

Grandstream Networks, Inc.

Call Center



Today, many small and medium-sized businesses are choosing on-premises IT solutions, which will fit their special business needs. As for the telephony systems, VoIP (Voice over IP) has emerged in the last years as major technology providing all necessary features that enterprise-grade PBXs can offer.

One of the major functionalities that a VoIP system must provide is the call center features, allowing SMBs to implement their own local call center and better serve their customers by phone calls.

There are hundreds of different hardware/software providers across the globe that integrate call center functionalities into their solutions, and every call center system has its pros and cons. When selecting the right call center system for your business, contact center, or call center, it's important to decide which features you want your phone system to have.

Grandstream Networks, being the leading manufacturer of VoIP equipment, has built into its well-known UCM6XXX IP-PBX series many call center features that businesses are requesting and will continue to add more options to attend to its customers' needs. In the following guide, we will cover in detail all the major modules and features provided by the UCM6XXX IP-PBX series that will help you run your own call center in the most possible efficient way.

Note

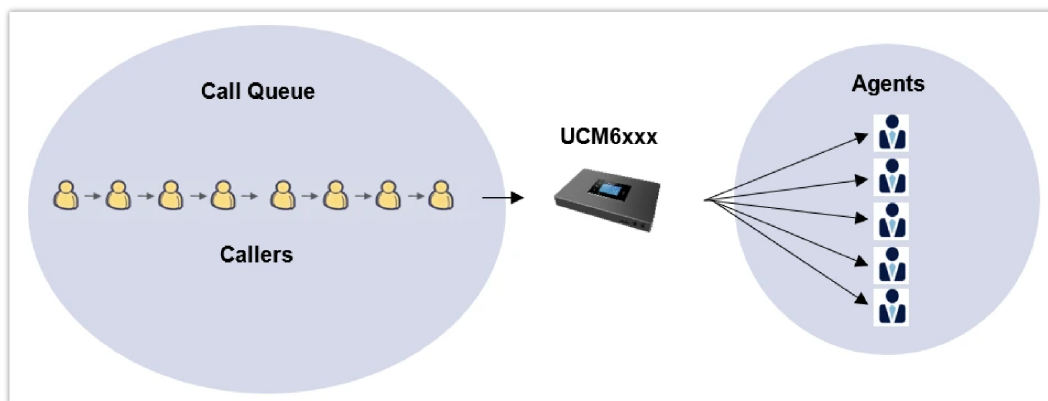
UCM6XXX series include UCM620x, UCM630x, UCM630xA and UCM6510 series.

UCM Call Center Features List

The UCM has most of the well-known features that are requested for call center implementations, the following sections will cover these modules and functionalities one by one in more detail.

Call Queues

UCM supports one of the fundamental building blocks of every call center system, which is call queues.



Call Queue Diagram

Typically, a call queue consists of:

- **Callers:** Sending incoming calls placed in the queue.
- **Agents:** Members defined to answer the queue calls. Agents can be either static or dynamic.
- **Call queue strategy:** A strategy that dictates how the PBX will distribute incoming calls to the agents.
- **Music on hold:** Music or advertisements played for callers while waiting in the queue.

Users can also set other useful features and options that we summarize in the following table:

Basic Settings

<i>General</i>	
Extension	Configure the call queue extension number.
Name	Configure the call queue name to identify the call queue.
Strategy	Select the strategy for the call queue. ● Ring All: Ring all available Agents simultaneously until one answers. ● Linear: Ring agents in the specified order. ● Least Recent: Ring the agent who has been called the least recently. ● Fewest Calls: Ring the agent with the fewest completed calls. ● Random: Ring a random agent. ● Round Robin: Ring the agents in Round Robin scheduling with memory. The default setting is “Ring All”.
Music On Hold	Select the Music On Hold class for the call queue. Note: Music On Hold classes can be managed from Web GUI > PBX Settings > Music On Hold.
Max Queue Length	Configure the maximum number of calls to be queued at once. This number does not include calls that have been connected with agents, only calls that are still in queue. When this maximum value is exceeded, the caller will hear a busy tone and be forwarded to the configured failover destination. Default value is 0 (unlimited).
Agent Rest Time (s)	Configure the amount of time in seconds after ending a call where the agent will not receive additional calls. Once this time has passed, the agent will be able to receive calls again. If set to 0, agents can receive additional calls immediately after ending a call. Default value is 10 seconds.
Retry Time (s)	Configure the number of seconds to wait before ringing the next agent. The minimum is 1 and the default setting is 5 seconds. Since only 3 digits can be entered, the max value is 999.
Agent Ring Time	Configure the number of seconds to ring an agent. The minimum is 5 and the default setting is 30 seconds. Since only 3 digits can be entered, the max value is 999.
Auto Record	If enabled, the calls on the call queue will be automatically recorded. The recording files can be accessed in Queue Recordings under Web GUI > Call Features > Call Queue. Users can choose whether to automatically record only internal calls, external calls or all calls. By default, Auto Record is disabled.
Prompt Language	Choose the language of the prompt which will be played to the caller. When the option “default” is selected, the language defined in PBX Settings > Voice Prompt > Language Settings will be selected.
<i>Welcome Prompt</i>	
Enable	Enable the welcome prompt.
Custom Prompt	Choose the initial tone that plays when the user dials the queue number. Note: The user can upload a custom prompt directly from this parameter. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw
Play Full Welcome Prompt	If enabled, queue agents will not be rung until after the welcome prompt is done playing. Otherwise, queue agents will be rung while the welcome prompt is being played to the caller.
<i>Satisfaction Survey Prompt</i>	
Custom Prompt	After a queue agent hangs up a call, a prompt will play asking the caller to rate their satisfaction on a scale of 1 to 5, with 5 being the highest. Notes: The user can upload a custom prompt directly from this parameter. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw ● The user can upload a custom prompt directly from this parameter. ● Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw ● Super administrator, administrators and queue chairmen can access agent satisfaction statistics by going to Call Queue Statistics > Overview > Agent Satisfaction Statistics/Queue Satisfaction Statistics. ● The service satisfaction information can also be downloaded from Call Queue Statistics.

<i>Max Wait Time</i>	
Max Wait Time	Configures the amount of time (in seconds) a caller will be kept in queue before the the call is automatically routed to the configured Max Wait Time Destination. If set to 0, callers will be kept in queue indefinitely. Default is 60 seconds.
Destination	The call will be routed to this destination if no one in this queue answers after the max wait time expires.
<i>Reset Agent Call Counter</i>	
Enable	Specifies the frequency at which the agent call counter will be reset. This will affect counter data used for agent ring strategies and the queue switchboard data.
Repeat	Set the repeat frequency to One-time, Daily, Weekly or Monthly.
Date/Time	Set the date and time.
<i>Destination Prompt Cycle</i>	
Enable	If enabled, the callers will hear the configured custom prompt at set intervals while waiting. If they press “1,” they are immediately routed to a predefined failover destination.
Destination Prompt Cycle	Configure the voice prompt cycle (in seconds) of this call queue. When playing the voice prompt, you can press 1 to transfer to failover destination.
Custom Prompt	When playing a custom prompt, press 1 to enter the failover destination. Otherwise, continue waiting in queue. Note: The user can upload a custom prompt directly from this parameter. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw
Destination	After the specified amount of time, the caller will be prompted to press 1 to immediately get redirected to the configured failover destination.
Advanced Settings	
<i>Virtual Queue</i>	
Enable Virtual Queue	If enabled, the system will activate a virtual queue for users, allowing them to opt for a callback instead of waiting. Callers will be prompted to either remain in the queue or choose a number that the PBX will use to reach them, ensuring they retain their position in line.
Virtual Queue Mode	● DTMF mode: pressing 2 will manually trigger virtual queue and callers will hear a prompt to manually set a callback number. ● Timeout mode: virtual queue will automatically be triggered when the configured Virtual Queue Period has passed and the users can choose a callback number. ● Auto mode: virtual queue will automatically be triggered when the configured Virtual Queue Period has passed but the callback number will automatically be set to the caller’s detected CID number.
Virtual Queue Period (s)	The amount of time in seconds that must pass before virtual queue is offered to callers when using Timeout mode or Auto mode .
Virtual Queue Outbound Prefix	System will add this prefix to dialed numbers when calling back users.
Enable Virtual Queue Position Announcement	If enabled, the system will inform callers waiting in the queue of their positions in line.
Enable Virtual Queue Wait Time Announcement	If enabled, the estimated wait time for the call to get answered will periodically be announced to the caller.
Enable Virtual Queue Callback Timeout	If enabled, agents will have a set amount of time to answer a virtual queue callback.
Write Timeout	The amount of time in seconds that agents will have to answer a virtual queue callback. If the value is less than the Agent Ring Time, then the Agent Ring Time will take effect.

Virtual Queue Welcome Prompt	Upload the file of your welcome prompt of the virtual queue. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw
<i>Queue Announcement</i>	
Enable Position Announcement	If enabled, the system will inform callers waiting in the queue of their positions in line.
Enable Wait Time Announcement	If enabled, the estimated wait time for the call to get answered will periodically be announced to the caller. Note: Wait time will not be announced if less than one minute.
Announcement Interval	The interval at which caller positions and estimated wait times will be announced. Valid range is between 20 and 600 seconds. Default value is 20.
Agent ID Announcement	If enabled, a system prompt containing the agent ID will be played to the caller when answered by an agent.
Premium Code	Callers can increase their priority in queue by entering their premium code and # within 5 seconds of the premium code prompt ending.
Premium Code Prompt	After enabling the position announcement, the premium code related functions can be set to share the same announcement cycle with the position announcement.
<i>Custom Announcement</i>	
Custom Prompt	The system will periodically play this announcement to callers that enter the queue. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw
Announcement Interval (s)	Configures the interval for playing the queue's custom announcement. Valid range is between 20 and 600 seconds. Default value is 60.
<i>Empty Queue</i>	
Leave When Empty	Configure whether the callers will be disconnected from the queue or not if the queue has no agent anymore. The default setting is "Strict". ● Yes: Callers will be disconnected from the queue if all agents are paused or invalid. ● No: Never disconnect the callers from the queue when the queue is empty. ● Strict: Callers will be disconnected from the queue if all agents are paused, invalid or unavailable.
Dial in Empty Queue	Configure whether the callers can dial into a call queue if the queue has no agent. The default setting is "No". ● Yes: Callers can always dial into a call queue. ● No: Callers cannot dial into a queue if all agents are paused or invalid. ● Strict: Callers cannot dial into a queue if the agents are paused, invalid or unavailable.
Failover Destination	Choose the destination where the call will be directed when the queue is empty or when all the agents are not logged in, here are the destinations that can be configured: ● Play Sound. ● Extension. ● Voicemail. ● Queues. ● Ring Group. ● Voicemail Group. ● IVR ● External Number.
<i>CTI</i>	
Enable Agent Login	Enabling agent login will cause the dynamic agents to be unavailable.
Queue Chairman	The queue chairman can log into his web portal to operate the queue.
<i>Service Level Agreement (SLA)</i>	

Enable SLA	Toggles Service Level Agreement (SLA), which is percentage measurement of the queue group's ability to answer incoming calls within a defined amount of time. If a queue group's calculated SLA percentage is below the configured threshold value, alerts will be generated and sent out via email to the specified recipients. Example: The SLA goal is 80% of calls (Threshold) within 20 seconds (SLA Time). If less than 80% of queue calls are answered within 20 seconds, the specified users will be notified of it.
SLA Time (s)	Configures the amount of time in seconds that agents must answer incoming queue calls within to satisfy service quality requirements. Answering calls past this time will negatively affect the SLA measurement, and an alert will be generated once it hits below the specified SLA alert threshold. Supported values are 1 to 180. Default value is 20.
SLA Alert Email Notification	Enable SLA alert email notification.
Alert Threshold (%)	Configures the SLA alert threshold. If the percentage of queue calls answered within the configured SLA Time go below this value, an alert email will be generated and sent to the configured recipients. Supported values are 1 to 100. Default value is 80.
SLA Alert Interval (m)	Configures the minimum amount of time (in minutes) between alert sending. If a new alert is generated within this period, it will not be sent to recipients until the next alert interval. The valid range is from 1 to 120. The default value is 120.
SLA Alert Email Template	The template of the SLA alert email notifications.
Alert Email Recipients	Send SLA alert notifications to the configured alert email recipients. If a recipient does not have an email address configured, they will not receive the alert notifications.
Other Settings	
Report Hold Time	If enabled, the PBX will report (to the agent) the duration of time of the call before the caller is connected to the agent. The default setting is "No".
Replace Display Name	If enabled, the PBX will replace the caller display name with the Call Queue name so that the caller knows the call is incoming from a Call Queue.
Enable Feature Codes	Enable feature codes option for call queue. For example, *83 is used for "Agent Pause"
Autofill	Enable/Disable the Autofill feature which distributes calls automatically to available agents as soon as they become free instead of having callers wait in a traditional queue.
Dynamic Login Password	If enabled, the configured PIN number is required for dynamic agent to log in. The default setting is disabled.
Alert-Info	When present in an INVITE request, the Alert-info header field specifies an alternative ring tone to the UAS.
Call Memory	If enabled, the system will remember the last agent a caller has talked to. If the caller enters the queue again within the configured Retrieval Time (Days), the remembered agent will be prioritized for answering the call.
Memory Retention Time (Days)	Sets the amount of time that callers will be remembered for Call Memory agent matching. Calls to the queue after this period of time will no longer prioritize the caller's last agent. Valid range is 1 to 30 days. Default value is 7.
Enable RPID Header	Toggles the sending of Remote-Party-ID header to the caller. Requires enable Send Remote Party ID configuration in ToS page.
Agents	
Static Agents	Go to "Agents" Tab and Select the available users to be the static agents in the call queue. Choose from the available users on the left to the static agents list on the right. Click on ◀ or ▶ to choose. And use UP and Down arrow to select the order of the agent within the call queue.

◦ Call Queue Configuration

Below are the steps for the basic creation and configuration of call queues from the UCM's web GUI:

1. Access the UCM web GUI under **Basic Call Features→Call Queue**.
2. Click on “Add” to create a new call queue.
3. Specify the call queue extension number under **Extension** field.
4. Define a name for this call queue.
5. Configure the call queue strategy under **Strategy**.
6. Go to “Agents” tab to select available agents to receive calls.
7. Press **Save** button and **apply** the new changes.

For Agents’ configuration and management, please check **[Agents Management]** for more details.

Virtual Queue

A new function named Virtual Call Queue has been added to the UCM’s call queue module, this allows customers to receive a callback instead of waiting in an ACD queue.

After a customer’s waiting time exceeds a configurable threshold, he/she will be prompted to choose between stay waiting on the queue or leave a call-back number without losing his position in the queue. When it’s his turn, the UCM will place automatically a call to the call-back number.

This feature can be enabled and configured under the advanced settings of each call queue.

Enable Virtual Queue	If enabled, the system will activate a virtual queue for users, allowing them to opt for a callback instead of waiting. Callers will be prompted to either remain in the queue or choose a number that the UCM will use to reach them, ensuring they retain their position in line.
Virtual Queue Period	Configure the time in (s) after which the virtual queue will take effect and the menu will be presented to the caller to choose an option when using Timeout mode or Auto mode . Default is 20s.
Virtual Queue Mode	Offered to caller after timeout: After the virtual queue period passes, the caller will enter the virtual call queue and be presented with a menu to choose an option, the choices are summarized below: ● Press * to set current number as a callback number. ● Press 0 to set a callback number different than the current caller number. ● Press # to keep waiting on the call queue. Triggered on user request: In this mode, the callers can activate the virtual queue by pressing 2, then they will be presented with the menu to choose an option as below: ● Press * to set current number as callback number ● Press 0 to set a callback number different than current caller number. ● Press # to keep waiting on the call queue.
Virtual Queue Outbound Prefix	System will add this prefix to dialed numbers when calling back users.
Enable Virtual Queue Callback Timeout	When this option is enabled and after a caller registers a call back request on the virtual queue. While all the agents are busy, the UCM will call an agent once he/she is idle again, this timeout is used for how long the UCM continues calling the agent and if they don’t answer the call then the callback request will timeout and expire.
Write Timeout	The amount of time in seconds that agents will have to answer a virtual queue callback. If the value is less than the Agent Ring Time, then the Agent Ring Time will take effect. Valid range is between 1 and 120. Default value is 60.
Enable Virtual Queue Position Announcement	Enable the announcement of the caller’s position periodically. Note: Queue position will now be announced to the caller upon entering the queue.
Announcement Interval (s)	The interval at which caller positions and estimated wait times will be announced. Valid range is between

	20 and 600 seconds. Default value is 20.
Enable Virtual Queue Wait Time Announcement	When enabled the UCM will announce the estimated queue wait time to callers if the estimated wait time is longer than 1 minute.
Queue Chairman	Select the extension to act as chairman of the queue (monitoring)
Virtual Queue Welcome Prompt	Click on “Upload Audio File” to upload the VQ welcome prompt. Only the following file formats are supported: .tar, .tgz, .tar.gz, .mp3, .wav, .gsm, .alaw, .ulaw
Enable Agent Login	When enabled, static agents can conveniently log in and out of a queue by configuring a programmable softkey key on their phones as a shortcut. Notes: ■ This feature is currently available only for GXP21xx and GRP26xx phones. ■ The softkey can be disabled under “Account□SIP Settings□Advanced Features□Special Feature” to “UCM Call Center”. A softkey labeled “UCM-CC” will appear on the bottom of the phone’s screen. ■ When this option is enabled, dynamic agent login will be no longer supported. In the case of concurrent registrations, changing agent status on one phone (login/logout) will be reflected on all phones.

Position Announcement

UCM supports also call queue position announcement, where the caller’s position in the queue will be announced upon entering the queue.

This can help the callers to decide whether to wait for more for an agent to answer the call or leave a callback request or simply hangup.

Virtual Queue & Position Announcement configuration

In order to set virtual call queue and position announcement features under a specific call queue, users may follow the steps below:

1. Access the UCM web GUI under **Basic Call Features→Call Queue**.
2. Edit the call queue and go to advanced settings.
3. Check “Enable Virtual Queue” and set the mode set to be offered to the caller.
4. Set the “Virtual Queue period” (ex: 30s).
5. Set Virtual Queue Outbound prefix that will be used for outbound rule matching.
6. Enable Position Announcement.
7. Set the Announcement Interval (ex: 30s).
8. Enable Wait Time Announcement (Optional to announce the estimated queue wait time to callers if the estimated wait time is longer than 1 minute)
9. **Save** and **apply**.

Music On Hold

UCM supports also Music on hold, which is largely used on call center systems. Once a call reaches the queue, the customer will be usually prompted with an IVR menu and listen to music on hold while waiting for an agent to take the call.

The music on hold files are managed under **PBX Settings→Music On Hold** and once this is done, users can assign to each call queue a specific music on hold as desired.

Agents Management

Call center agents which handle incoming queue calls and outgoing calls with customers on a daily basis can be defined in two different ways, static agents and dynamic agent, the following sections explain each type of agents.

The following table shows the number of agents supported on each UCM6XXX Series models.

UCM Model	Maximum Number of Agents in Call Queue				
UCM630X					
UCM6301	25				
UCM6302	50				
UCM6304	80				
UCM6308	160				
UCM630XA					
UCM6300A	25				
UCM6302A	50				
UCM6304A	80				
UCM6308A	160				
GCC IP-PBX					
GCC6010	12 <i>(Standard Package)</i>			25 <i>(with PBX Upgrades)</i>	
GCC6011	12 <i>(Standard Package)</i>			25 <i>(with PBX Upgrades)</i>	
GCC6010W	12 <i>(Standard Package)</i>			25 <i>(with PBX Upgrades)</i>	
GCC6020	50				
GCC6021	50				
SoftwareUCM					
SoftwareUCM	25 <i>(Plans with extensions ≤ 500)</i>	50 <i>(Plans with extensions ≤ 1000)</i>	80 <i>(Plans with extensions ≤ 2000)</i>	160 <i>(Plans with extensions ≤ 3000)</i>	200 <i>(Plans with extensions ≤ 5000)</i>
CloudUCM					
CloudUCM	= Number of Extenions <i>(Plans with extensions ≤ 100)</i>			100 <i>(Plans with extensions ≥ 100)</i>	

Important

Adding an agent to more than one queue will count towards the number of agents supported. E.g., adding an agent to 2 more queues will be counted as 2 additional agents, which will be deduced from the overall number of supported agents. This includes static and dynamic agents.

Static Agents

The administrator can assign static agents to a call queue using the following steps.

1. Access the web GUI menu **Basic Call Features→Call Queue→Edit Queue**.
2. Click on **Agents** tab.
3. Select the static members (agents) of the queue.

Dynamic Agents

The second method by which agents can be used is to give them the flexibility to dynamically login and log out from the call queue, this way the agent will log in once arrived at the office and log out when leaving.

For this, the administrator needs to configure the login code by following below steps:

1. Access the web GUI menu **Basic Call Features→Call Queue→Global Queue Settings→Dynamic Agent Login Settings**.
2. Set the login/logout Code Suffix (Ex: * for login and ** for logout).
3. **Save** and **Apply**.

Once this is done, the administrator can instruct the agents that they can use the queue extension number followed by the corresponding code suffix in order to log in/out respecting working hours.

The maximum number of agents for a queue depends on the UCM model as shown below:

Agents Pause

When an agent needs to take a break (for lunch as an example) they can simply follow the steps below:

1. Dial the configured "agent pause" feature code. (*83 by default).
2. Enter a key that corresponds to the Pause reason. (See table below for default settings)
3. Unpause at any time by dialing the "agent Unpause" feature code. (*84 by default)

Notes:

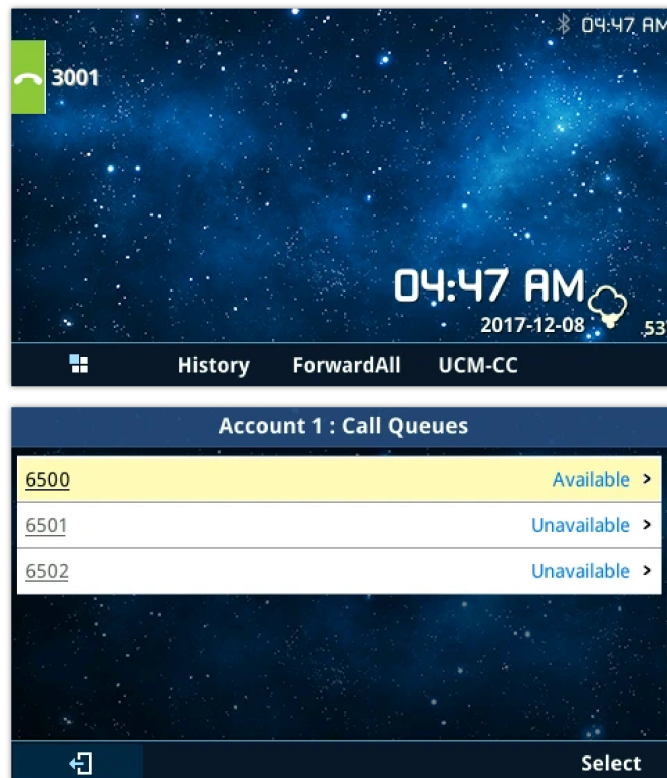
- The feature codes can be configured under **Basic Call Features→Feature Codes→Feature Codes**
- The Agent Pause Reason Settings can be set to default or custom by accessing **Basic Call Features→Call Queue→Global Queue Settings→Agent Pause Reason**. Users can configure up to 10 agent pause reasons along with their respective voice prompts.

The default Agent Pause Reason Settings are as follow:

Key	Agent Pause Reason
1	Lunchtime
2	Hourly Break
3	Backoffice
4	Send Email
5	Wrap

Agent Easy Login

This feature enables the static agents to easily login/logout from their call queues using a simple button press to either login or log out. From their phone they can see the list of call queue that they are members in, and once they are in office, they can choose to which call queues to login and after the end of the day they can press a button again to logout, thus removing the pain to remember the dynamic login/logout code and the queue extension number.



UCM CC Feature on GXP21XX phones

Notes:

- This feature is only compatible with GXP21XX and GRP26XX phones on the latest firmware versions.
- Once this option is enabled, dynamic agent login will be disabled.

Incoming Calls Distribution

UCM supports automatic call distribution with many different strategies that can be set under the basic options of each call queue separately.

Below are the descriptions of each strategy implementation:

- **Ring All**

Ring all available agents simultaneously until one of them answers the call.

- **Linear**

The calls will ring at agents' phones following an order previously configured. Only for static agents.

- **Least Recent**

The system selects the agents who have not answered the phone for the longest period.

- **Fewest Calls**

The system assigns the call to the agent with the lowest number of calls answered so far.

- **Random**

Ring a random agent.

- **Round Robin**

Ring the agents in Round Robin scheduling with memory. Agents will receive calls in a rotating order while keeping track of the last agent who received a call.

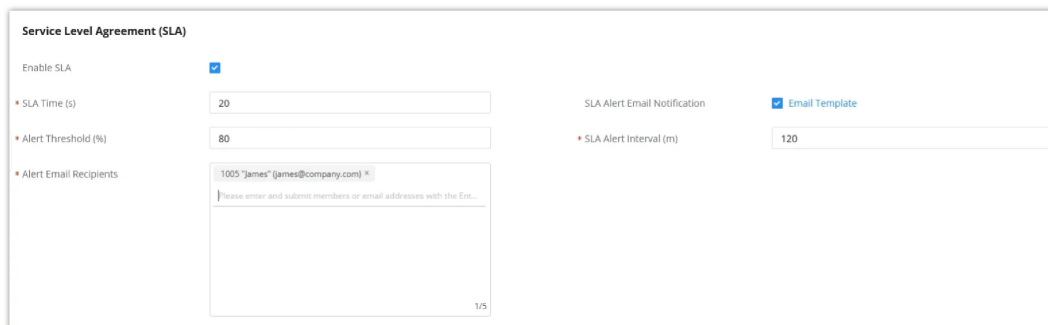
Note:

Besides the above strategies, the users can also enable “**Call Memory**” (under **Basic Call Features→Call Queue→Edit Queue→Advanced Settings**) which refers to the system’s ability to remember and prioritize the last agent a caller has talked to within a configured time interval called “**Memory Retention Time**”.

Service Level Agreement

Service Level Agreement allows monitoring of the quality of the service provided to the customers. The quality of the service is defined by answering the received calls within a time period to make sure that there are enough agents in the queue.

To be able to configure Service Level Agreement, please navigate to **Basic Call Features→Call Queue**, edit/create a queue, then under **Advanced Settings** you will find “Enable SLA”, tick that option to have the related configuration displayed.



The screenshot shows the 'Service Level Agreement (SLA)' configuration form. It includes the following fields and options:

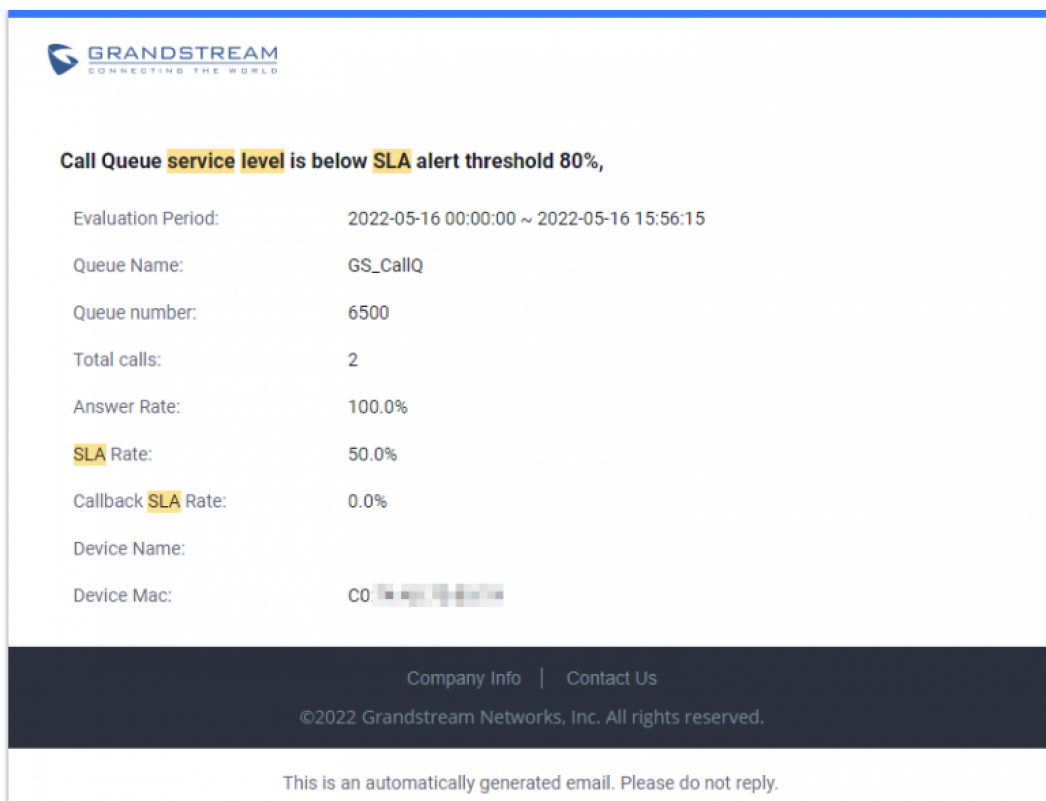
- Enable SLA:** A checkbox that is checked.
- SLA Time (s):** A text input field containing the value '20'.
- Alert Threshold (%):** A text input field containing the value '80'.
- Alert Email Recipients:** A text area containing the email address '1005 "James" (james@company.com) *'. Below the text area is a placeholder text: 'Please enter and submit members or email addresses with the Ent...'. A '1/5' indicator is at the bottom right of the text area.
- SLA Alert Email Notification:** A checkbox that is checked, with a link to 'Email Template' next to it.
- SLA Alert interval (m):** A text input field containing the value '120'.

Enabling SLA

- **SLA Time (s):** The SLA Time is the amount of time in which a call should be picked up by an agent in the call queue, to assure a quick response time to the number of calls received. Thus, offering a better service to the clients.
- **SLA Alert Email Notification:** Enable this option to receive an email triggered by exceeding the SLA time.
- **Alert Threshold:** The minimum percentage of the calls answered within the SLA time. Once this threshold is exceeded the email notification will be triggered.
- **SLA Alert Interval (m):** The minimum time period between two SLA email alerts.
- **SLA Email Recipients:** The list of emails to which the alert will be sent.

Once the threshold of calls is not answered within the configured time, an email alert will be automatically sent.

The alert email will look like the figure below.



SLA Alert Email

Call Control

Agents have full control over the calls with the support of almost all known features that are needed within a call center system for day to day operations, these features set include the following:

- Putting calls on Hold.
- Call transfer
- 3-way conference
- Call park

To use these features, the users have two options.

Using Standard Feature Keys or Codes on the Phones

For example, the agent can use the "Transfer" button on his phone in order to transfer calls or use the UCM's corresponding feature code for call hold in order to put a call on hold.

Note

For this first option, make sure to Enable Feature Codes under Call Queue Advanced settings.

Using Queue Switchboard

The Agent can access his/her user portal under call queue CTI where they can see active calls and have option buttons to operate and control the call, more details will be provided later on this document.

Monitoring

UCM supports some of the interesting monitoring features that are usually used within call center systems by supervisors and coaching personnel to assist agents during critical situations. These features can be used either via specific features codes or using CTI interface.

Call Barging

With call barging, supervisors can use feature codes after enabling the Spy option under **Basic Call Features→Feature Codes** page to do the following operations:

- **Listen**

In "Listen" mode, the extension monitoring the call can hear both parties in the active call but the audio of the user on this extension will not be heard by either party in the monitored active call.

- **Whisper**

In "Whisper" mode, the extension monitoring the call can hear both parties in the active call. The user on this extension can only talk to the selected monitored extension and he/she will not be heard by the other party in the active call. This can be usually used to supervise calls.

- **Barge**

In "Barge" mode, the extension monitoring the call can talk to both parties in the active call. The call will be established similar to the three-way conference.

Same operations can be performed using the web GUI of the UCM from the call status page and switchboard.

Whisper Coaching

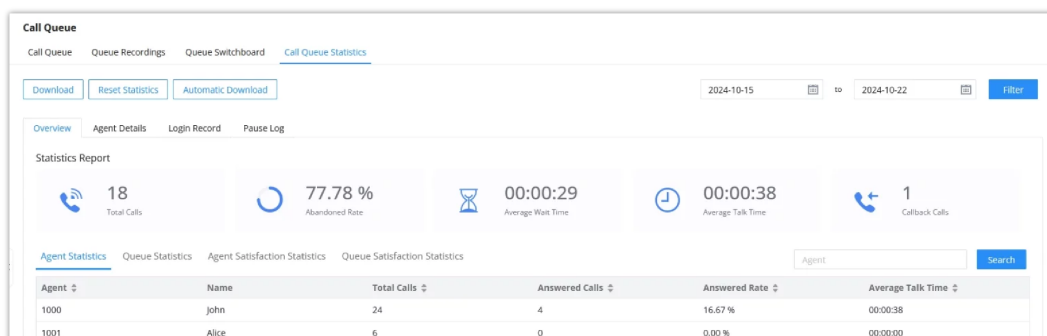
As mentioned above, one of the three modes for call barging in UCM is the **Whisper** mode. This mode allows supervisors and coaching personnel to assist agents during critical situations which require intervention. Whenever the agent answers a call, the call conversation audio will be forwarded to the supervisor, and the supervisor's audio will be forwarded to the agent for instructions but not to the customer.

Call Queue Statistics

UCM has also built-in call queue statistics for performance measurement and agent evaluation, thus helping managers and supervisors making the right decision to improve the call center day to day operations.

The call queue statistics provided by the UCM have some amazing filtering options which can be used to get every detailed information about the performance of each queue separately or the full system.

The following figure shows a sample of statistics that lists the average unanswered and abandoned calls, as well as the average call and waiting time.



Call Queue Statistics Page

This section will describe in details the information that can be found on the **Basic Call Features→Call Queue→Call Queue Statistics** page.

Overview

This tab shows the agent statistics report, which includes an overall report of all queues along with the following more specific information:

- Total calls, answered calls/rate and the average talk time for each agent.
- Total Calls, answered calls/rate, abandoned calls/rate, transfer out calls/rate, average wait time, average talk time, callback calls and SLA callback for each queue that includes agents.
- Agent satisfaction statistics by agent which includes the number of calls not surveyed and not evaluated as well as the score sorted by levels.
- Queue satisfaction statistics that show the same information as agent satisfaction statistics but for the overall queue.

Agent Details

Users can find details specific to agents such as:

- Agent extension, name and queue.
- Time of the call and whether or not it was abandoned.
- The Caller ID number, wait time and talk time.
- The service satisfaction feedback.

Login Record

Using this tab, supervisors can have visibility on the login time/duration and the logout time for each agent as well as their respective queue.

Pause Log

This report is used to keep track of pause time, duration, reason and resume time for each agent. This can be helpful for supervisor to verify if the agents are adhering to their schedules.

Call Queue Statistics Download

Users can click on the download button [Download](#) to download all the call queue statistics in one csv file.

Users can also configure the call queues statistics to be sent automatically to the configured email address at a specified frequency and time by clicking on the automatic download button [Automatic Download](#) to access to the following configuration settings:

Call Queue > Automatic Download

Automatically send call queue statistics to the configured email address at the specified frequency and time.

Automatic Download

☒

Report Type

☐ All
 ☐ Overview
 ☒ Agent Details
 ☒ Login Record
 ☒ Pause Log

Automatic Download Period

By Week

Mon

23

Email

james@company.com

Email Template

Cancel

Save

Call Queue Statistics Automatic Download

Option	Description
Automatic Download	Enables the call queue statistics automatic download.

Report Type	Specifies the type of records to download: All, Overview, Agent details, Login Record, Pause Log.
Automatic Download Period	Specifies the automatic download period. The default option is “By Day”. At the specific time of each day, week or month, the last cycle of new records will be sent to the user.
Email	Configures the email address to receive the call queue statistics. Note: Multiple email addresses are supported and need to be separated with semicolons as follows: “xxx;xxx”.

Call Queue Automatic Download

Supervisor configuration

To setup and give special permissions for monitoring and control to the supervisor account, the following steps can be followed:

1. Access the UCM web GUI under **Extension/Trunk→Extensions** and edit the agent’s extension.
2. Go to features Tab and under “**Monitor Privilege Control**” select the extension of the supervisor.
3. Press **Save** and go under **Call features→Feature Codes** then “Enable Spy”.
4. Go under **Basic Call Features→Call Queue→Advanced settings** and select the supervisor’s extension under Queue Chairman option, this will give the supervisor control through the switchboard.
5. **Save** and **apply** the changes.

CTI (Computer Telephony Integration)

CTI, or Computer Telephony Integration refers to any technology or solution that allows the interaction between the telephone and the computer networks. This functionality is an important building block of any call center solution since it gives agents much more flexibility on handling a high volume of calls in the most efficient way, allowing them to perform most call control operations in just a few clicks.

Grandstream proposes two CTI solutions that are designed to ease the workload of your agents, the first one (GS Affinity App) requires integration with our enterprise grand IP-Phones and the second option is a web-based switchboard.

GS Affinity

Grandstream Affinity is an easy-to-use CTI application allowing interaction with Grandstream **GXP17xx/GXP21xx/GRP260x/GRP261x** IP Phones series. GS Affinity provides a smooth call management and control interaction between phones and computers running the application. Using GS Affinity CTI application, users will be able to get benefits from the following major features:

- Complete call control (call answer, call hold, DND, call forward, conference, call transfer etc....).
- Incoming calls notifications on desk computer allowing caller numbers to be screened against a database to collect or provide more information related to caller.
- Initiate outbound calls from computer directly.
- Discovering phones with CTI feature enabled and communicate with the UCM6xxx directly to execute specific actions.
- Contacts management from computer and synchronization with connected hosts.
- Manage call history of connected hosts from computer.

Click [here](#) for more information about GS affinity.

The second way Grandstream provides CTI solution is the web-based switchboard under call queue, following section will give more details about this option.

Switchboard

UCM has a simple and easy to use switchboard for real-time monitoring of call queues and performing different operations which include:

- Listing the waiting calls and proceeding calls.
- Manipulating proceeding calls.
- Showing agent's status.
- Manually logging in or out agents.

Users can access to call queue switchboard via two different methods:

User Portal

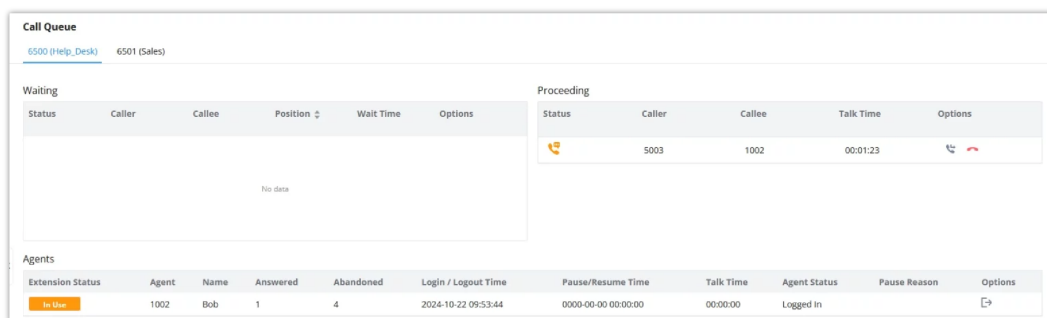
Users could log into their web GUI portal using the extension number and user password.

When an extension is created in the UCM6XXX, the corresponding user account for the extension is automatically created. The user portal allows access to a variety of features which include user information, extension configuration, and CDR as well as settings and managing value-added features like Fax Sending, Call Queue, Wake-up Service, and CRM.

Note:

SIP Password can no longer be used for login. To login to user portal, please make sure to enter user password.

Each agent can log into his/her user portal account and access the switchboard of the call queue(s) where he belongs, below figure is an example:



The screenshot displays the 'Call Queue' user portal interface. It features three main sections: 'Waiting', 'Proceeding', and 'Agents'. The 'Waiting' section shows a table with columns for Status, Caller, Callee, Position, Wait Time, and Options, but it is currently empty with a 'No data' message. The 'Proceeding' section shows a table with columns for Status, Caller, Callee, Talk Time, and Options, containing one active call record. The 'Agents' section shows a table with columns for Extension Status, Agent, Name, Answered, Abandoned, Login / Logout Time, Pause/Resume Time, Talk Time, Agent Status, Pause Reason, and Options, listing one agent named Bob.

Call Queue										
6500 (Help_Desk) 6501 (Sales)										
Waiting										
Status	Caller	Callee	Position	Wait Time	Options					
No data										
Proceeding										
Status	Caller	Callee	Talk Time	Options						
	5003	1002	00:01:23							
Agents										
Extension Status	Agent	Name	Answered	Abandoned	Login / Logout Time	Pause/Resume Time	Talk Time	Agent Status	Pause Reason	Options
	1002	Bob	1	4	2024-10-22 09:53:44	0000-00-00 00:00:00	00:00:00	Logged In		

User Portal Switchboard

From the command button on the proceeding call, the agent has the ability to transfer the call or Hangup using a simple click.

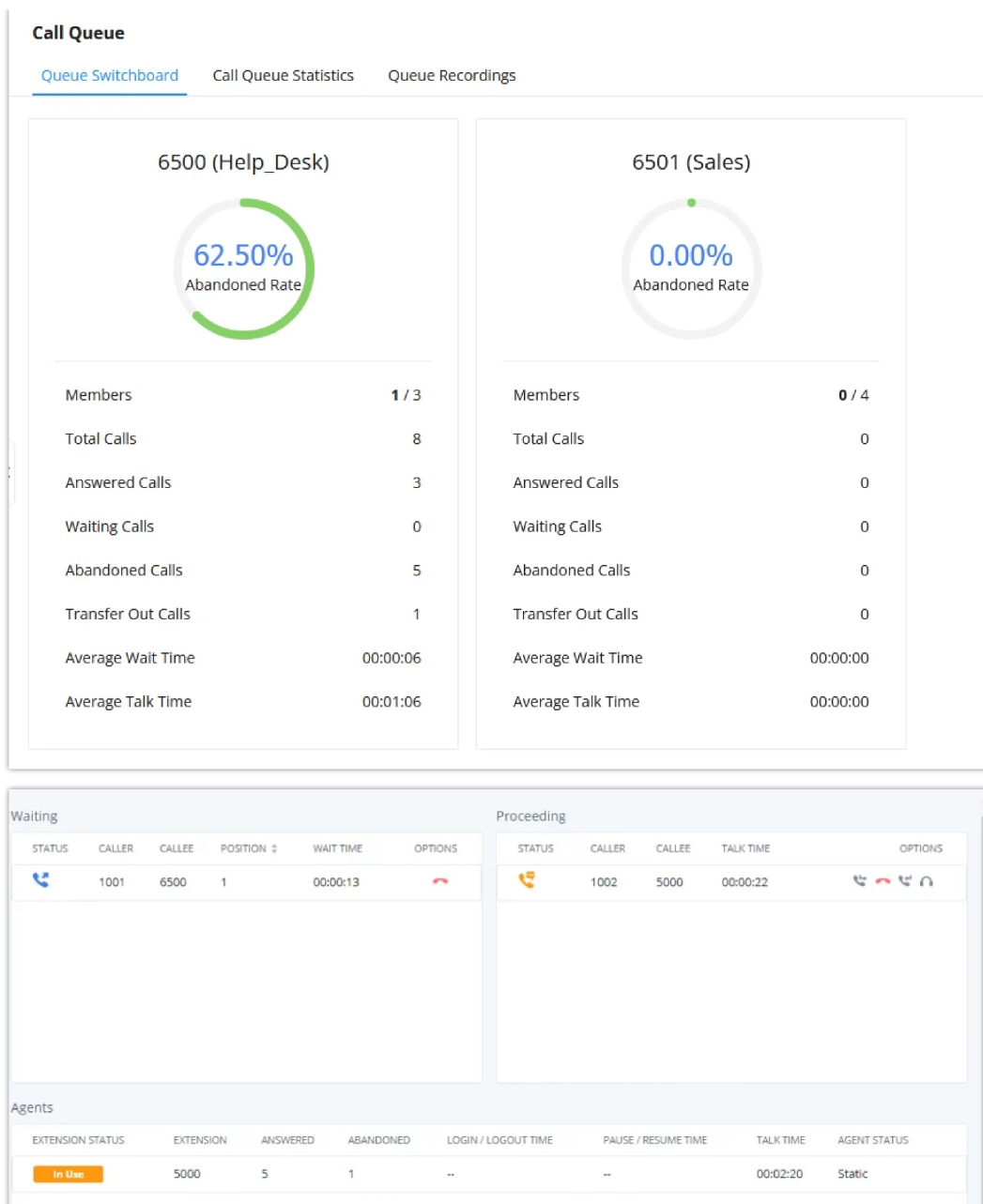
Queue Chairman

Another way to access to switchboard is to design under the advanced settings of the call queue a "queue chairman" which will provide a CTI interface for supervisors while logging in using their user portal.

From the switchboard, the queue chairman has more advanced features and control over the call queue, which include the following:

- List the waiting calls with the ability to hang-up.
- List the proceeding calls.
- Transfer proceeding calls.
- Hang-up calls.
- Call barging (see **Whisper Coaching**).
- Call insert (for 3-way conference).
- List the agent's status which are members of the call queue.
- Get some basic statistics over the call queue.

You can see from the below figure a sample switchboard of a call queue chairman or "supervisor" and which obviously has more advanced control over the call queue than the normal agent user portal access as discussed in the previous section.



Switchboard from Chairman Account

Note

The administrator account has also full access to all operation on switchboard for all queues using the web GUI admin account. It can be accessed from the menu **Basic Call Features→Call Queues→Edit→Switchboard**.

CRM

Customer relationship management (CRM) is a term that refers to practices, strategies, and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The UCM supports CRM API for well-known CRM solutions such as SugarCRM and Salesforce, this allows users to look for contact information in the Contacts, Leads, and/or Accounts tables, shows the contact record on the CRM page, and saves the call information in the contact's history.

CRM Interaction gets more interesting as well if we consider the integration with CTI app developed by Grandstream [**GS Affinity**]. Where the agents will get contact, information displayed on their screen and get a link to go directly to the contact's CRM page, allowing them to handle the call in a more customized way and give the client a better experience.

Click on [this link](#) for more information about CRM integration with UCM.

- **CRM Configuration**

To set up a connection between UCM and CRM, please follow below steps:

1. Access the UCM web GUI under **Integrations→CRM**.
2. Choose the CRM desired from the CRM System drop-down list.
3. Set CRM server address (ex: 192.168.1.3).
4. Set "Add Unknown Number" to Contacts.
5. Select from which tables to do the lookup. (contacts, accounts and leads).
6. **Save** and **Apply**.

After this, each agent should log into his/her user portal to enable CRM connection and login via their credentials. Steps should be as following:

1. Access the UCM user portal and navigate to **Other Features→CRM**.
2. Enter connection credentials Username and Access Key.
3. **Save** and **Apply** and confirm login status.

IVR and Call Recordings

IVR

The UCM has support for a full built-in IVR (auto-attendant) module which is required by every call center telephony system. Users could create up to a 5-level IVR system to customize callers' experience with key-pressing events to be directed to the right customer service (sales, marketing, tech support ...)

All IVR settings are centralized and can be managed under the menu **Basic Call Features→IVR**.

Users could achieve the following:

- Record custom prompts for the auto-attendant.
- Enable key-pressing events to guide callers through the IVR system.
- Set multi-layer IVR (up to 5-layer).
- Choose the language and customize system prompts.
- Setup blacklist/whitelist filtering.

Key Pressing Configuration

Users could follow the below steps in order to set up key pressing events for IVR cascading:

1. Access the UCM web GUI under **Basic Call Features→IVR** then edit the main IVR.
2. Navigate to the Key Pressing Events tab.
3. Select a key, then select one of the available destinations (You can select another IVR to set multi-layer IVR).

Call Recording

Another feature that is considered major for any call center system, is call recording. The UCM has support for call recording either to be enabled automatically on the call queue settings or via feature codes during the active calls.

The admin can enable auto-recording under each call queue to keep track of call records under the system for later agent monitoring, assessment, and verification usage.

Once the auto-record feature has been enabled on a call queue, the system will start recording all calls that are received on the specific queue in wav files which can be accessed from the following path:

Basic Call Features→Call Queue→Queue Recordings.

Then the user can:

- Download batch or single files to listen to the recording.
- Delete batch or single files to free recording space.
- See the caller number, the queue that has received the call.
- See the timestamp which indicates the date and time of the call.

After we have presented the call center features that are supported on the UCM, we will move on to the next part of this document to cover a sample scenario and step-by-step configuration of these features from the web GUI.

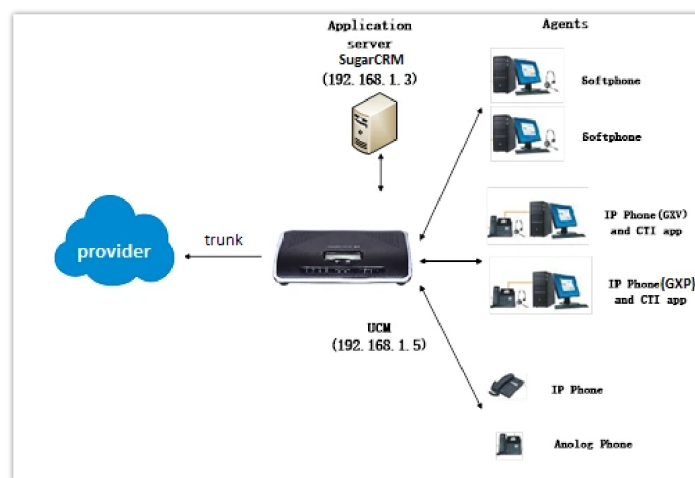
Typical Configurations of UCM Call Center and CRM Solution

Centralized Mode

Scenario Overview

The company ABC has different departments (Sales, Marketing, Support...) and needs to manage incoming calls per department. In this scenario, we will assume the following:

- Inbound route is configured to redirect all the incoming calls to a main IVR and caller needs to specify which department to reach by pressing corresponding key (We assume IVR already created).
- Sales department has 5 members with extensions: 1000, 1001, 1002, 1003, 1004.
- Incoming calls to Sales department should ring all Sales agents.
- Marketing department has 3 members with extensions: 1005, 1006, 1007.
- Incoming calls to Marketing department should ring in order.
- Support department has 10 members with extensions: 1008, 1009, 1010, 1011, 1012, 1013, 1014, 1015, 1016, 1017.
- Agents 1015, 1016 and 1017 are dynamic agents which log in and logout depending on their availability.
- UCM has integration with company CRM sever (SugarCRM).
- A supervisor is responsible to monitor and assist the tech support agents: extension 2000.
- Only the supervisor has permission for call barging on all agents calls.
- Callers to tech support should be allowed to know their position in the waiting queue and prompted on an interval of 30 seconds if they wish to stay waiting or leave a callback number to get connected once an agent is free.
- All extensions are already created, configured and registered to the corresponding end points.



Call Center Network Architecture

Configuration Steps

In order to implement the described scenario, users can follow the below procedures:

1. Create three call queues named sales, marketing and support and make sure to set the correct ring strategy. → **[Call Queue Configuration]**

The following table summarizes required settings for each queue respecting the requirements.

Call Queue Extension	Call Queue Name	Strategy	Static agents
6500	Sales_queue	Ring All	1000, 1001, 1002, 1003, 1004
6501	Marketing_queue	Linear	1006, 1005, 1007
6502	Support_queue	Round Robin	1008, 1009, 1010, 1011, 1012, 1013, 1014

Call Queue Basic Settings

2. Create the main IVR and set the key pressing events as below → **[Key Pressing Configuration]**

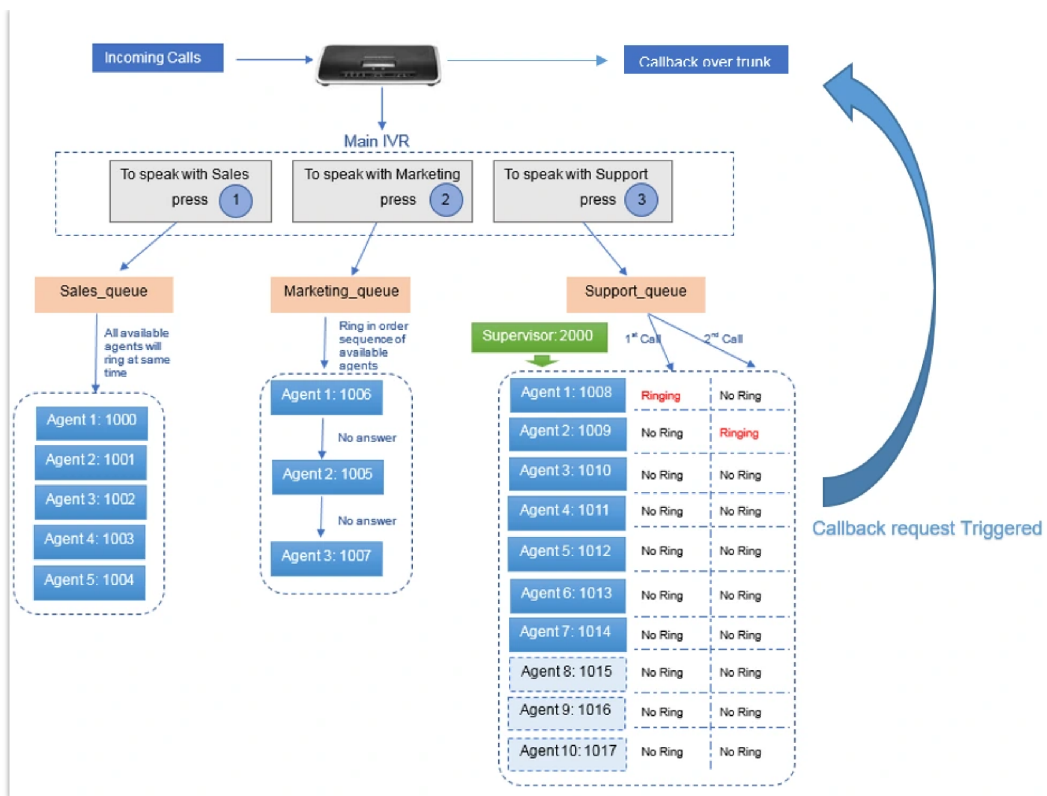
The screenshot displays the 'IVR > Create New IVR' configuration page, specifically the 'Key Pressing Events' tab. It shows three key events configured as follows:

- Key Event 0:** Key is '0', Destination is 'Queues' (Sales), Time Condition is 'All Time'.
- Key Event 1:** Key is '1', Destination is 'Queues' (Marketing), Time Condition is 'All Time'.
- Key Event 2:** Key is '2', Destination is 'Queues' (Support), Time Condition is 'All Time'.

Key Pressing Events Configuration

3. Enable dynamic agent login for tech support personal 1015, 1016 and 1017 → **[Dynamic Agents]**
4. Configure extension 2000 as the queue chairman → **[Supervisor configuration]**
5. Configure the virtual queue and enable position announcement on each queue → **[Virtual Queue & Position Announcement configuration]**
6. Setup outbound rule for client's callback feature, as followed:
 - Access the UCM web GUI under **Extension/Trunk→Outbound Routes**.
 - Add new outbound rule and name it (you can name it for ex: call center callback).
 - Set pattern as **_0X.** assuming 0 was the prefix configured on call queue advanced settings.
 - Set Strip to **1** digit. This to remove the prefix from the number that the customer left.
 - Select through which trunk you want to callback the customers.
 - **Save and Apply.**
6. Setup UCM to SugarCRM connection → **[CRM Configuration]**

The following figure shows company ABC call queue flow:



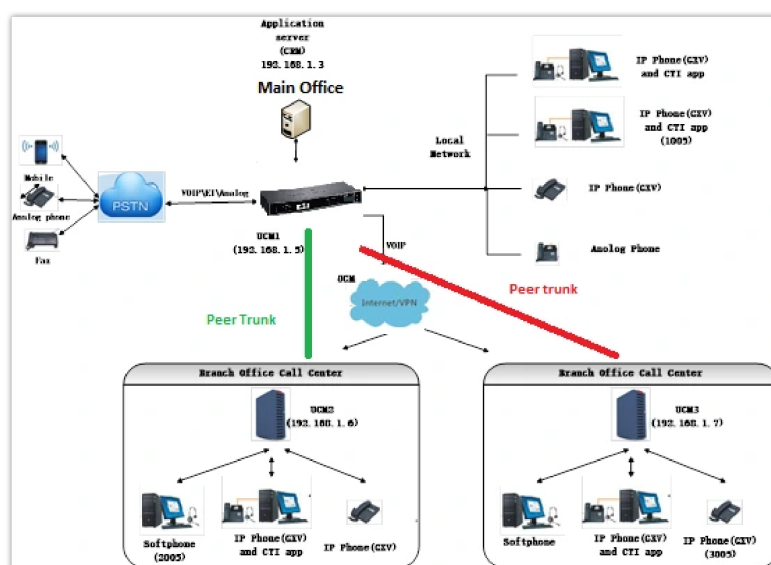
Call Queue flow example

Distributed Call center mode

Scenario overview

Company ABC has been successful and expanded its existence with two additional branch offices for customer technical support, in this case, the headquarter office UCM still maintain centralized CRM integration services and call distribution to branch offices where each UCM runs its own branch sub-call center for technical support.

Once an incoming call reaches the main UCM, users will be asked to select from which region they are calling to be directed to the correct technical support office. The following figure shows the new distributed call center architecture of the enterprise.



Distributed Call Center

Configuration steps

Following steps can be followed in order to meet the new company requirements:

1. Make sure that UCM for Branch 1 and 2 have separate extension range than headquarters UCM.

- Headquarter UCM extension range: **1XXX**
- Branch1 UCM extension range: **2XXX**
- Branch2 UCM extension range: **3XXX**

2. Configure peer trunk between headquarter and branch offices for site to site connectivity, please follow this <https://documentation.grandstream.com/knowledge-base/sip-trunks-guide/> in order to setup the trunk.
3. Edit the main IVR to add new options for regional office redirection under key pressing events. → **[Key Pressing Configuration]**

Note

Note: You can add local IVR for each branch office in order to set customized regional prompts.

4. Create call queues for each branch office where you put the corresponding agents extensions. And choose the adequate ring strategy (i.e. Ring All). → **[Call Queue Configuration]**
5. Setup virtual queue and position announcement on each queue → **[Virtual Queue & Position Announcement configuration]**
6. Configure the outbound routes on each branch office in order to route callback calls through the SIP peer trunk to the main UCM which will reroute over

Note

The number from branch UCM should stay with the callback prefix so that when it reaches the main UCM, it can match the outbound rule that routes call back requests.