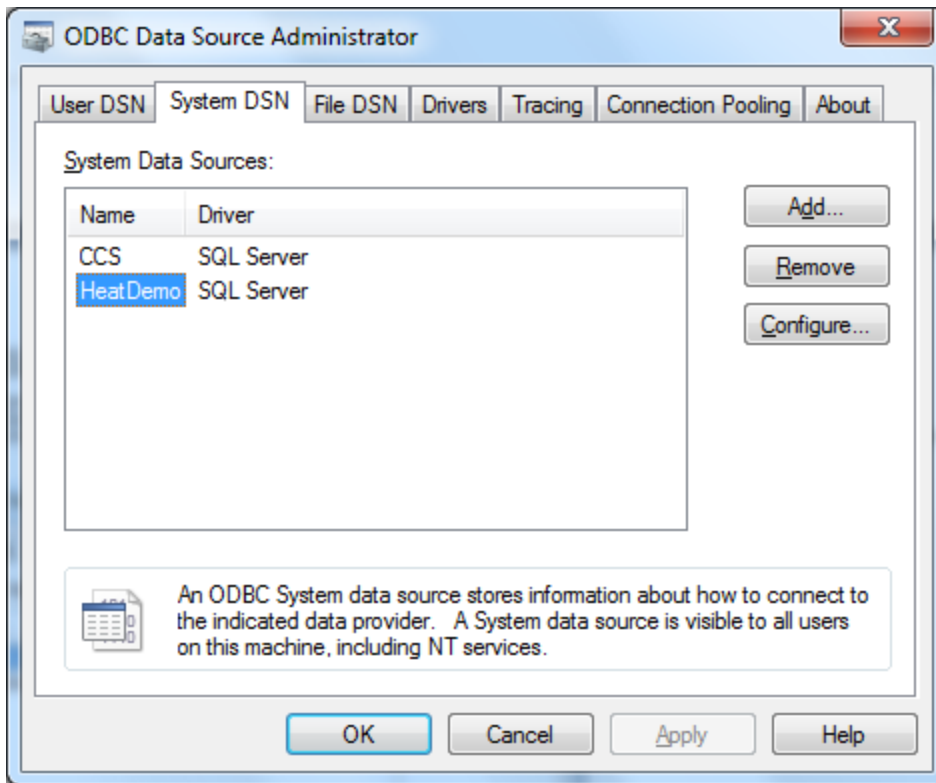
There are 2 ODBC configurations on a 64 bit machine and to access the one CCS Call utilizes, open the application in **C:\Windows\SysWOW64\odbcad32.exe**. Note that the Administrative Tools version is the 64bit version that is not compatible to CCS Call.

There are several options inside the ODBC administrator application, but we will only need to focus on 2 tabs: User DSN and System DSN

USER DSN – These data sources are local to a computer and accessible only by the current user of Windows.

SYSTEM DSN – These data sources are local to a computer but not user-dedicated; any Windows user with privileges can access a system DSN.

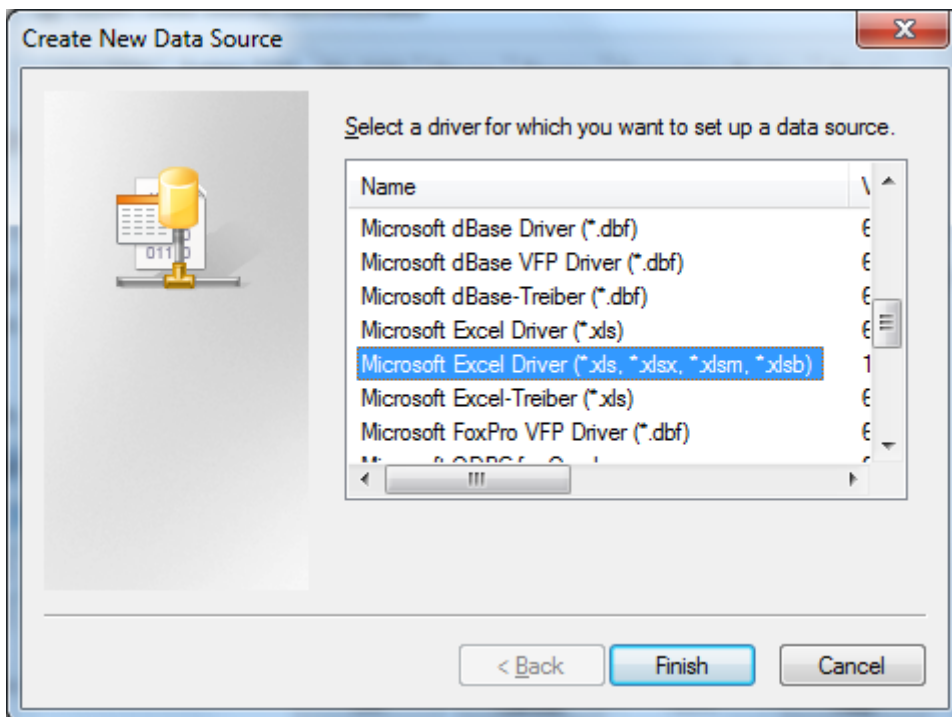
Note that unless there are specific restrictions or security policies in place, it is recommended that you always create your data sources under the SYSTEM DSN.



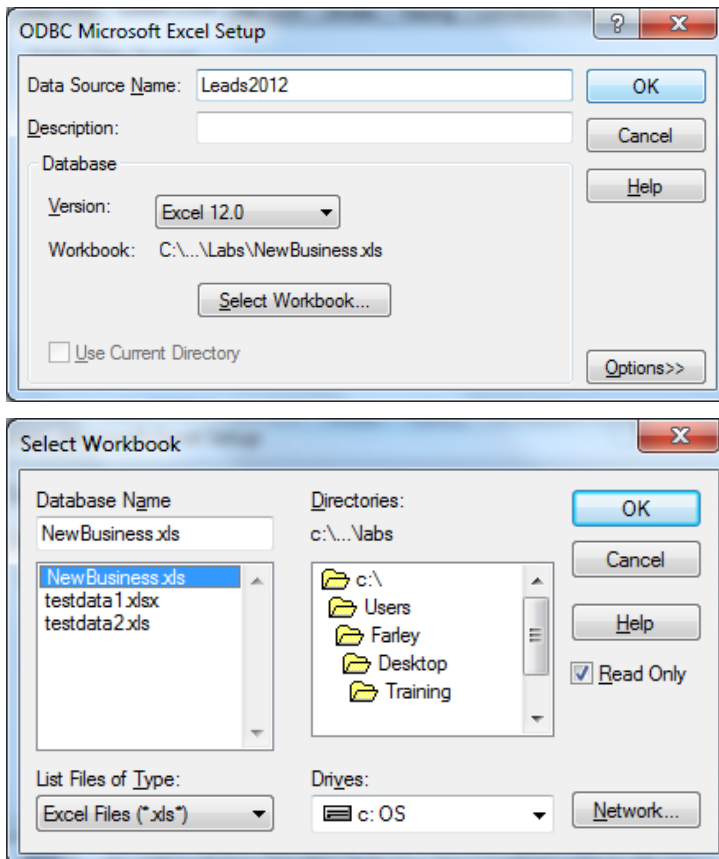
Clicking on the System DSN tab will give you a list of all system DSNs, including the name and associated driver of each DSN. Double-click on a DSN to display the driver-specific data source setup dialog box, similar to clicking the Configure button; use the Add or the Remove button to create or delete data sources respectively.

Example 1 – add new data source (Excel 2007)

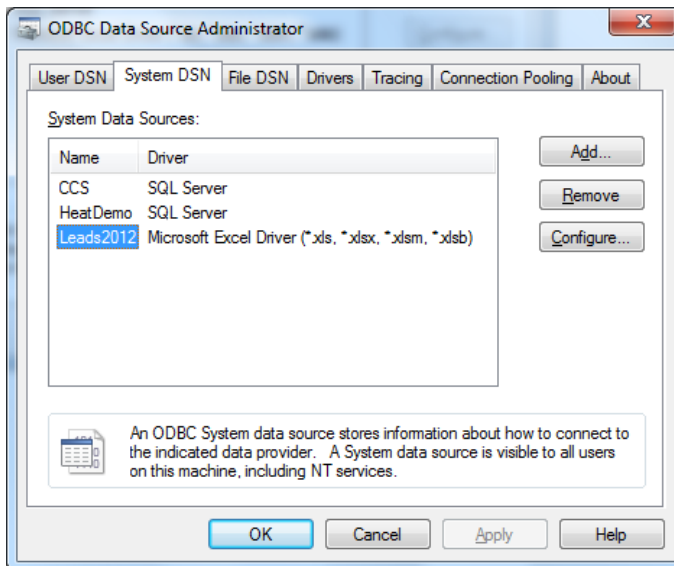
1. Because you will usually maintain a number of spreadsheets, it is recommended that you create a new folder to store them in one location.
2. Click on **Add** on the System DSN, and select the **Microsoft Excel Driver** that supports .xlsx. If you do not have this driver available, you will need to download and install it from the Microsoft Website. Alternatively you can save the spreadsheet into .xls format thus allowing you to use the other driver. Click **Finish** to proceed.



3. Enter the **DSN name** – each DSN must have a unique name. Modify the Excel version as required, and then click on the **Select Workbook** button to locate the file. Click **OK** to finish the setup.

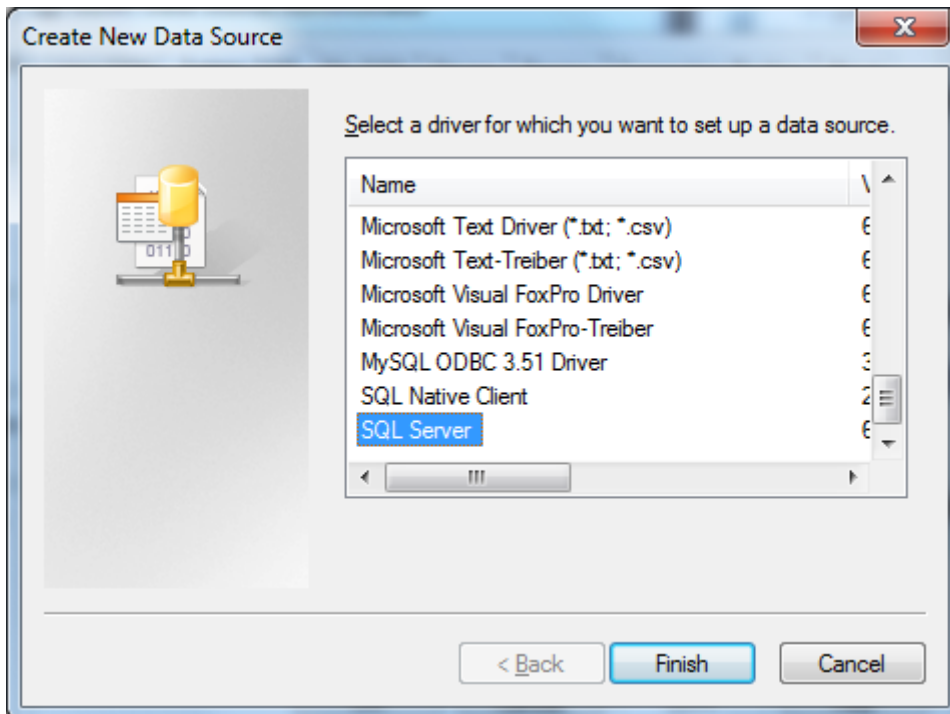


1. You will now see the newly created DSN on the list of System data sources.

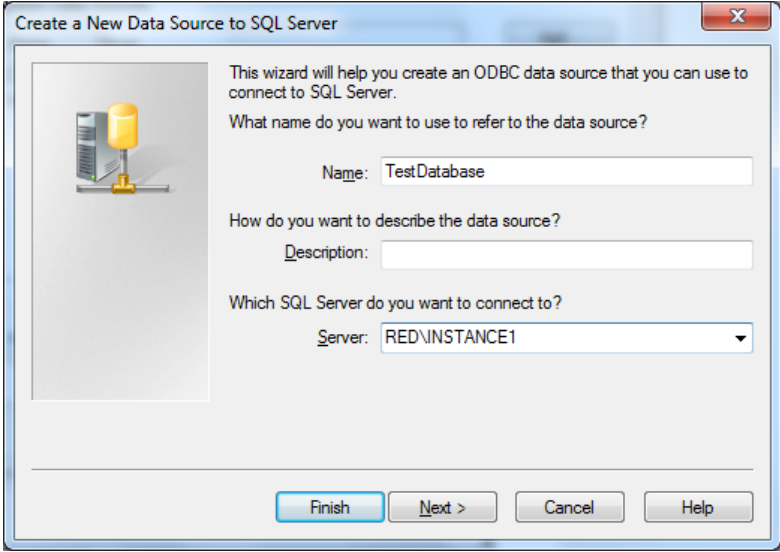


Example 2 – add new data source (Microsoft SQL Server)

1. Click on **Add** on the System DSN, and select the **SQL Server** option. Click **Finish** to proceed.



2. Enter the **Name** of the DSN – each DSN must have a unique name. Enter the database **Server** machine name or the IP address. The SQL Server instance name must also be included, if applicable. Click **Next**.



Create a New Data Source to SQL Server

This wizard will help you create an ODBC data source that you can use to connect to SQL Server.

What name do you want to use to refer to the data source?

Name: TestDatabase

How do you want to describe the data source?

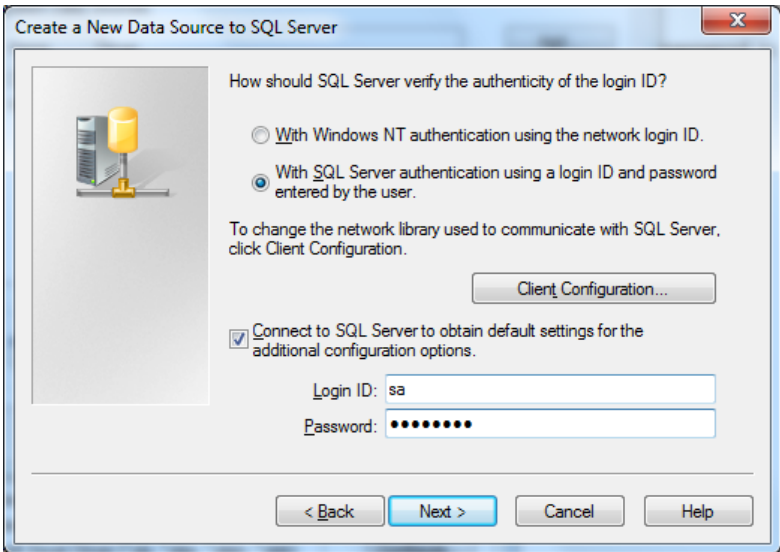
Description:

Which SQL Server do you want to connect to?

Server: RED\INSTANCE1

Finish Next > Cancel Help

3. Select the **authentication mode** (Windows / SQL), and enter the appropriate **username** and **password** to complete the configuration. Note that it is recommended that the SQL Server is configured to allow SQL Authentication i.e. Mixed Mode, and to use SQL Authentication to configure ODBC. Click **Next**.



Create a New Data Source to SQL Server

How should SQL Server verify the authenticity of the login ID?

With Windows NT authentication using the network login ID.

With SQL Server authentication using a login ID and password entered by the user.

To change the network library used to communicate with SQL Server, click Client Configuration.

Client Configuration...

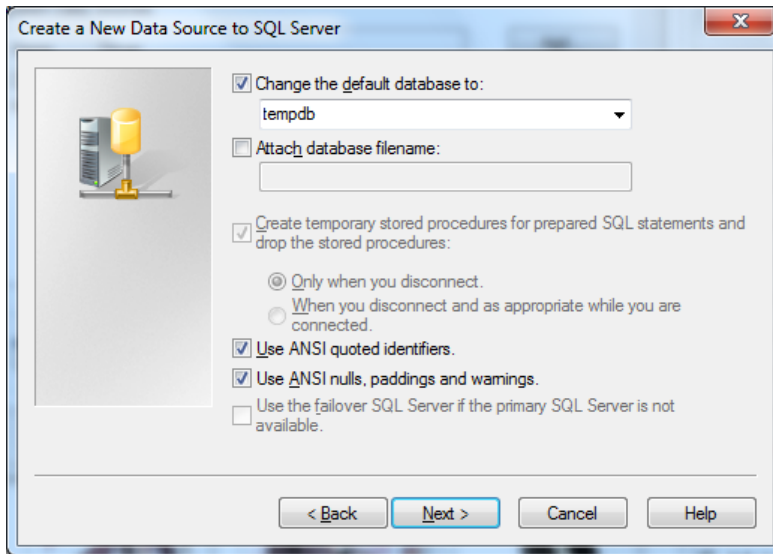
Connect to SQL Server to obtain default settings for the additional configuration options.

Login ID: sa

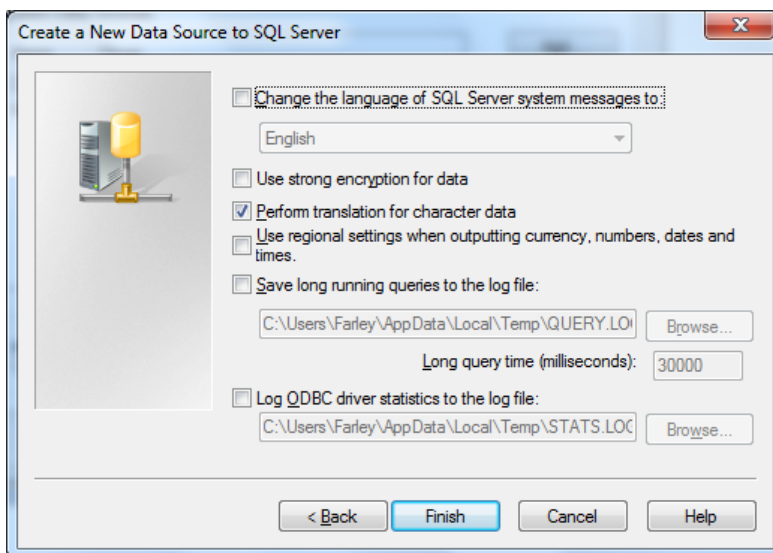
Password: ●●●●●●

< Back Next > Cancel Help

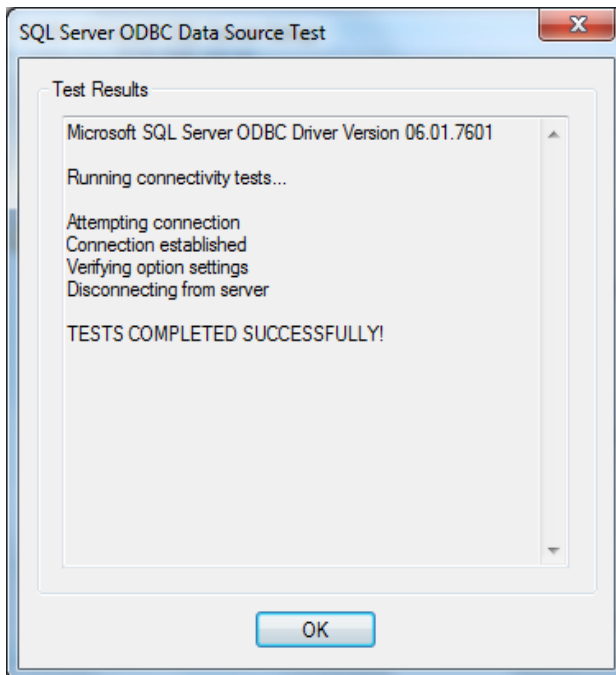
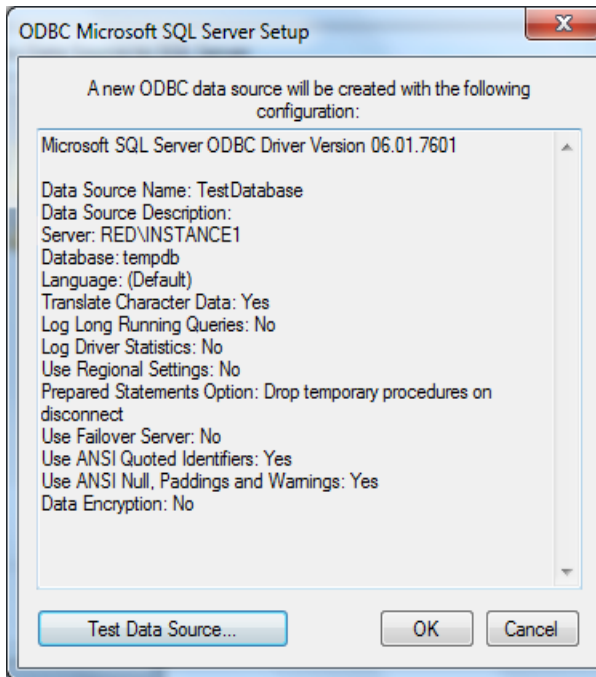
4. Tick to **Change the Default Database** to the database you wish to connect to. Click **Next**.



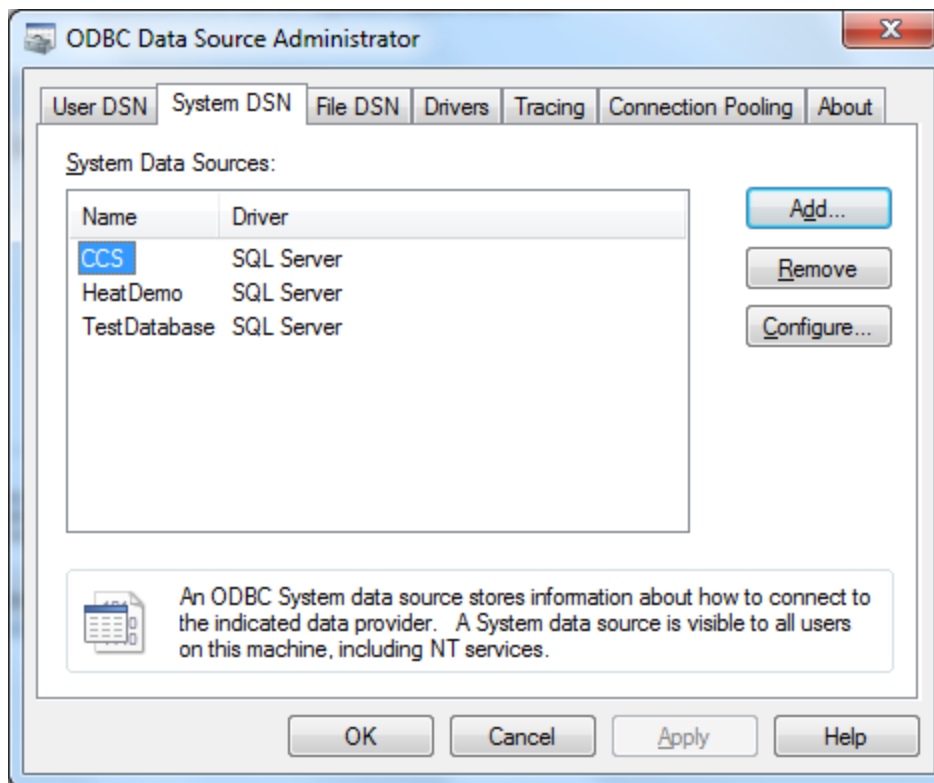
5. Typically you do not need to alter any settings in here. Click **Finish**.



6. Click **Test Data Source** to ensure all your configurations are correct. Click **OK** to finish the setup.



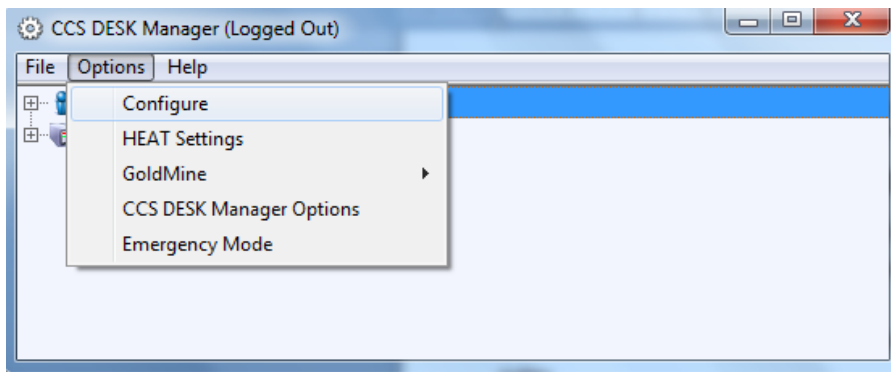
7. You will now see the newly created DSN on the list of System data sources.



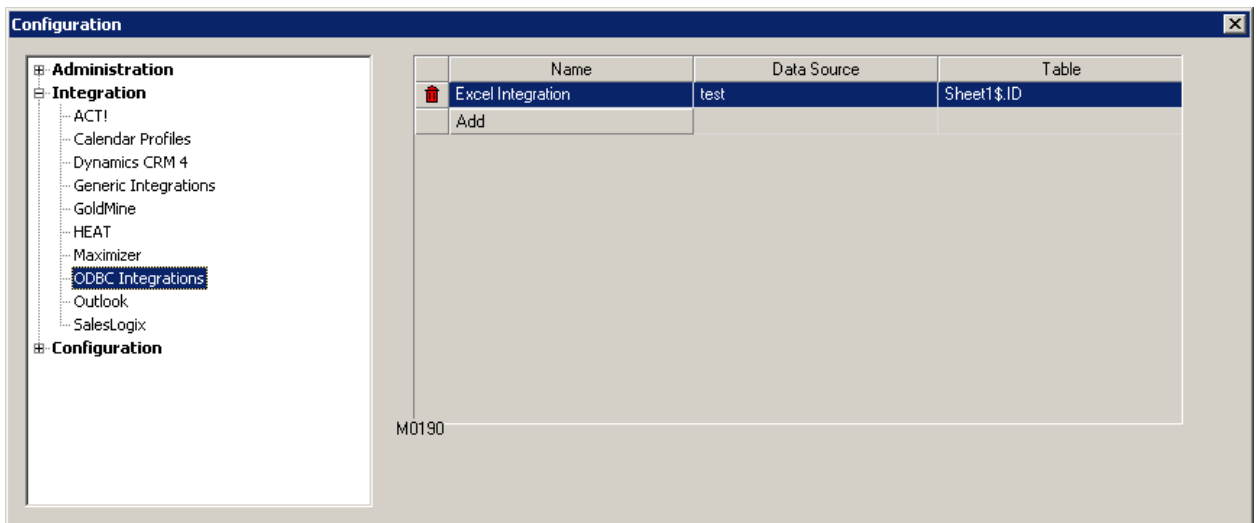
12.3 Configure CCS Desk Integration to ODBC

Once the Windows ODBC has been configured, we can now configure the integration into the CCS system by using the CCS Desk Manager application.

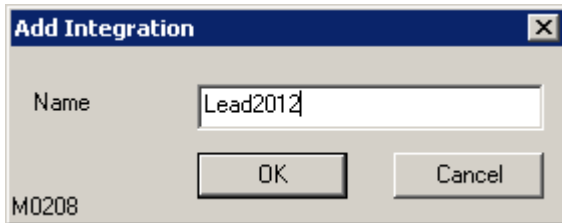
1. Open **CCS Desk Manager** and go to **Options → Configure**, and login as a user that has administrative rights.



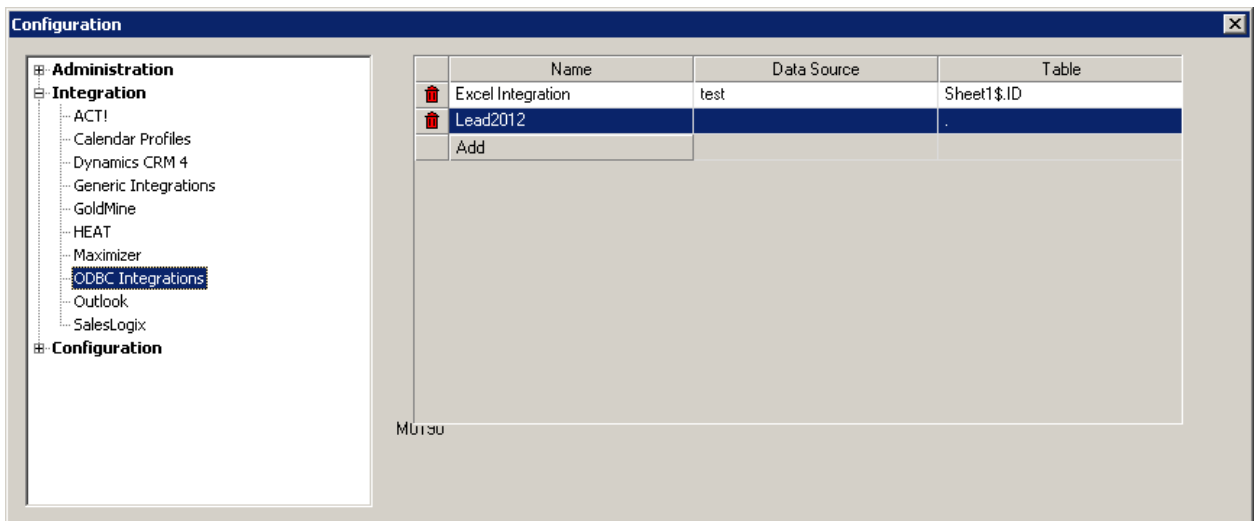
2. Find the **ODBC Integrations** tab. You will see a list of ODBC integration profiles that have been created. Click on the Add button to create a new profile, or the 'red bin' icon to delete.



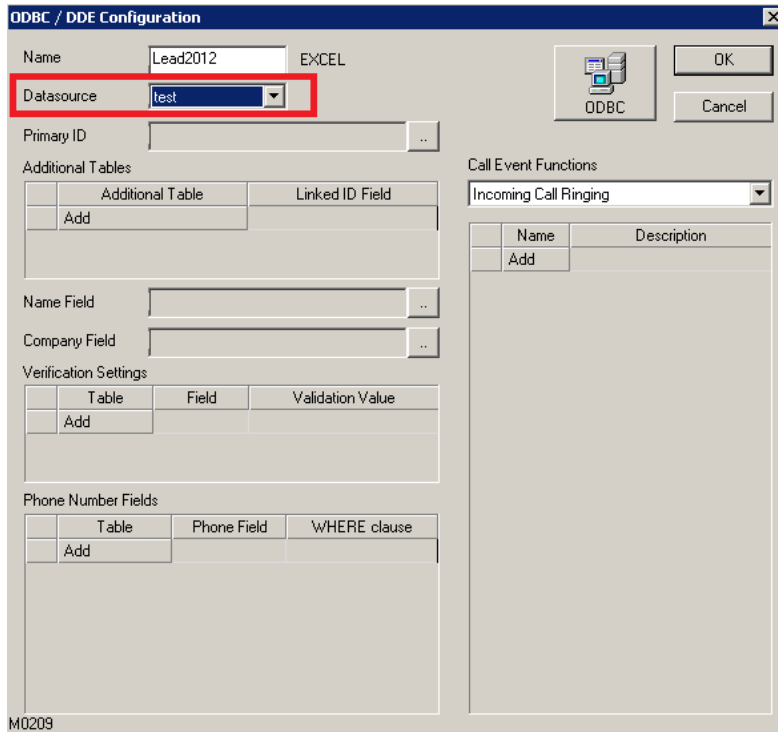
3. As you add a new profile, you will be asked to provide a **name** to the CCS Desk ODBC integration profile. It is recommended to use the same name as the Windows ODBC profile that will be integrated, in order to avoid confusion.



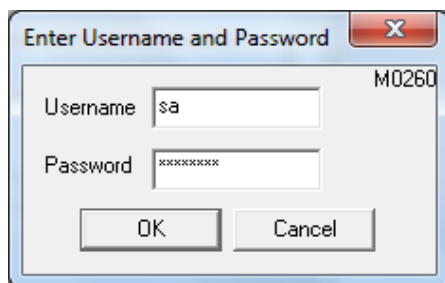
Double click on the created profile to open the configuration screen.



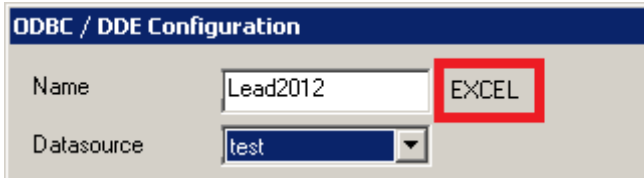
4. Select the Windows ODBC profile as the **Datasource**.



Some ODBC driver such as SQL Server may require a username and password to be entered on its first setup. Use the same username and password that was used to create the Windows ODBC profile.



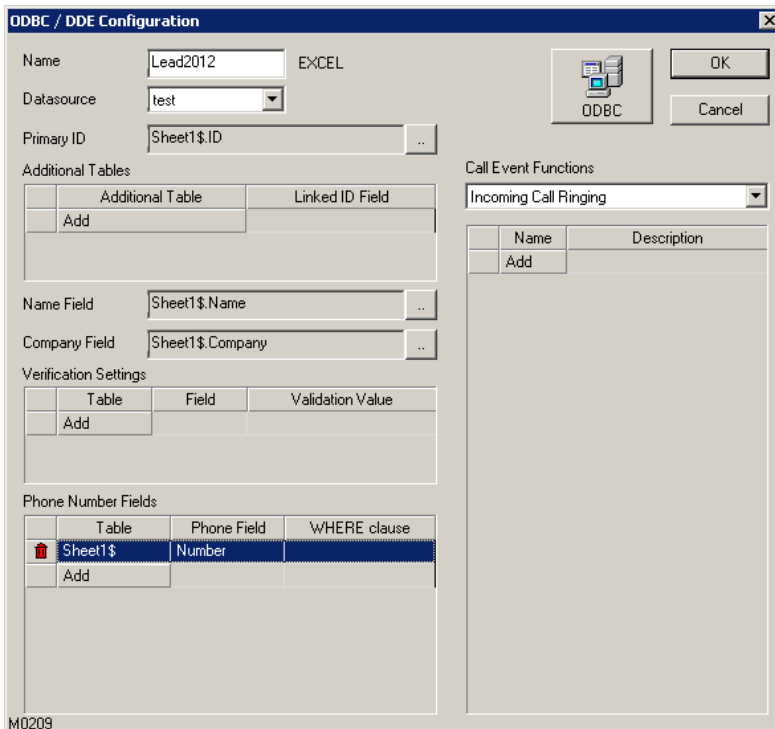
When CCS Desk has successfully connected to the selected data source, it will display the ODBC Driver type at the top.



5. Configure the **Primary ID**, **Name**, **Company**, and **Phone Number Fields** to point to the appropriate tables and columns in the data source. You can add multiple phone number columns into the list provided.

Additional Tables can be used to link more than 1 table in the data source. For example, if the 'name' is at table A, but the 'phone' field is at table B. The two tables must be linked using the field configured as the Primary ID.

Verification Settings is used to add validation into the data being read. For example, only find records in the data source where the 'active' field is equal to 'true'.

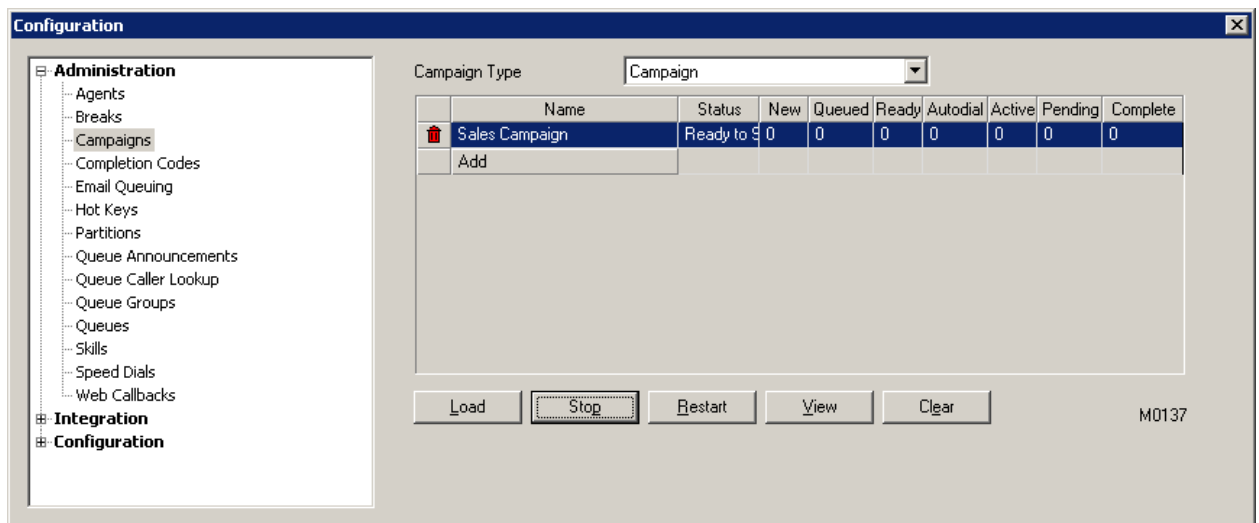


Click **OK** when all configurations have been entered.

12.4 Configure Campaign with ODBC

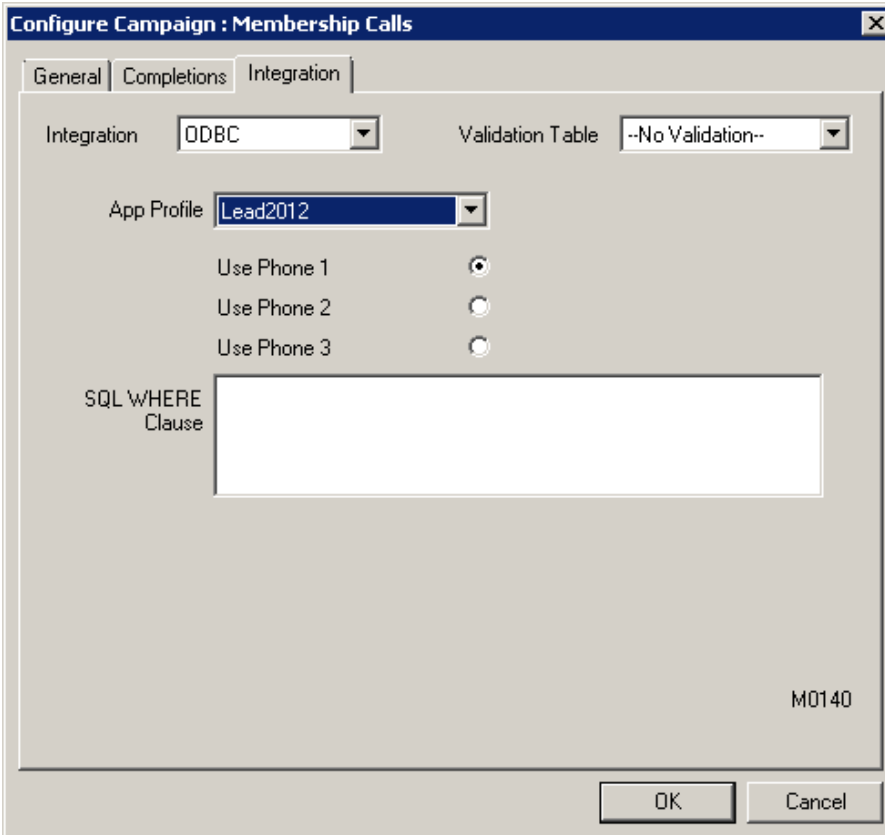
The CCS Desk ODBC integration profile can now be assigned and loaded into the outbound telemarketing campaign.

1. Go to the **Campaign** tab and set **Campaign Type: Campaign**. Double click on a campaign to open its configuration. The detailed configuration of the campaign is not part of the scope of this document.



2. Go to the **Integration** tab within the campaign configuration. Change the integration value to **ODBC** and select the created CCS Desk ODBC integration **App Profile**. Leave the radio button set on Use Phone 1.

Additional 'SQL WHERE Clause' can be added that acts similarly to the Verification Settings in the ODBC integration profile settings. The input must follow the syntax for SQL queries.

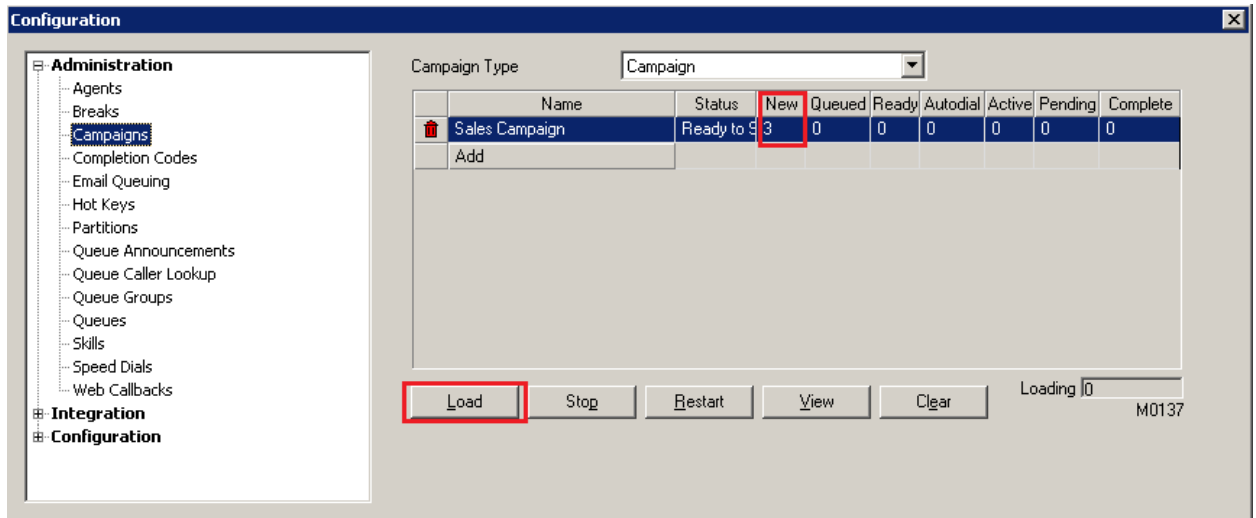


The screenshot shows a dialog box titled "Configure Campaign : Membership Calls" with a close button (X) in the top right corner. The dialog has three tabs: "General", "Completions", and "Integration", with "Integration" selected. The "Integration" tab contains the following fields and controls:

- "Integration": A dropdown menu set to "ODBC".
- "Validation Table": A dropdown menu set to "--No Validation--".
- "App Profile": A dropdown menu set to "Lead2012".
- Three radio buttons labeled "Use Phone 1", "Use Phone 2", and "Use Phone 3". The "Use Phone 1" radio button is selected.
- "SQL WHERE Clause": A large empty text input field.
- Bottom right corner: The text "M0140".
- Bottom center: "OK" and "Cancel" buttons.

Click **OK** when finished.

3. Click on **Load** button to start loading your campaign with records from the data source.
The number of successful records loaded will be shown in the **New** column.



The campaign is now ready!

13. Troubleshooting

13.1 TAPI Troubleshooting

13.1.1 TAPI Tools

CCS recommends the use of the following tools to assist any TAPI troubleshooting and/or analysis:

TAPI Soft Phone
TAPI Call Monitor

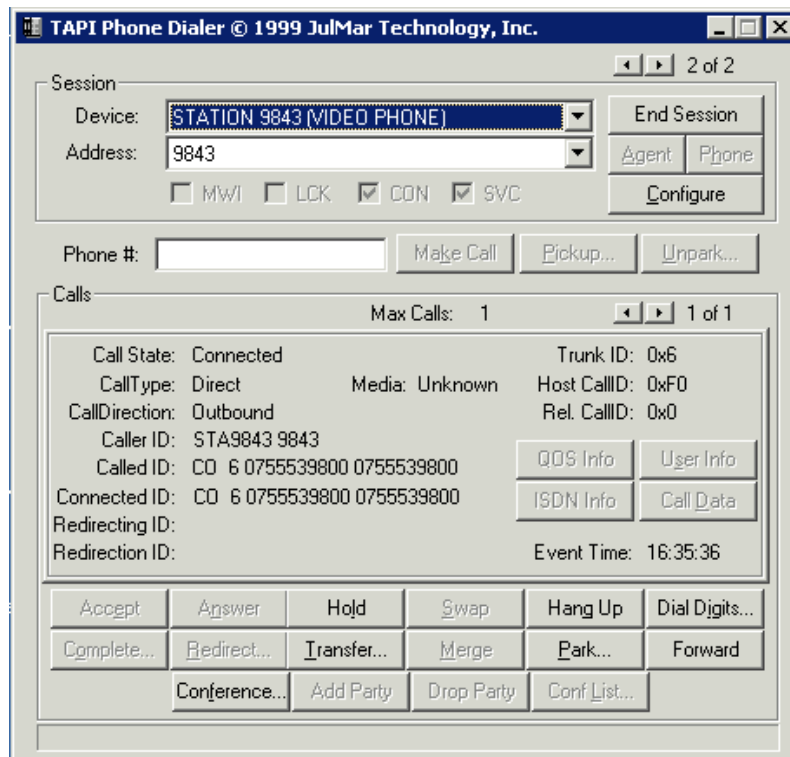
→ TAPI Soft Phone

http://www.julmar.com/tapi/native-tapi-samples/tapi_soft_phone.zip

This application allows you to monitor / control telephony devices through TAPI in a similar fashion to CCS Desk. It is a free program called **PHONE.EXE**

Run a few **checks** to confirm telephony is working correctly:-

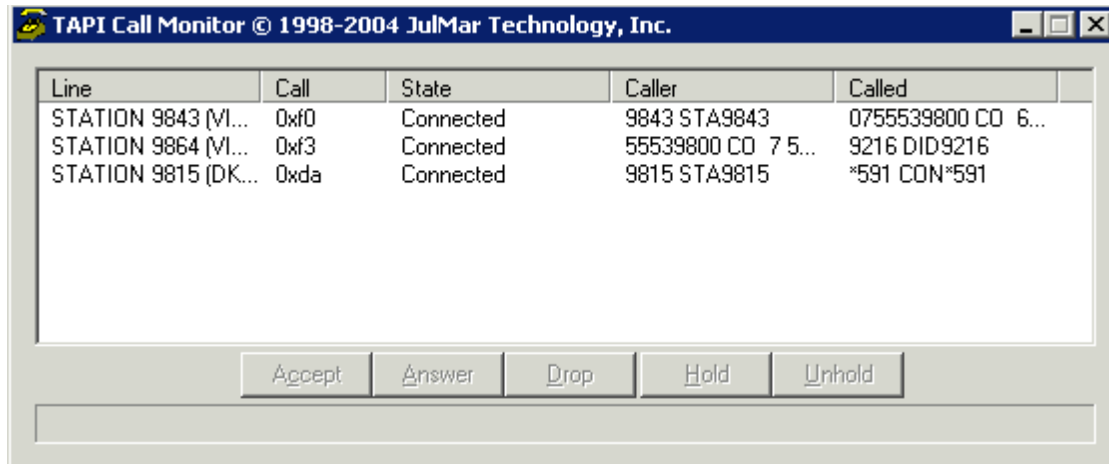
- Ensure all TAPI devices are listed.
- Start a session on the nearest extension and ensure control can be achieved.
- Lift handset and view the devices changed status, make a call, hang-up a call etc.



→ TAPI Call Monitor

http://www.julmar.com/tapi/native-tapi-samples/tapi_call_monitor.zip

The Call Monitor automatically opens all TAPI devices thus providing a single screen to monitor all TAPI traffic and information, however there are lesser TAPI functions supported by this application.



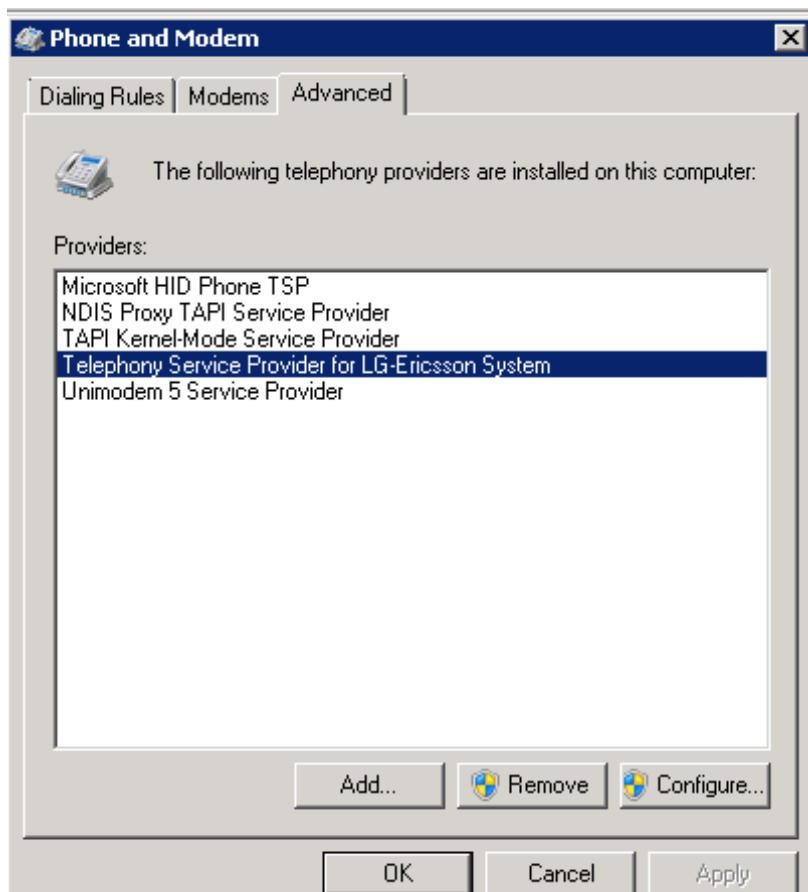
13.1.2 TAPI Configuration and Management in Windows

Microsoft Windows provides **tapimgmt.msc** to manage TAPI. This can be used to view the TSP and devices registered with TAPI on this machine.

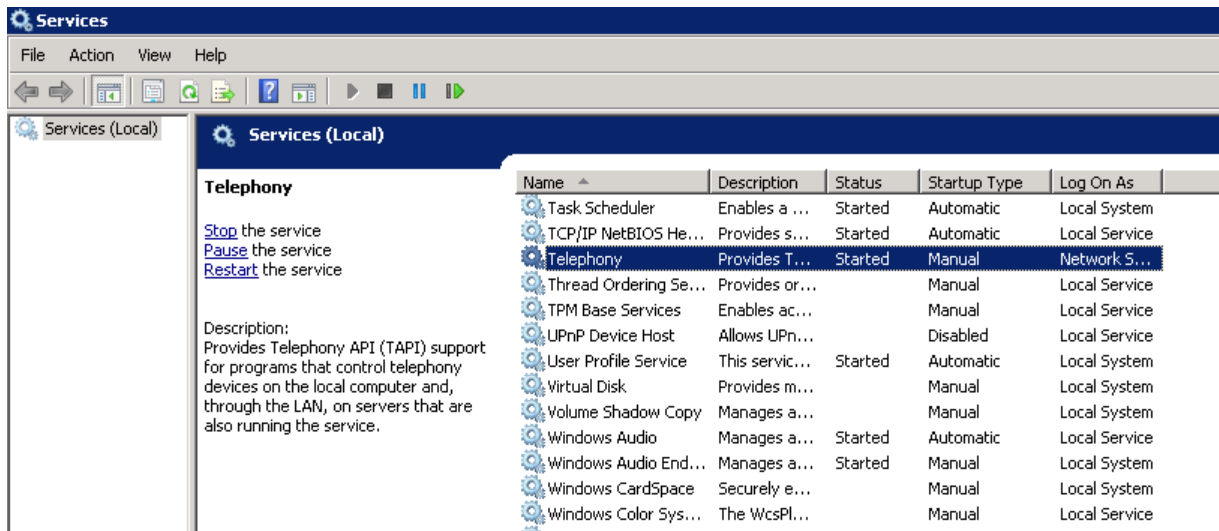
Note

This tool is not available by default in Windows XP → The Administrator must first install the Windows Server 2003 Administration Tools Pack which is downloadable from the Microsoft website.

The installed TSP can also be viewed, managed, and configured via **Control Panel -> Phone and Modem -> Advanced** tab



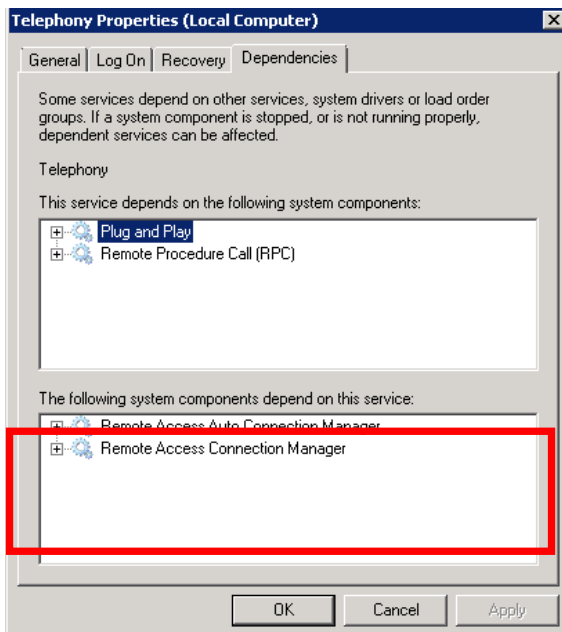
Telephony runs as a service within Windows called **Tapisrv** which can be administered with **services.msc**



Note

There are other services that depend on TAPI.

CCS recommends these services to be made '**disabled**' which will allow the TAPI service to be restarted without rebooting the machine. Please consult with the IT System Administrator before disabling any services.



13.1.3 Restarting TAPI

When there is an issue with TAPI that requires the service to be restarted, it is very critical to stop any running applications that utilize TAPI, such as **TAPI Soft Phone** or **CCS Desk**

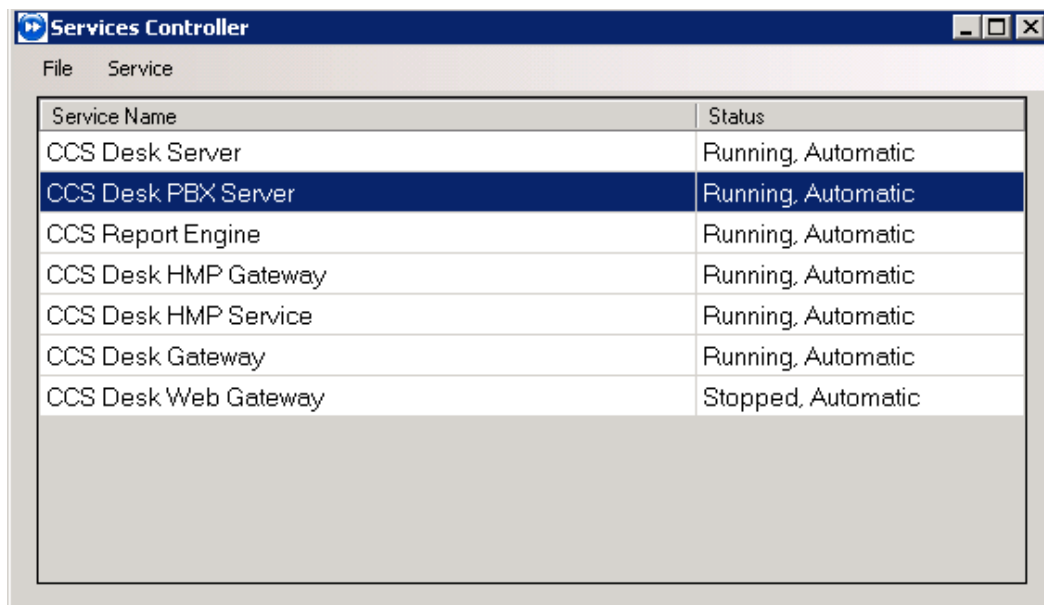
PBX service. TAPI may fail to restart otherwise, and might require a reboot before the service can be restored.

→To stop TAPI Soft Phone or TAPI Call Monitor -> simply close the application.

→To stop CCS PBX service

→ Use **Services.msc** to stop the **CCS Desk PBX server** service or

→ Use the installed **CCS Service Manager** application to perform the same.



Once TAPI has successfully restarted → The applications can be started again.

Note they may take longer to load due to TAPI initialization

13.1.4 Recovery of Telephony Service

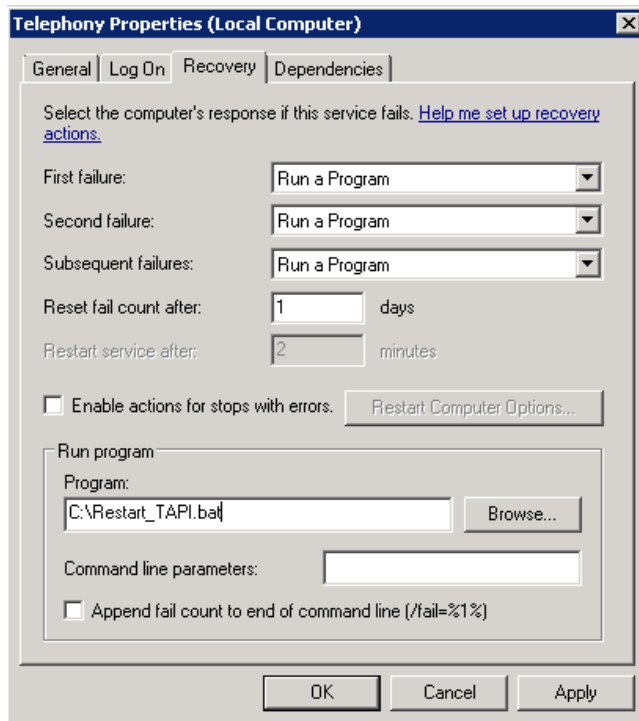
The **Telephony service** must be configured to properly recover itself – and most importantly **reconnect CCS Desk PBX service** – in the event of a TAPI service failure.

CCS recommends the creation of a simple **batch file** called RESTART_TAPI that executes the following commands:

```
NET STOP PABXSERVSVC
NET STOP TAPISRV
NET START PABXSERVSVC
NET START TAPISRV
```



The batch file can then be configured as a **recovery** step on the TAPI service.

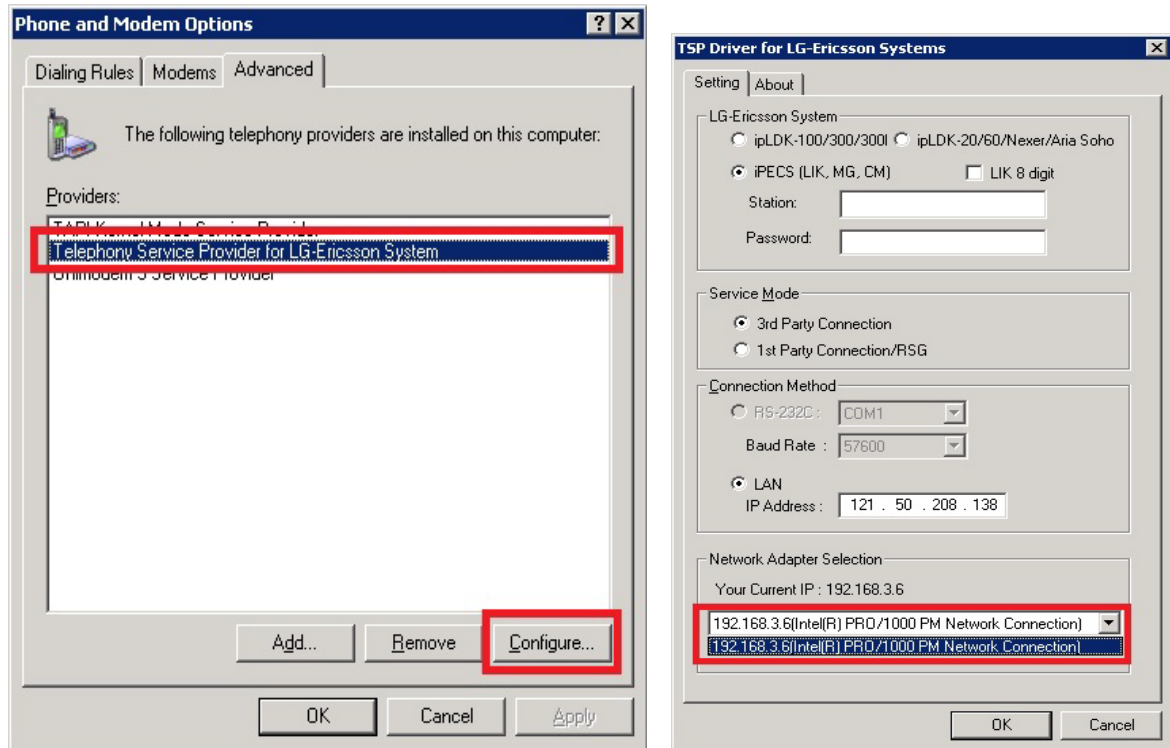


13.1.5 TSP Driver / Telephony Service Crashes When Accessed

If the TSP Driver has an unused NIC selected, it will crash the Telephony Service. This will affect the operation of CCS applications which rely on the TAPI.

You will need to access the TSP Driver Configuration, this can be found in **Control Panel → Phone and Modem Options → Advanced**

Ensure the NIC selected is the connected and tested NIC for the PBX subnet.



13.2 CCS Desk

13.2.1 Stuck Call in CCS Desk Client

Problem

Tom is using CCS Desk to monitor and control extension 207. After the call has ended on the actual telephony device, CCS Desk does not clear the call and it still shows an active call.

Analysis

On the server, we use TAPI Soft Phone to also monitor 207. If TAPI Soft Phone also shows a call is occurring at the device, then it is highly likely to be a TAPI fault.

Troubleshooting Steps

- Attempt to Hang Up the 'stuck' call with TAPI Soft Phone.
- If the 'stuck' call is cleared:
 - Check with CCS Desk.
 - If CCS Desk has cleared the call, the issue is now resolved.
 - If CCS Desk still shows an active call, restart CCS Desk PBX Server service
- If the 'stuck' call cannot be cleared
 - Close TAPI Soft Phone
 - Run the Restart_TAPI batch file

Confirmation

- Run TAPI Soft Phone and monitor 207 again.
- Make a call and hang-up the call.
- TAPI will indicate that there is no active call on this device.
- Perform the above with CCS Desk.

13.2.2 Customer name does not 'pop' in CCS Desk Client

Problem

Customer calls in from Company ABC but their name and number do not appear to the Agent in CCS Desk.

Analysis

CCS Desk integrates with CRM to obtain customer information.

Troubleshooting Steps

- If an ODBC entry is used on client workstations to connect to the CRM database:
 - Ensure the ODBC entry is correct i.e. able to connect to the CRM database.

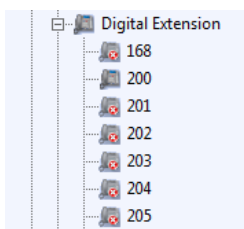
→ If this is only happening for 1 user → Check the CCS Desk agent has the correct Integration profile assigned to them

→ If this is happening for everyone → Check the Integration configuration using the CCS Desk Manager Configuration.

13.2.3 Extensions are showing offline/unavailable in CCS Desk Manager

Problem

In CCS Desk Manager - under the PABX - all/some Extensions are showing offline



Troubleshooting Steps

→ Restart the CCS PABX service

→ If the extensions come back on line, the issue is resolved.

→ If the issue persists, TAPI must be restarted

13.2.4 Extensions are not shown in CCS Desk Manager

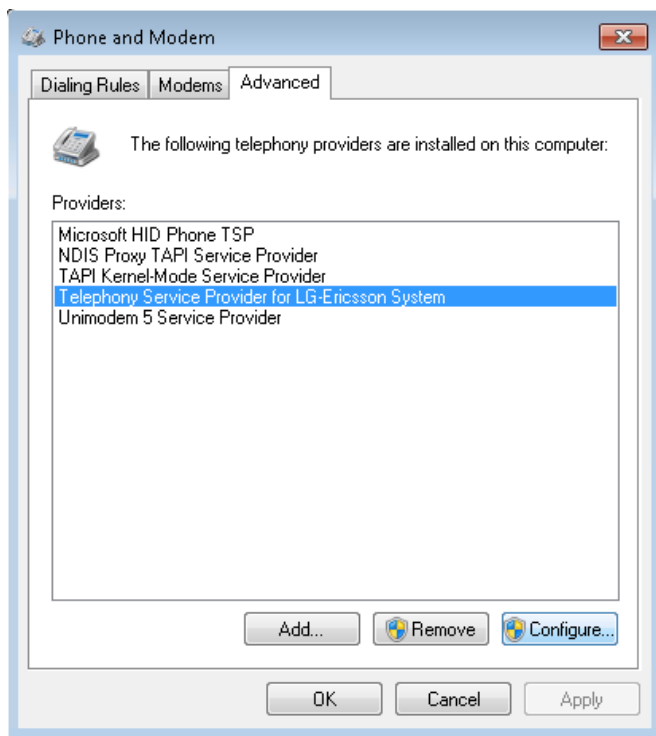
Problem

In CCS Desk Manager- no extensions are visible.

Troubleshooting Steps

→ Go to Control Panel - Phone and Modem - Advanced and check that the TSP driver is installed with the correct IP address of PABX.

→ Ping test the PBX.



- Check in **tapimgmt.msc** that Windows can see the extensions
- In CCS Desk Manager – under PABX, check that CCS can see the extensions
- Try restarting the CCS Desk PBX Service and Telephony service → test to see if this works
- Try restarting the CCS Desk Server Service first then all other CCS services
- If this does not work, ensure the PABX is connected to the network and maybe reboot the PABX and then reboot the CCS server once the PABX is back online

13.2.5 Unable to Connect to CCS Server

Problem

CCS Desk Client or CCS Desk Manager is unable to connect to the CCS Server

Troubleshooting Steps

- Check if the server IP address setting in CCS Desk Config is correct and test if you can telnet to the IP Address
- Check server/client Firewall settings for port 9011
- Make sure CCS Desk Server service is running
- Use Task Manager to check that DeskServer.exe process is running

13.2.6 Connected to Server but the Server is not connected to PABX

Problem

Unable to login to CCS Desk Client. It is connected to the Server but the Server is not connected to the PABX

Troubleshooting Steps

- Make sure CCS Desk PBX Server service is running
- Check CCS Desk Manager - Services to ensure a PABX is selected on the CCS PABX tab
- Use Task Manager to check that only one PABXServer.exe process is running
- Try restarting the Telephony service and then CCS Desk PBX Server service on the Server
- Use Julmar Phone Dialer to see the list of extensions monitored by TAPI.

13.2.7 CCS Desk Client can't see an Incoming call or Dial out

Problem

From the CCS Desk Client the Agent is unable to see Incoming Calls and is also unable to make a call.

Troubleshooting Steps

- Try restarting the Telephony service and then CCS Desk PBX Server service on the Server
- Use Julmar Phone Dialer to test whether it can dial or see incoming calls

13.3 Announcements

13.3.1 Unable to Hear Announcements

Problem

Tom is trying to listen to the company's Announcement greetings on the handset - but is unable to hear any announcements that are being played

Troubleshooting Steps

- Make sure the configurations are correct in CCS Desk/CCS Desk Manager.
- Check the announcement files are in the correct folders for the queues
- Ensure the announcement files are in the correct format.
- Try to listen to those announcements using external media player.
- Check for data flow using WIRESHARK Capture with "RTP" filter.
- If data is sent to the handset then Check the DTMF settings are correct in PABX.

13.3.2 No Announcements Played

Problem

Announcements are not being played when calls come in

Troubleshooting Steps

- Check the CCS Desk Announcement Server Service is running
- Open Task Manager and check 1 instance of AnnounceServSvc.exe process is running
- In CCS Desk Manager – Services, check the Announcement server and folder has been specified
- Ensure that the Announcement folder exists with the correct structure
- Ensure the Greeting files are in Telephony Quality i.e. PCM 11Khz 8 bit Mono

13.4 CCS Q

13.4.1 Call Backs not coming through to Agents

Problem

Customers can Leave Callback or Web Callback, but not coming through to agents

Troubleshooting Steps

- Ensure that Campaigns are running

13.4.2 Call Back- Unable to play Recorded message

Problem

Agent is unable to play the recorded message from a callback

Troubleshooting Steps

- Ensure that agent has Read access to the folder where the messages are stored

13.4.3 Calls are not being routed

Problem

No call is being routed

Troubleshooting Steps

- Ensure that the Dial-In-Device is already pointed to the pilot extension
- Ensure the indial assignment has been properly configured
- Check the CCS Desk Announcement Server Service is running
- Open Task Manager and check 1 instance of AnnounceServSvc.exe process is running
- Ensure that TAPI is working correctly
- Restart CCS PBX Server Service and then the Windows Telephony Service

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