Supervisor

The supervisor screen provides the necessary tools to manage the entire operation.

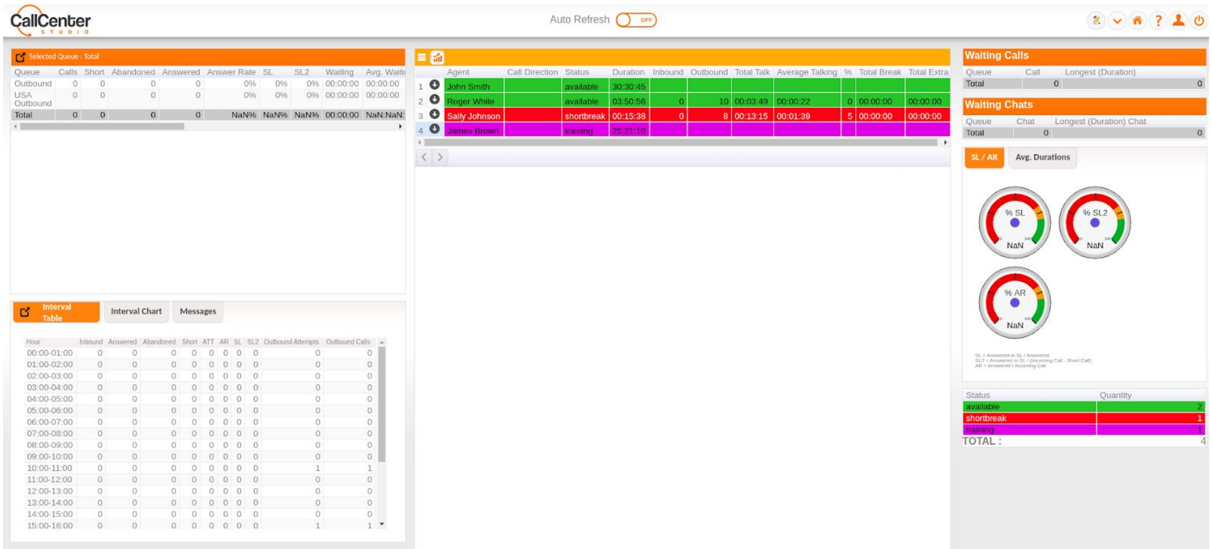
Automatic Refresh

The automatic refresh button is located on the top of the supervisor screen. When Auto Refresh is "On" updates will be refreshed in real-time.

Auto Refresh can be turned off by clicking the refresh button. As shown below:

Agent Default Screen

The agent default screen is the first screen that appears when the Supervisor tab is clicked from this screen; multiple contact center matrixes are provided.



Queue Performance Table

Located in the top left-hand corner of the supervisor default screen is the Queue Performance table, as shown below:

Selected Queue : Total

Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting
inbound	9	5	0	4	44%	100%	100%	00:00:16	00:00:04
Total	9	5	0	4	44%	100%	100%	00:00:16	00:00:01

This table provides queue metrics based on individual queues. Multiple queues can be compared at a glance, and decisions can be made based on the information provided. Number of calls, number of short calls, number of abandoned calls, number of answer calls, the answer rate, service level, waiting time and average waiting time, outbound attempts, talk times, and chat details are provided.

Also, when the expand button, , is clicked. The table above will appear in a pop-up window format, as shown below:

Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting	Talk	Avg. Talk	Release	Ou
outbound	0	0	0	0	0%	0%	0%	00:00:00	00:00:00	00:00:00	00:00:00	0	
inbound	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	
Total	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	

Interval Table

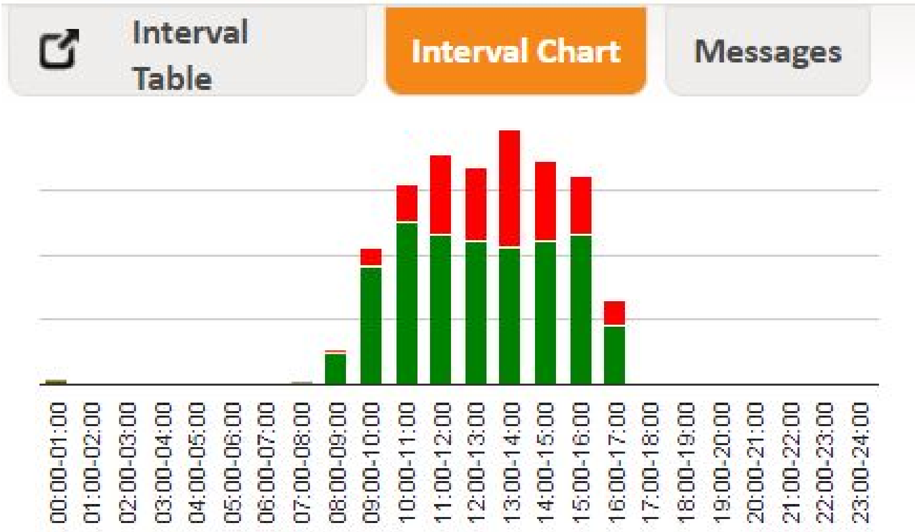
Information such as calls per hour, answered calls, and service level can be viewed here. It is possible to view total values and hourly values by selecting individual hour lines.

Interval Table | Interval Chart | Messages

Hour	Inbound	Answered	Abandoned	Short	ATT	AR	SL	SL2	Outbound Attempts	Outbound Calls
00:00-01:00	0	0	0	0	0	0	0	0	0	0
01:00-02:00	0	0	0	0	0	0	0	0	0	0
02:00-03:00	0	0	0	0	0	0	0	0	0	0
03:00-04:00	0	0	0	0	0	0	0	0	0	0
04:00-05:00	0	0	0	0	0	0	0	0	0	0
05:00-06:00	0	0	0	0	0	0	0	0	0	0
06:00-07:00	0	0	0	0	0	0	0	0	0	0
07:00-08:00	0	0	0	0	0	0	0	0	0	0
08:00-09:00	0	0	0	0	0	0	0	0	0	0

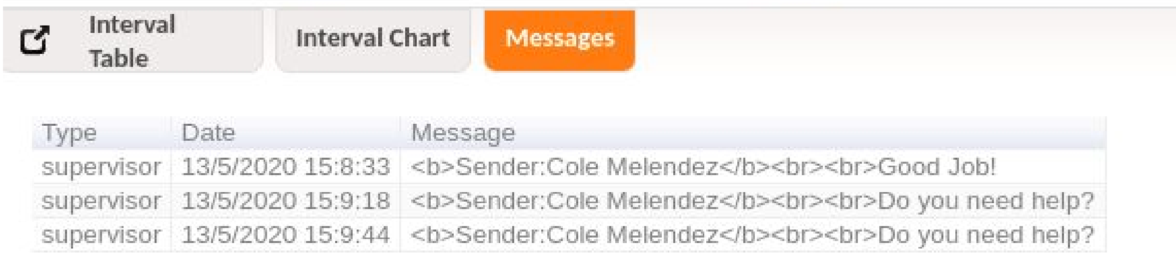
Interval Chart

Inbound calls are expressed with graphics. Green columns indicate answered calls, and red columns show missed calls.



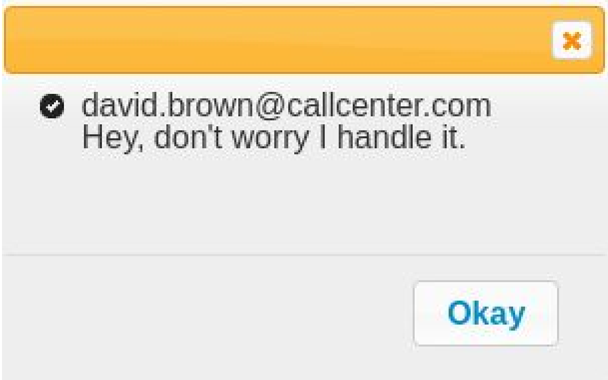
Messages

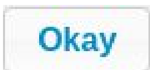
Previous messages from agents assigned to the supervisor can be viewed here.



Type	Date	Message
supervisor	13/5/2020 15:8:33	Sender:Cole Melendez Good Job!
supervisor	13/5/2020 15:9:18	Sender:Cole Melendez Do you need help?
supervisor	13/5/2020 15:9:44	Sender:Cole Melendez Do you need help?

Incoming messages from an agent will pop-up in the middle of the supervisor screen, as shown below:



Click the Okay button, 

, to return to the supervisor screen.

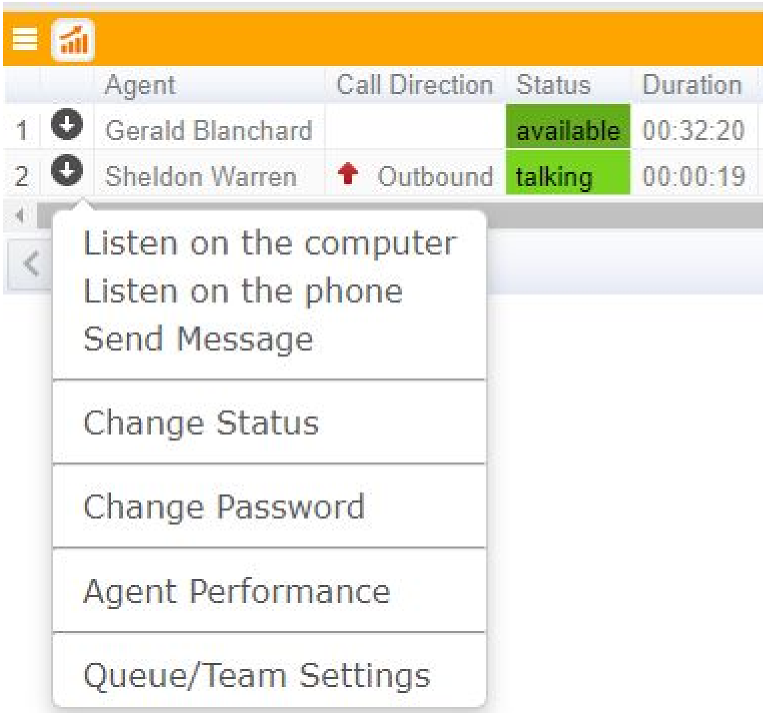
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details such as length of status duration, inbound, and outbound call totals are provided here. Also, using this list, agents can be messaged, their status can be changed along with their password, individual performance can be viewed, and queue or team modifications for each agent can be made.

	Agent	Call Direction	Status	Duration	Inbound	Outbound	Total Talk	Average Talking	%	Total Break	Total Ex
1	Keyon Sweeney		chatting (1)	00:00:12	0	0	00:00:00	00:00:00	0	00:09:07	00:02:4
2	Harold Kirk		available	00:14:06	2	0	00:01:31	00:00:45	5	00:00:00	00:12:3
3	John Smith		available	00:14:04	2	0	00:01:39	00:00:49	4	00:09:13	00:03:1
4	Vincent Warner		available	00:14:04	1	4	00:08:38	00:01:43	21	00:00:17	00:09:0
5	Jared Walter		available	00:14:02	1	0	00:00:31	00:00:31	1	00:00:22	00:11:3
6	Paul Baker		available	00:13:33	1	0	00:00:37	00:00:37	2	00:00:00	00:05:4
7	Gerald Blanchard		available	00:13:18	0	0	00:00:00	00:00:00	0	00:00:00	00:13:1
8	Cole Melendez		available	00:00:58	0	6	00:05:03	00:00:50	8	00:00:20	00:10:3
9	Khloe Bond		available	00:00:42	1	3	00:03:49	00:00:57	6	00:00:31	00:12:5

Listening to an Agent’s Phone Call

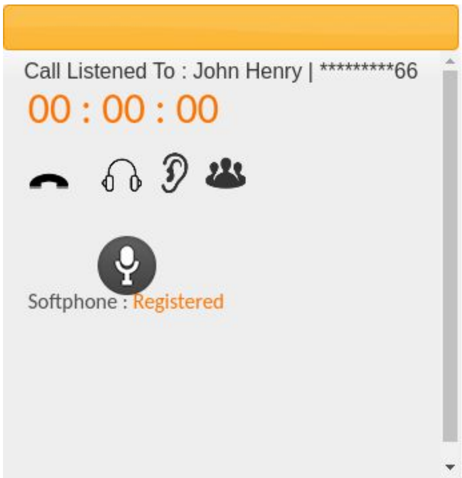
1. Click the button of the desired agent. This button is located to the left of the agent’s name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:

- *Listen on the computer*
- *Listen on the phone*

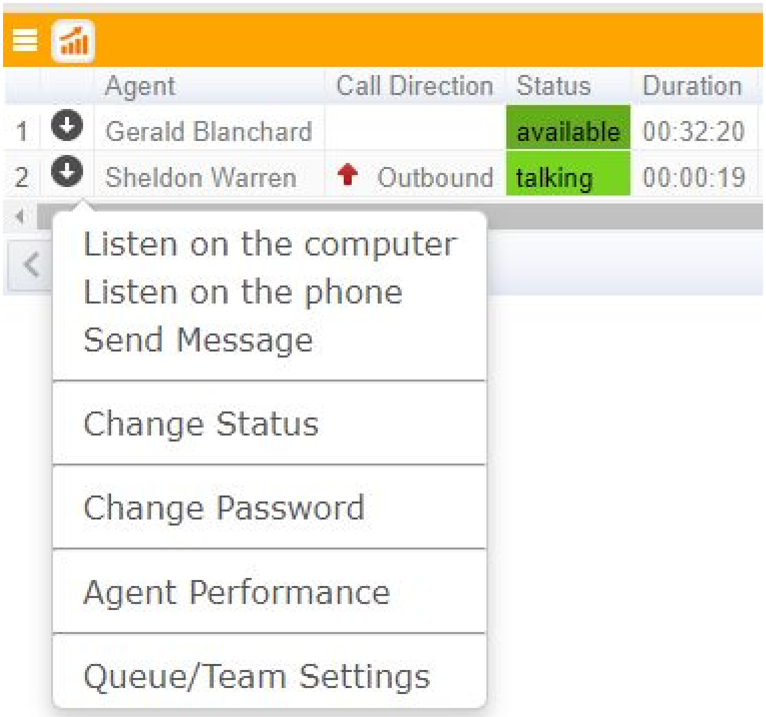
2. Click either “Listen on the computer” button or “Listen on the phone” button (If the supervisor has IP phone enabled), the following pop-up window will appear:



3. Click the “Listen” button, .
    - Click the “Whisper” button, . To support the agent, without joining the call.
    - Click the “Conference” button, . To support the agent, by joining the call.
4. Click the “Hangup” button, . To leave the call.

Sending a Message to an Agent

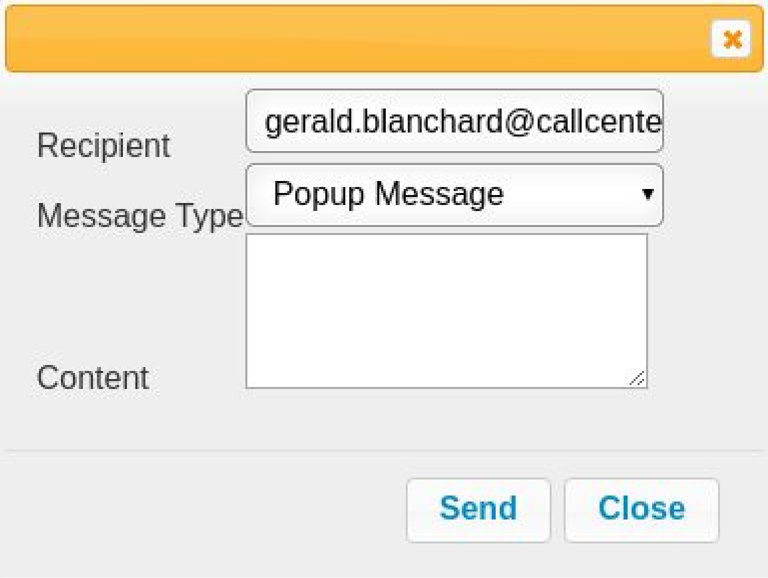
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



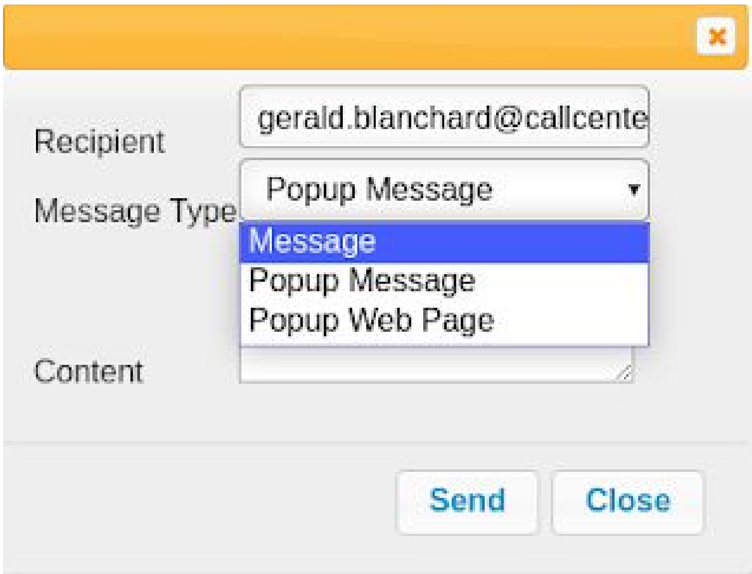
Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

5. Click the “Send Message” button; the following pop-up window will appear:



6. Click the ‘Message Type” dropdown box. The following selections will appear:



7. Select the desired message type.

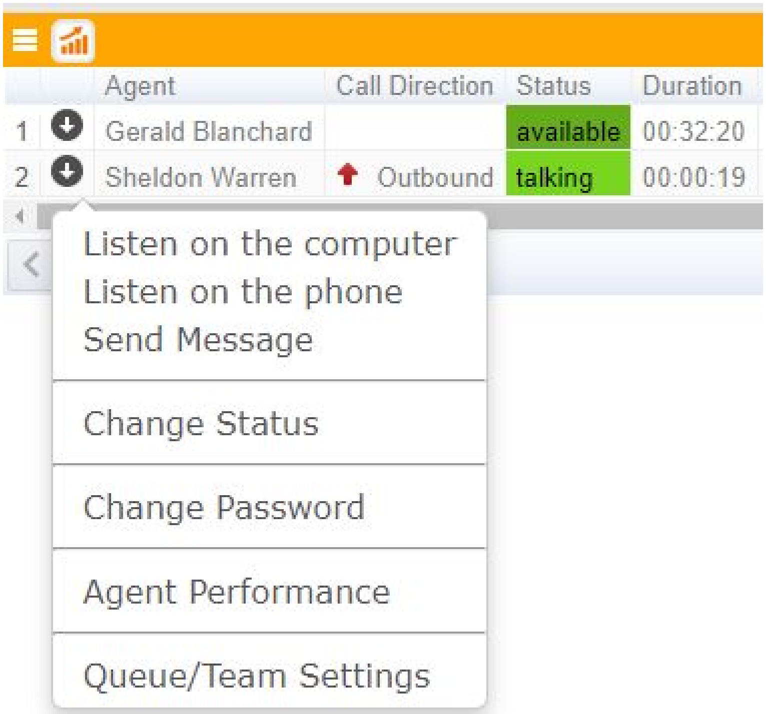
8. Click the “Content” input box, type the desired message.

9. Click the “Send” button, 

.

Changing an Agent’s Status

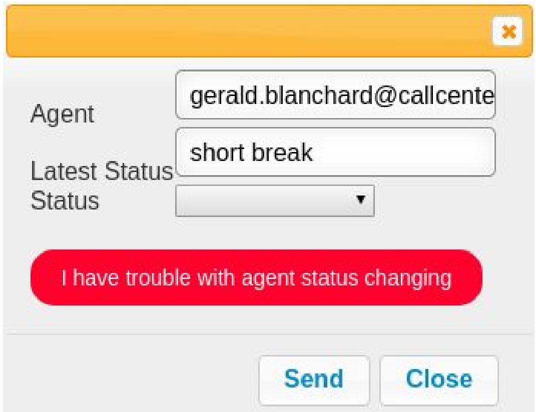
1. Click the button of the desired agent. This button is located to the left of the agent’s name the following pop-up window will appear:



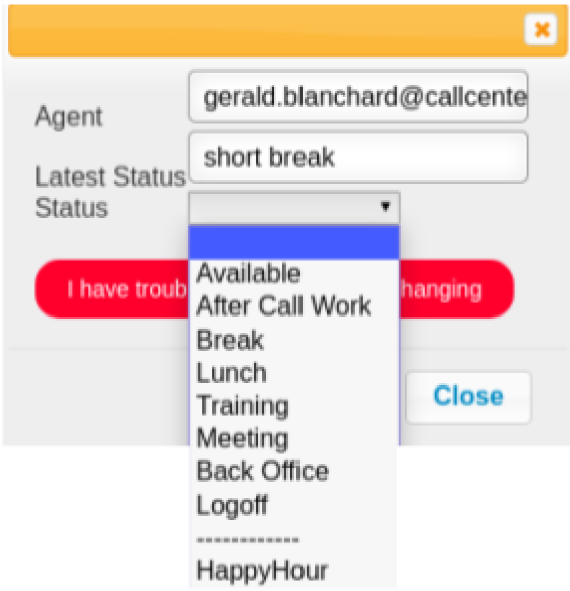
Note: the following options are only available when the agent is in “Talking” status:

- *Listen on the computer*
- *Listen on the phone*

2. Click the "Change Status" button; the following pop-up window will appear:



3. Click the "Status" dropdown box. The following drop-down menu will appear:



Note: Statuses below the dotted line are custom statuses created in the Statuses section of the administrator screen. Here a custom status is used to provide an example of how they appear on the supervisor screen.

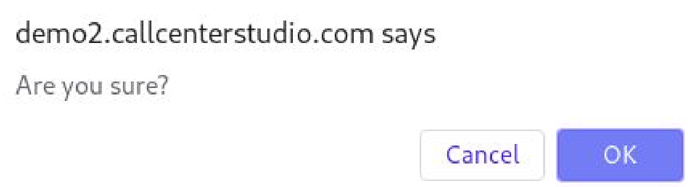
4. Make a status selection.

5. Click the “Send” button, 

.

Note: If you are having trouble making an agent status change, click the following button shown below:

The following pop-up window will appear:



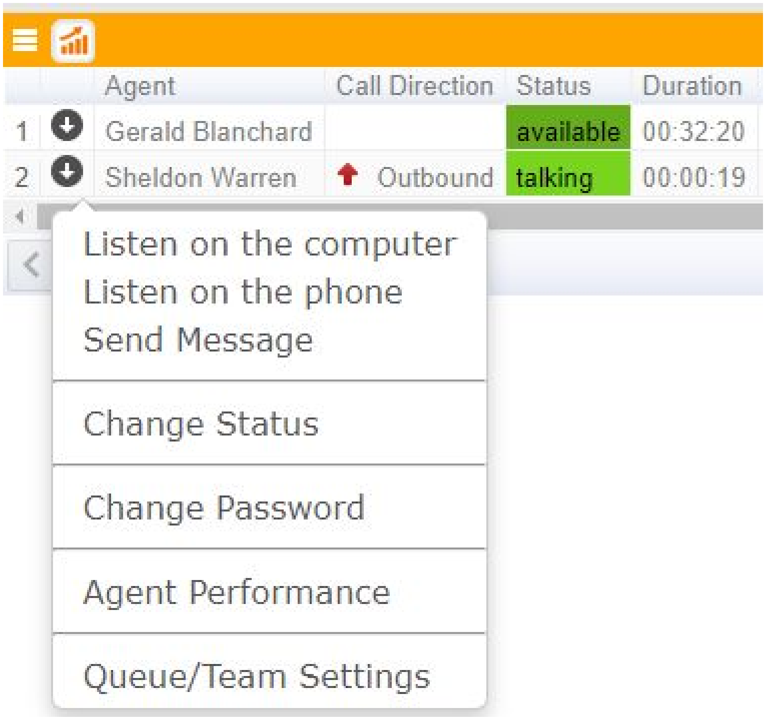
Note: This is using an example tenant; instead of demo2.callcenterstudio.com, it will be “YourDesiredTenantName.”callcenterstudio.com.

Click the Okay button, 

.

Changing an Agent's Password

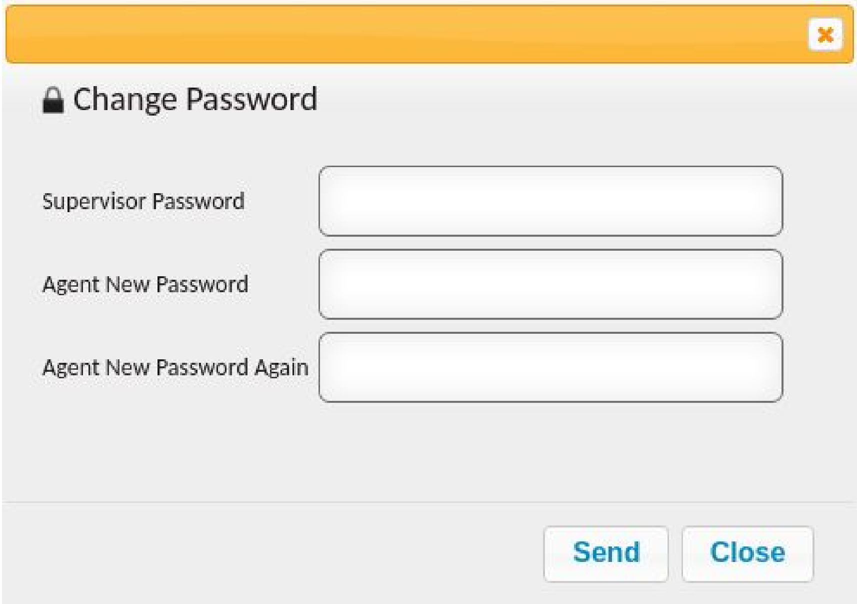
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

2. Click the “Change Password” button. The. The following pop-up window will appear:

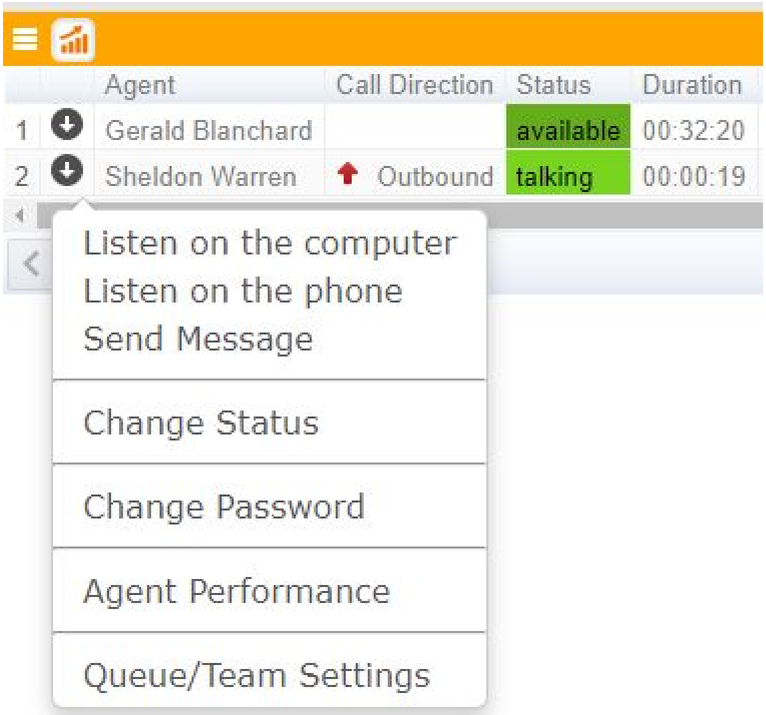


3. Click the “Supervisor Password” input box, type the password for the supervisor account in use.
4. Click the “Agent New Password” input box, type the agent’s desired new password.
5. Click the “Agent New Password Again” input box, type the agent’s desired new password again.
6. Click the “Save button, 

.

Viewing Agent's Performance

1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in "Talking" status:

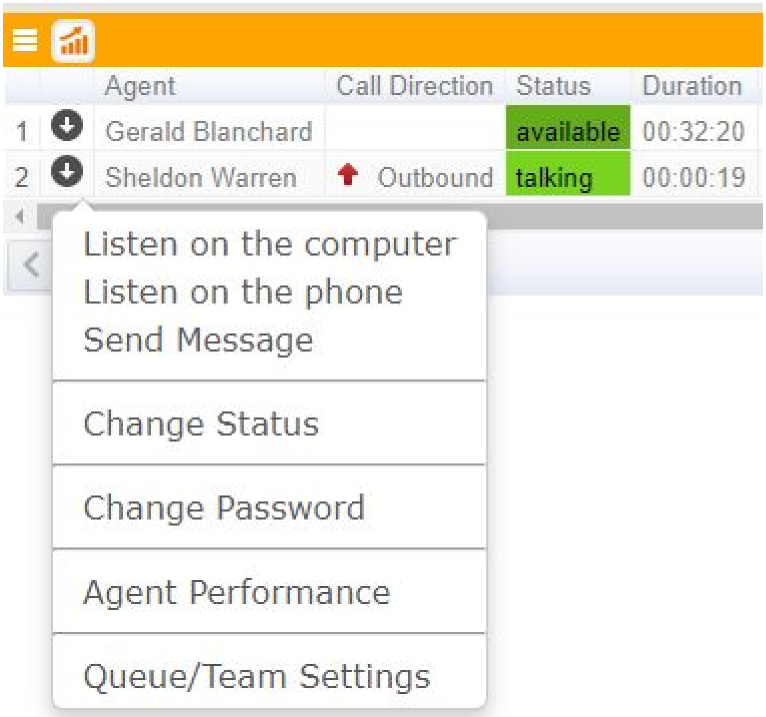
- *Listen on the computer*
- *Listen on the phone*

2. Click the "Agent Performance" button. The following pop-up window will appear:

3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Changing Agent’s Queue / Team Settings

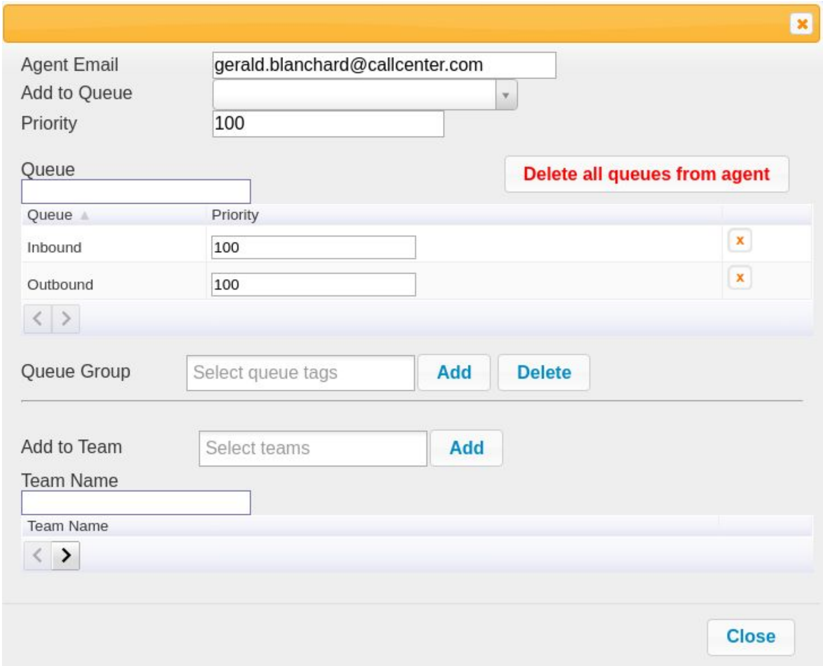
1. Click the button of the desired agent. This button is located to the left of the agent’s name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:

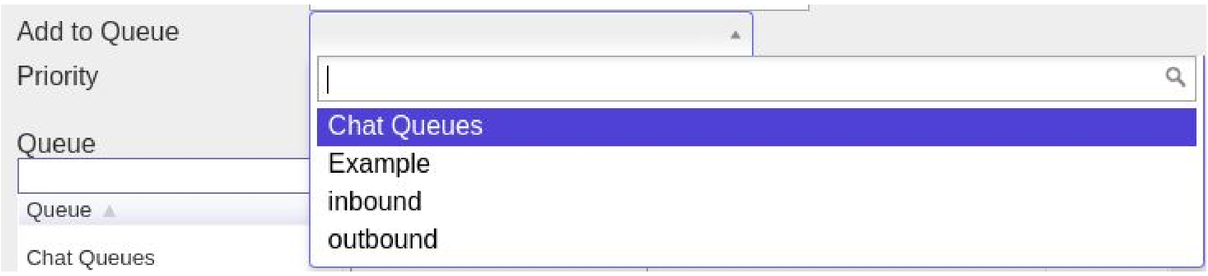
- *Listen on the computer*
- *Listen on the phone*

2. Click the “Queue / Team Settings” button. The following pop-up window will appear:



Adding Agent to a Queue

1. As you can see underneath the Agent Email, the agent can be added to multiple queues:



2. In most cases, the priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the priority value is set at 100 for John, meaning he will be the first to receive an inquiry within a defined queue.

3. 'Queue' Box allows the user to type the name of a queue manually. (For searching purposes)

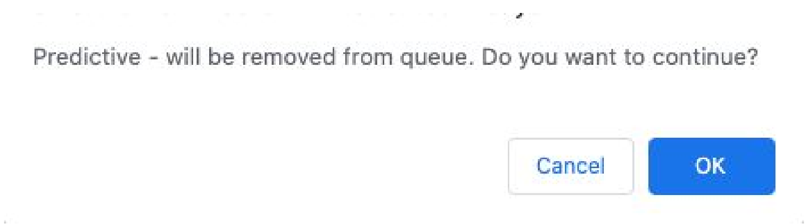
4. "Delete all queues from the agent" button is located right next to it, allowing the user to remove the agent from all the previously assigned queues.

5. Added queues and priority levels can be seen here.

Queue	Priority	
Predictive	100	x
Sales	100	x
Technical Support	100	x
Test_Q	100	x

Deleting a Queue

1. To delete queues from the user, click the delete button x, located to the far right of the desired queue. When the delete button is clicked the following pop-up will appear:



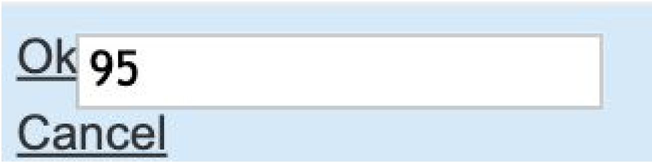
- *Select the cancel button, , will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

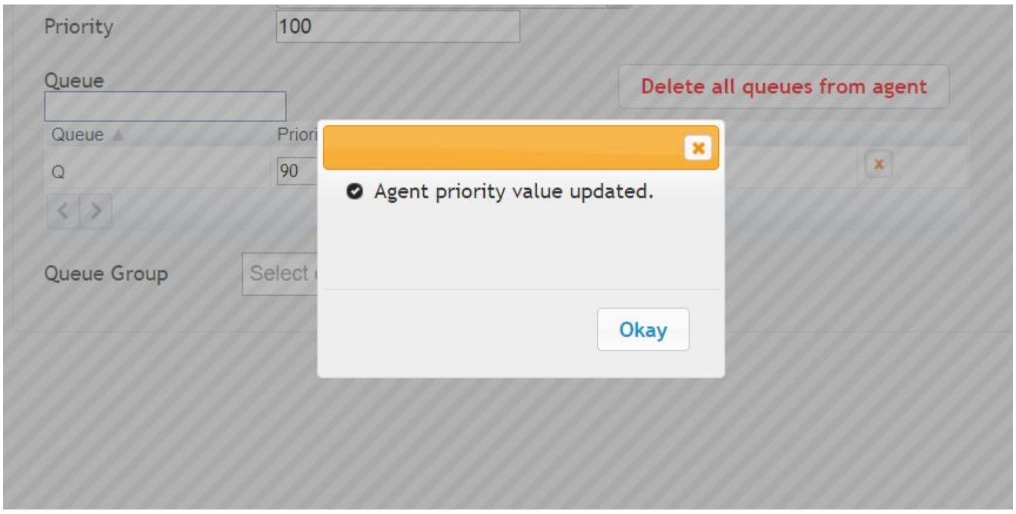
The screen will reload, and the deleted queue will not be shown.

Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in adding a user section.



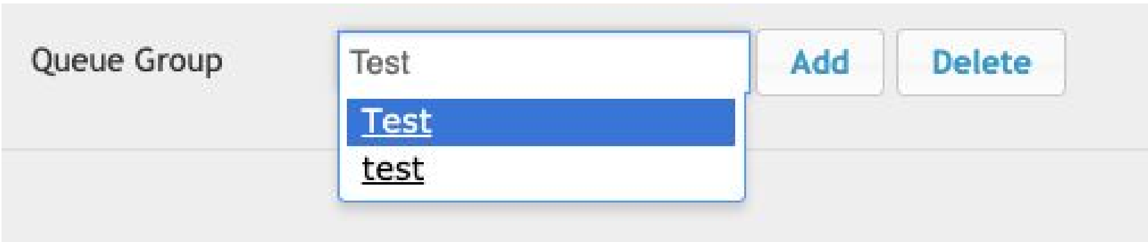
2. Click the Ok button,  , to acknowledge the additions and to update the priority value.



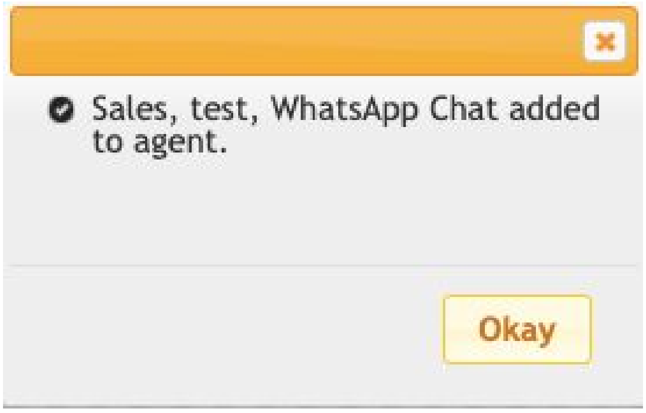
3. Click the cancel button,  , to cancel the change.

Adding an Agent to a Queue Group

1. Click the desired “Queue group” to add the user to a queue group:



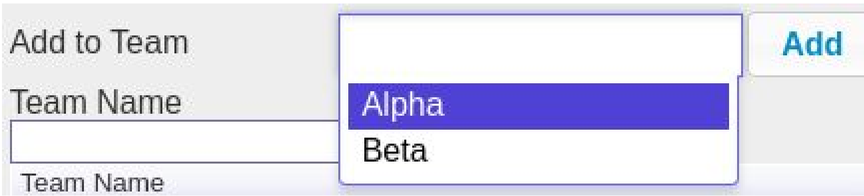
2. Once the queue group is selected, click the Add button,  , When the add button is clicked the following pop-up will appear:

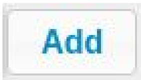


3. Select the Okay button,  , to confirm the addition.

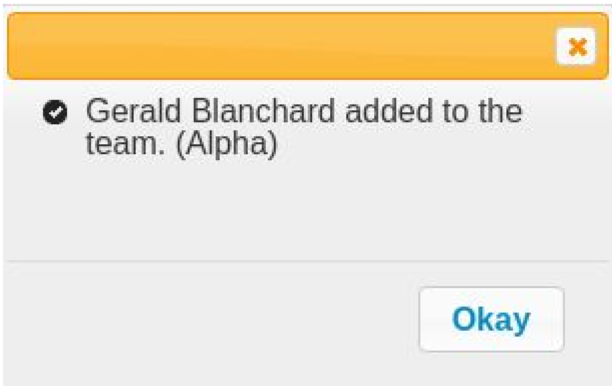
Adding an Agent to a Team

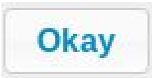
1. Click the "Add to Team" input box, the following dropdown menu with available teams will appear:



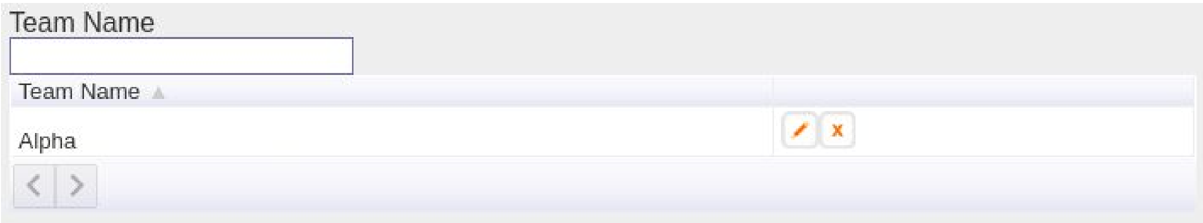
2. Select the desired team.
3. Click the "Add" button, 

. The following pop-up window will appear:



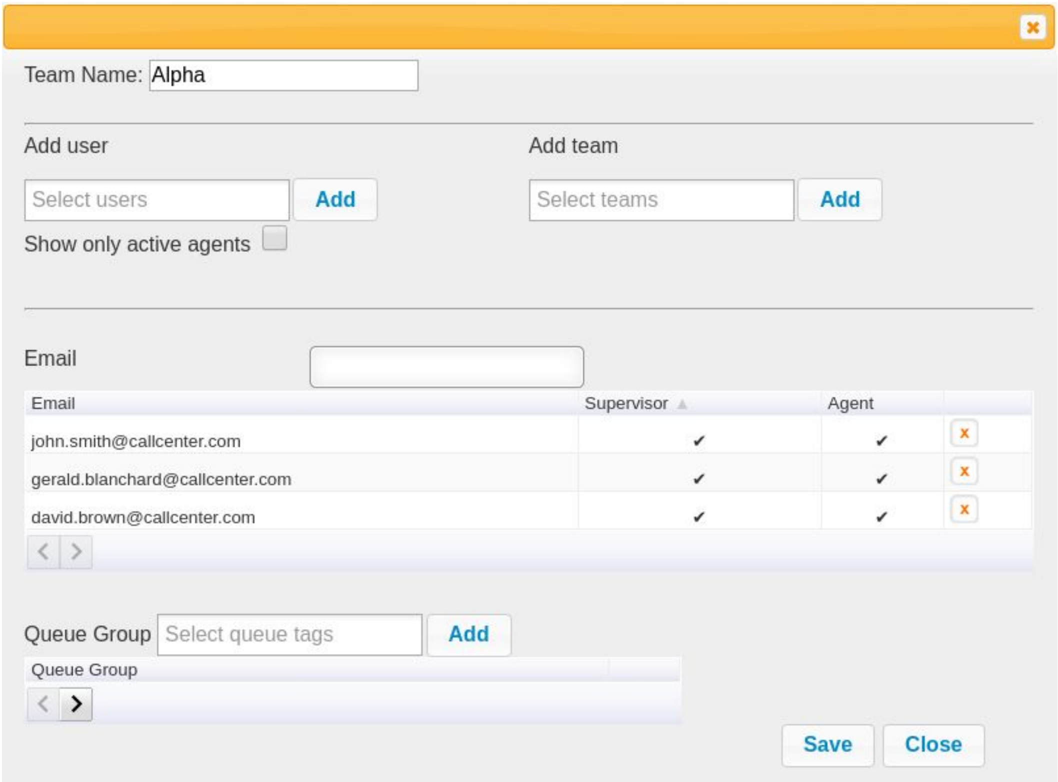
4. Click the "Okay" button, 

. The team list will show the updated team, as shown below:

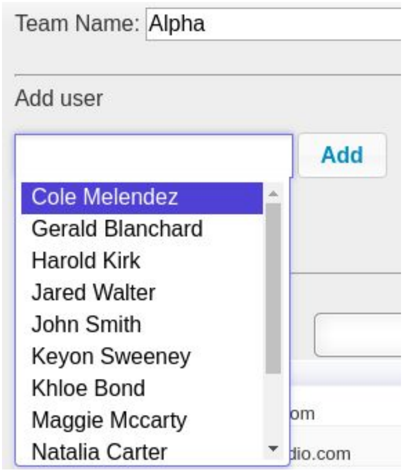


Editing a Team

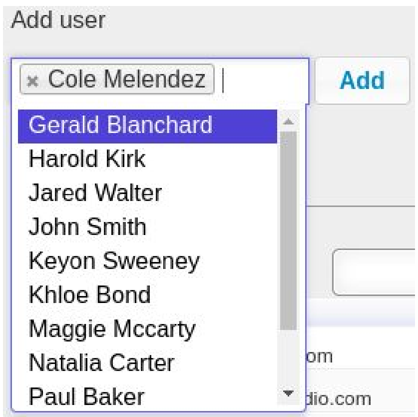
1. Click the edit button, , of the desired team from the individual Agent's Queue / Team Settings. The following window will appear:



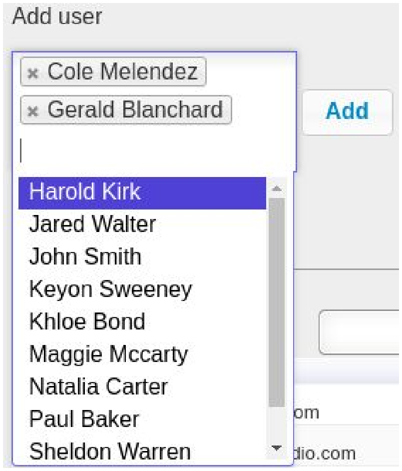
2. Add users to the team by clicking the "Select users" input box, a dropdown list of available users will appear, as shown below:



3. Click the desired user, "Cole Melendez," from the dropdown list, if down correctly the selection will look like the picture below:



Note: Multiple users can be added at the same time. For example, "Gerald Blanchard," can be selected, as shown below:

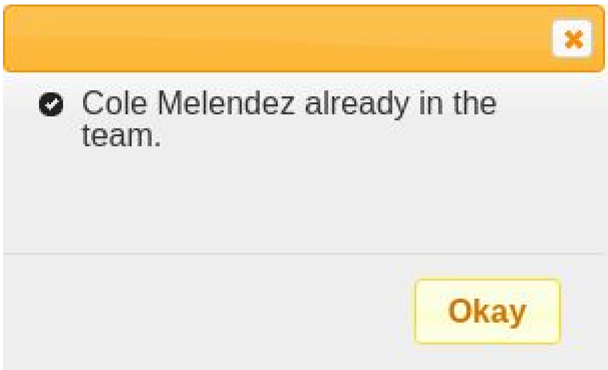


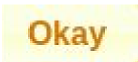
Both of the desired users were added to the input box above. If a user was clicked by accident, the user could be removed by pressing the, "X," to the left of the user's name:

The user, "Gerald Blanchard," was deleted from the user add list shown above.

4. To add the user ("Cole Melendez") to the team, press the add button, 

, if done correctly the following pop-up window will be displayed:

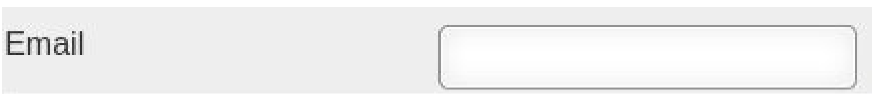


5. Click the Okay button, 

, once the user will appear in the list as shown below:

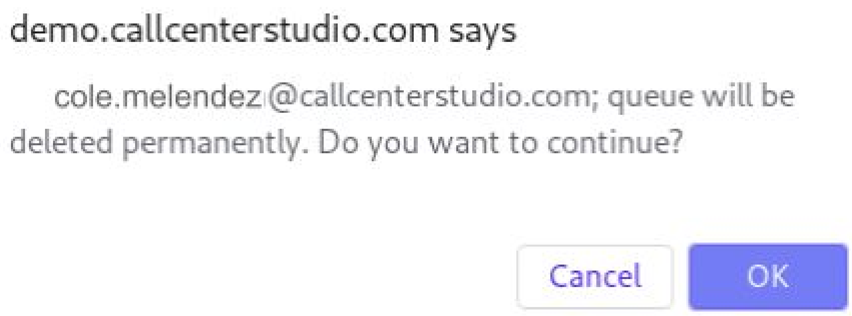
Note: Their access level is also listed. In this example, Cole is both a Supervisor and an Agent indicated by the checkmarks.

Click the input box to the right of Email, type the desired user's email. This search box can be used to find team members quickly, as shown below:



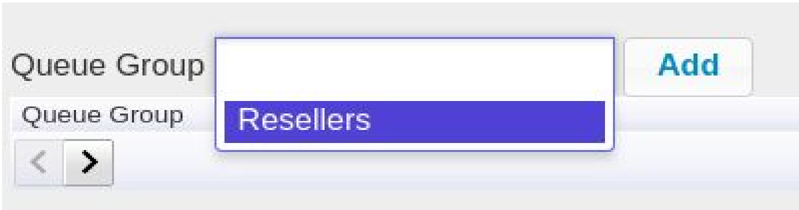
The search box can be used to search for users. Click the input box, type the user's email.

Team members can be deleted here by pressing, x*, to the right of checkmarks. If the,* x*, is clicked the pop-up below will be shown to confirm the deletion:*



- *Select the cancel button,* Cancel *, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

7. Once users are added, the team can be added to a queue. Add a team to a queue by clicking the "Select queue tags" input box, a dropdown list of available queues will appear, as shown below:



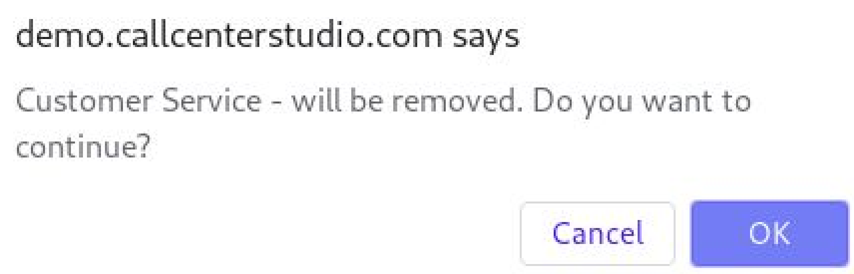
8. Click the desired queue, "Customer Service" (an example) from the dropdown list, if down correctly the selection will look like the picture below:

Note:

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, "X", to the left of the queue name.*

9. To add the queue ("Customer Service") to the team, press the add button, Add, if done correctly, the queue will be displayed under the "Queue Group" list as shown below:

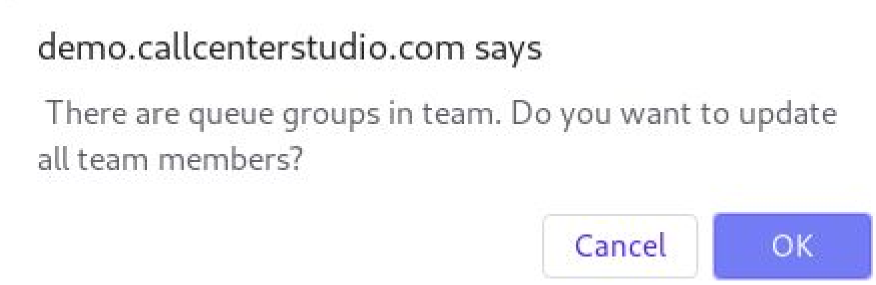
Queues can be deleted here as well by pressing, x*, to the right of the queue name. If the,* x*, is clicked the pop-up below will be shown to confirm the deletion:*



- *Select the cancel button,* Cancel*, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

10. Once the user and queue selection is complete, the information can be saved by clicking the save button, 

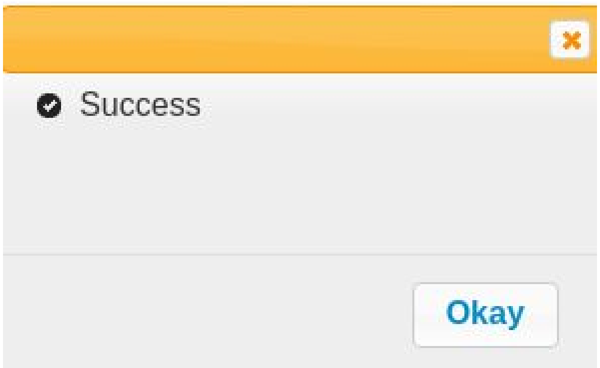
, the following pop-up box will appear:



11. Click the Ok button, 

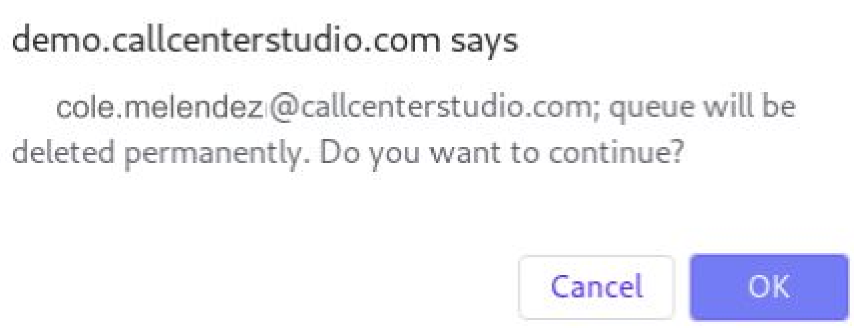
, to confirm the update.

After pressing the "Ok" button, the following pop-up window will be displayed:



Deleting an Agent from a Team

1. Click the delete button, , of the desired team from the individual Agent's Queue / Team Settings. The following pop-up window will appear:

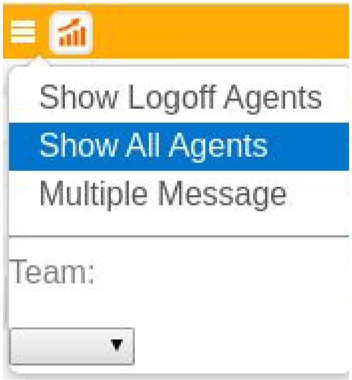


- *Select the cancel button,* Cancel *, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

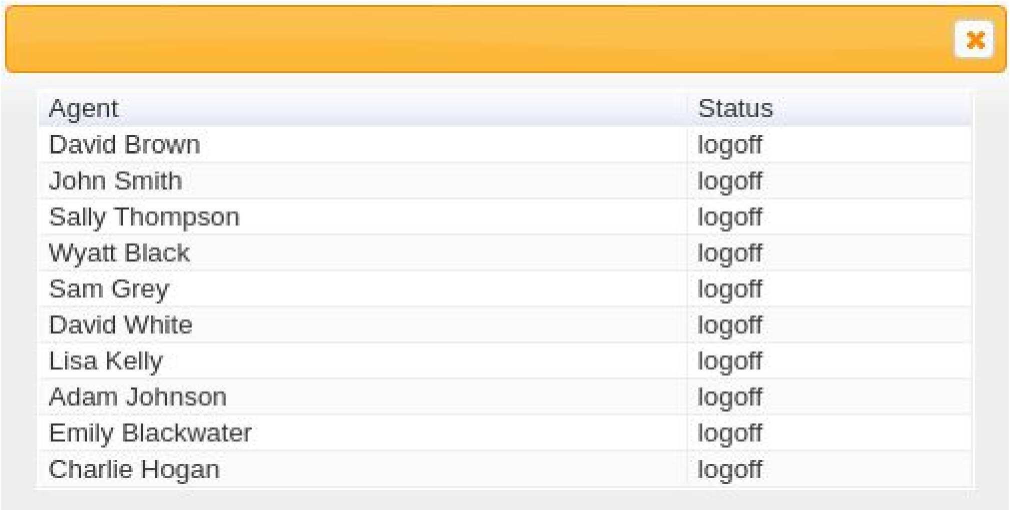
2. Confirm the deletion by clicking the OK button, OK.

Viewing Logged Off Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the "Show Logoff Agents" button. The following pop-up window will appear:

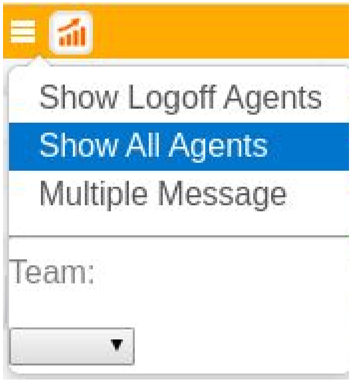


Agent	Status
David Brown	logoff
John Smith	logoff
Sally Thompson	logoff
Wyatt Black	logoff
Sam Grey	logoff
David White	logoff
Lisa Kelly	logoff
Adam Johnson	logoff
Emily Blackwater	logoff
Charlie Hogan	logoff

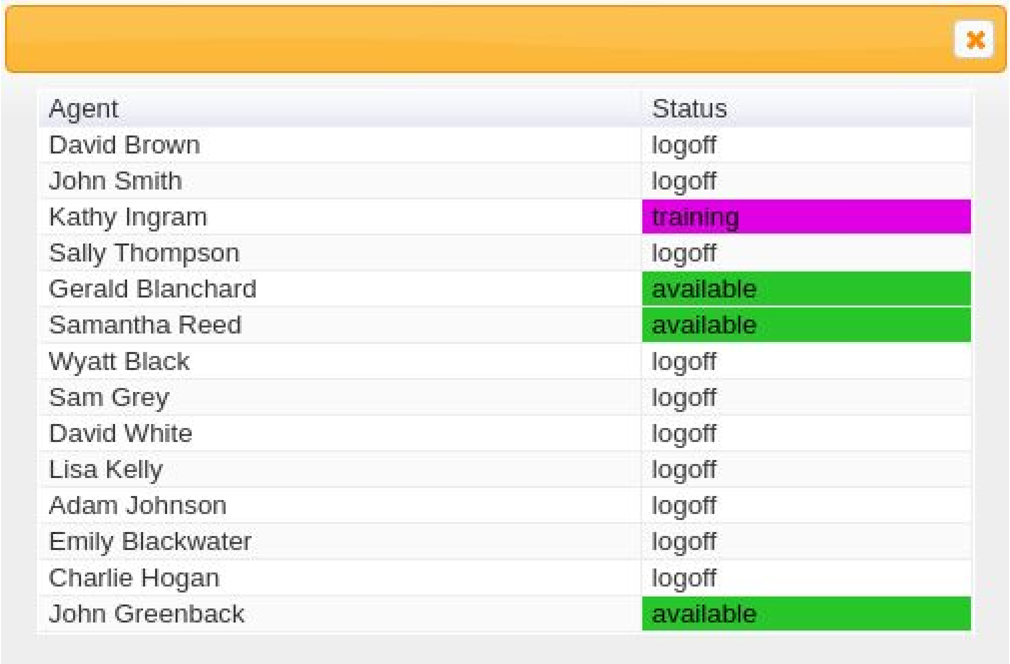
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Viewing All Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



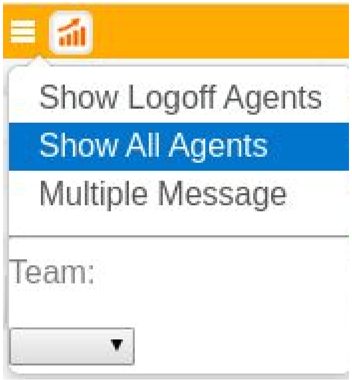
2. Click the "Show All Agents" button. The following pop-up window will appear:



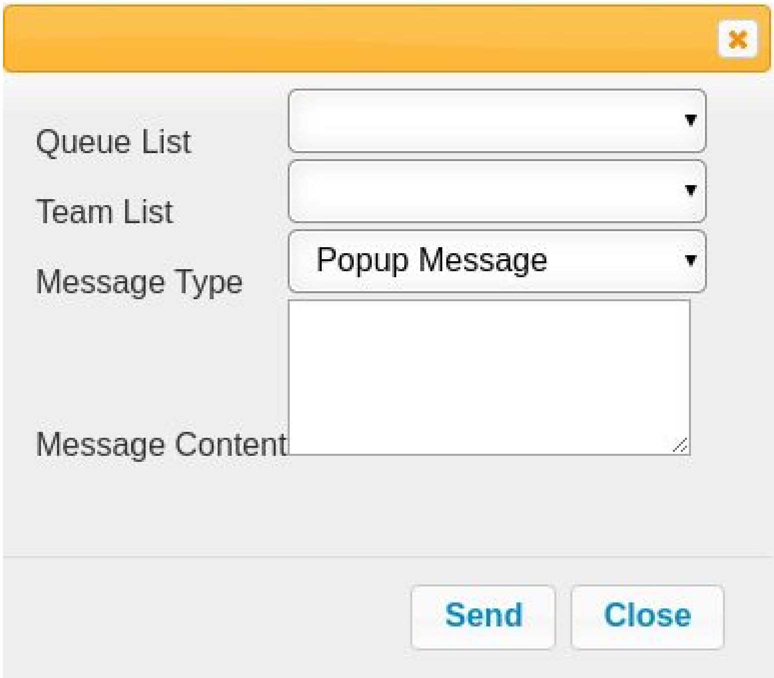
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Sending a Message to Multiple Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the "Multiple Message" button. The following pop-up window will appear:



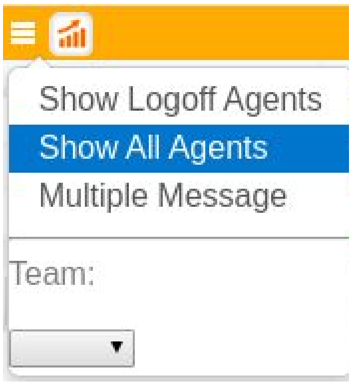
3. Click the "Queue List" dropdown box, select the desired queue.

4. Click the "Team List" dropdown box, select the desired team.

5. Click the “Message Type” dropdown box, select the desired message type.
6. Click the “Message Content” input box, type the desired message.
7. Click the “Send” button, Send.

Filter Agent Status List by Team

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the “Team” dropdown box, select the desired team. The updated agent status list will only show the members of the selected team.

Waiting Calls & Waiting Chats

Details about how many calls and chats are in waiting status and the queue with the longest wait time can be viewed here.

If desired, a waiting call or chat alarm can be created in the alarms menu, and it can be highlighted to catch the user's attention.

Waiting Calls

Queue	Call	Longest (Duration)
inbound	2	39
Total	2	39

Waiting Chats

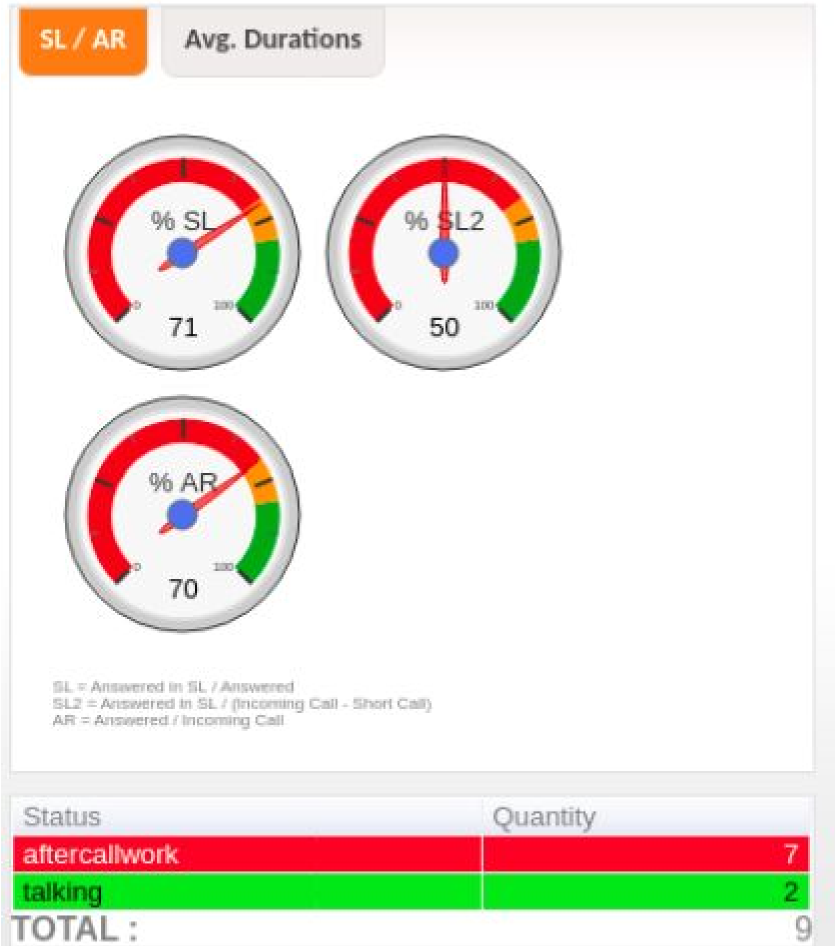
Queue	Chat	Longest (Duration) Chat
inbound	1	13
Total	1	13

Viewing Agent Performance Graphically

1. Click the button, located in the top left-hand corner of the Agent Status List.

   The following graph will appear:

SL/AR and Average Holding Times



Service levels and answering ratios are displayed here:

SL Ratio:

$$\frac{\textit{Answered calls}}{\textit{Incoming call - Short call}}$$

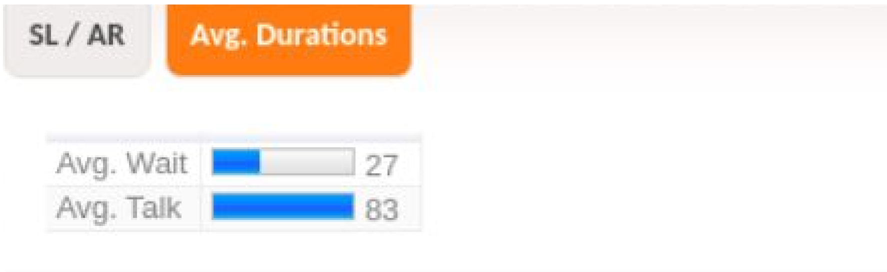
SL2 Ratio:

$$\frac{\textit{Calls answered in the service level}}{\textit{Incoming calls - Short calls}}$$

Answering Ratio (Answer Rate (AR)):

$$\frac{\textit{Answered calls}}{\textit{Incoming calls}}$$

Average Holding Times



Status

Statuses of customer representatives are listed in this module. Customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

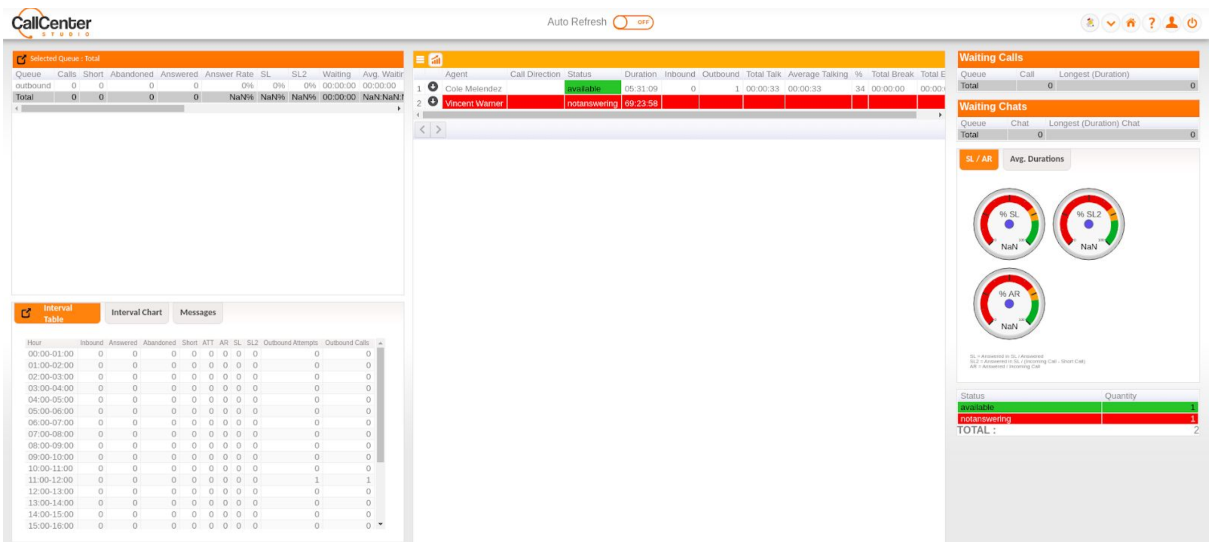
aftercallwork	1
available	20
backoffice	20
shortbreak	3
talking	25
training	10
wrapup	1
TOTAL	80

Queue Tab

The Queue tab button is used to refresh the default screen when the auto-refresh is not used.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

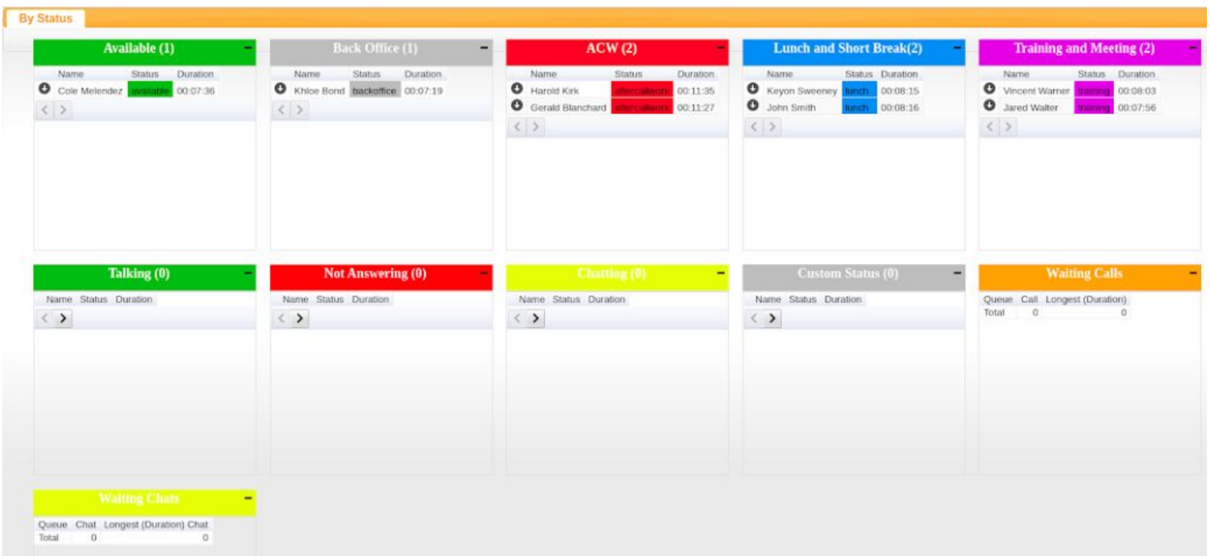
2. Select the "Queue" tab. The following screen will appear as a refreshed version of the default screen:



Agent Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Agent” tab. The following screen will appear:

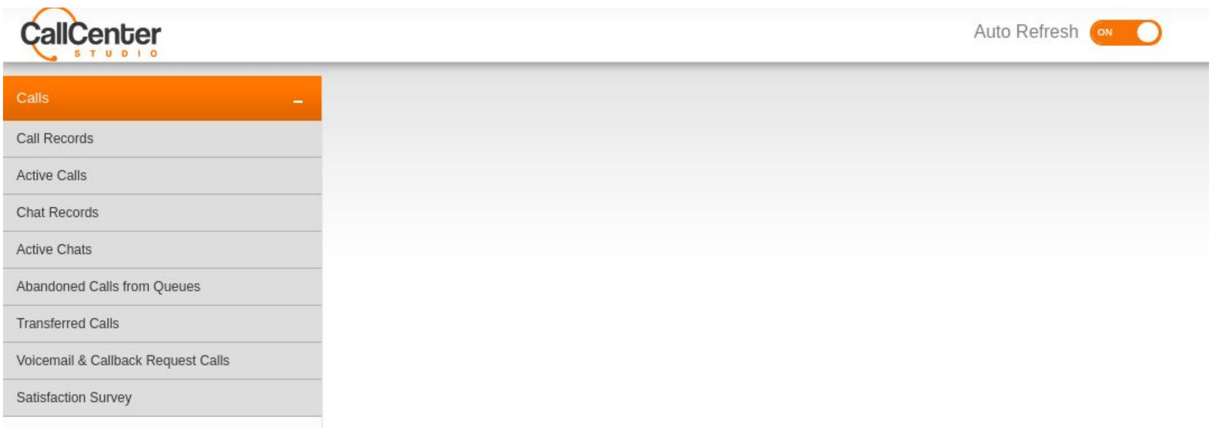


Agents can be followed according to status in this menu.

Call Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Call” tab. The following screen will appear:



3. For a complete explanation of the Call Tab, see the Quality Control Section > Call Tab.

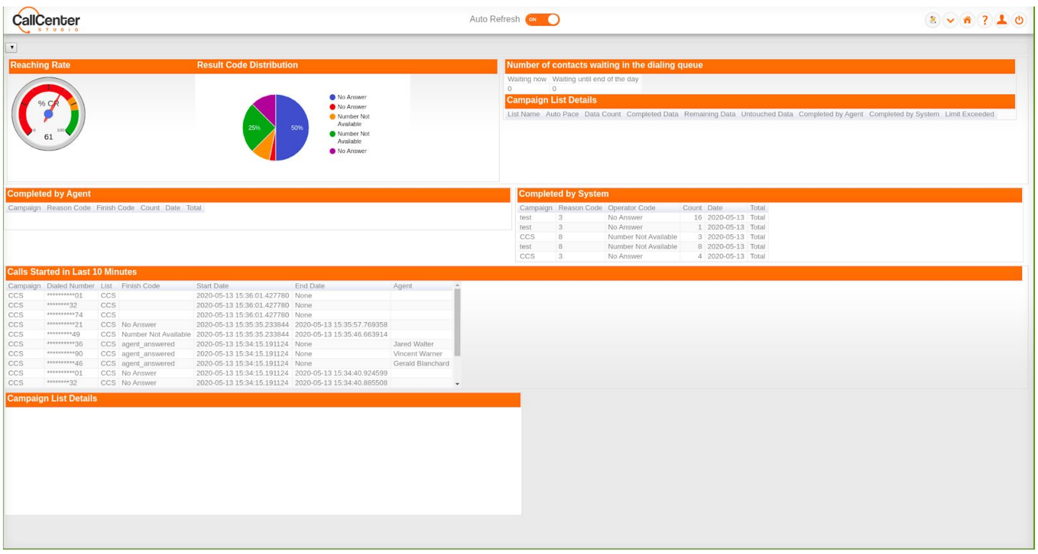
Campaign Tab

Campaigns are used for using the dialers built-in to Call Center Studio. Campaigns operate according to determined criteria.

If there is a campaign, details belonging to that campaign can be seen on the campaign screen. Such information as reaching ratios, distribution of result codes, loaded lists, metrics on calls completed, customer representative info, and result codes can be accessed. Moreover, the last 10-minute call logs called with Dialer System are also listed.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Campaign” tab. The following screen will appear:

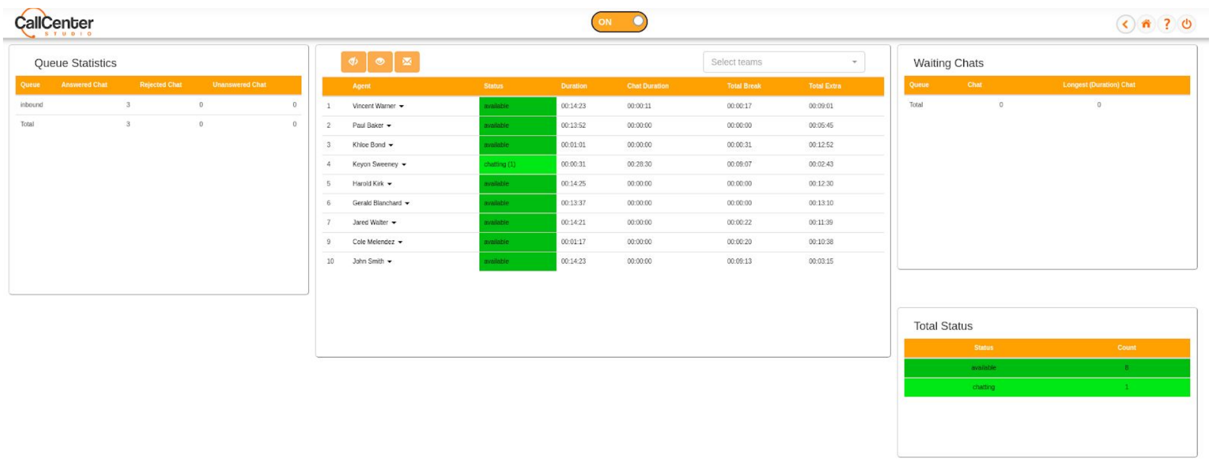


Chat Tab

The chat tab has similar features to the default supervisor screen, except it is solely used for monitoring chatting agents.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Chat” tab. The following screen will appear:



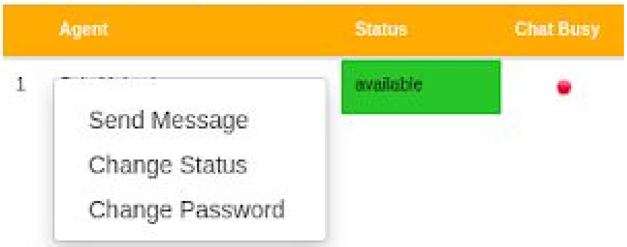
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details length of status, duration, and chat totals are provided here. Agents can be messaged; their status can be changed along with their password.

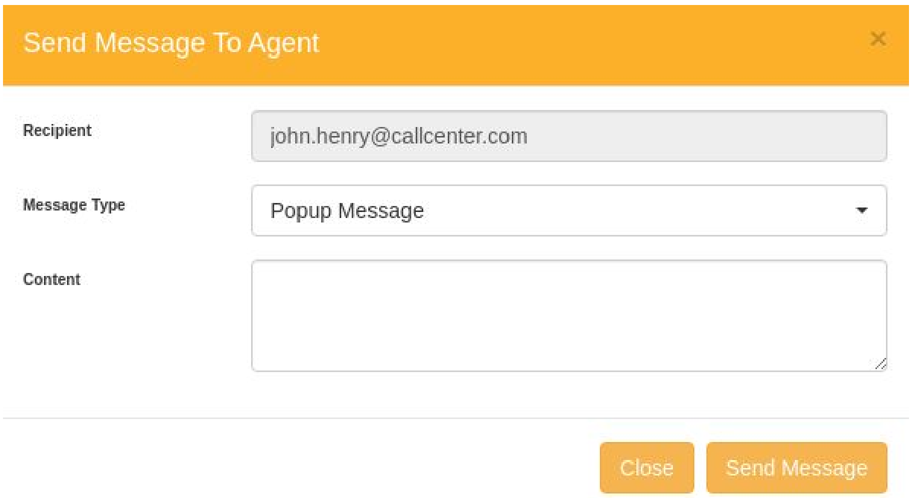
	Agent	Status	Duration	Chat Duration	Total Break	Total Extra
1	Vincent Warner	available	00:14:23	00:00:11	00:00:17	00:09:01
2	Paul Baker	available	00:13:52	00:00:00	00:00:00	00:05:45
3	Khloe Bond	available	00:01:01	00:00:00	00:00:31	00:12:52
4	Keyon Sweeney	chatting (1)	00:00:31	00:28:30	00:09:07	00:02:43
5	Harold Kirk	available	00:14:25	00:00:00	00:00:00	00:12:30
6	Gerald Blanchard	available	00:13:37	00:00:00	00:00:00	00:13:10
7	Jared Walter	available	00:14:21	00:00:00	00:00:22	00:11:39
9	Cole Melendez	available	00:01:17	00:00:00	00:00:20	00:10:38
10	John Smith	available	00:14:23	00:00:00	00:09:13	00:03:15

Sending a Message to an Agent

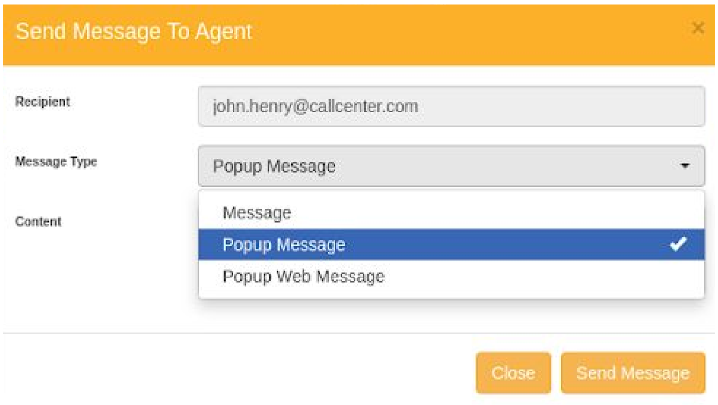
1. Click the desired agent name. The following pop-up window will appear:



2. Click the “Send Message” button. The following pop-up window will appear:



3. Click the 'Message Type" dropdown box the following selections will appear:



4. Select the desired message type.

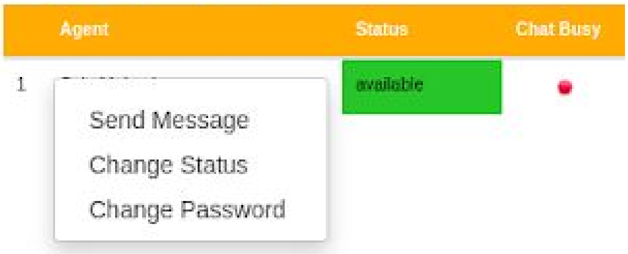
5. Click the "Content" input box, type the desired message.

6. Click the "Send Message" button, 

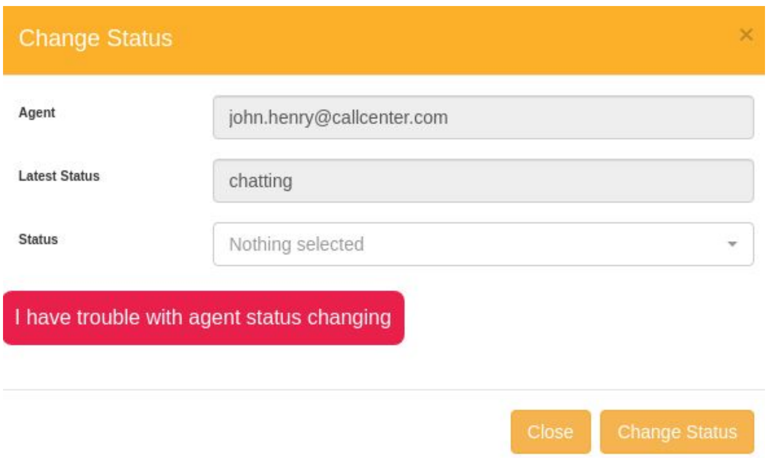
.

Changing an Agent’s Status

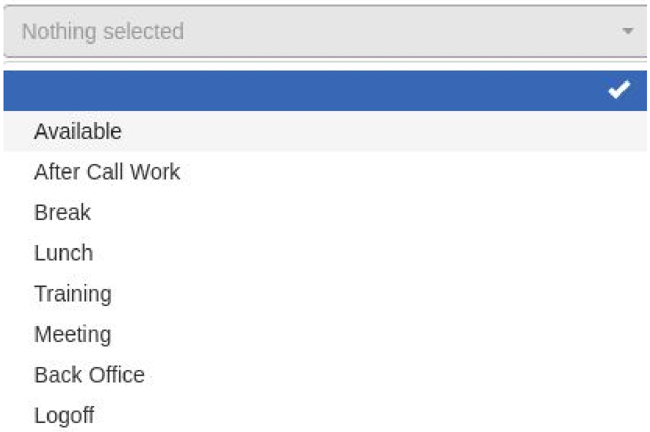
1. Click the desired agent name. The following pop-up window will appear:



2. Click the “Change Status” button. The following pop-up window will appear:



3. Click the “Status” dropdown box. The following drop-down menu will appear:



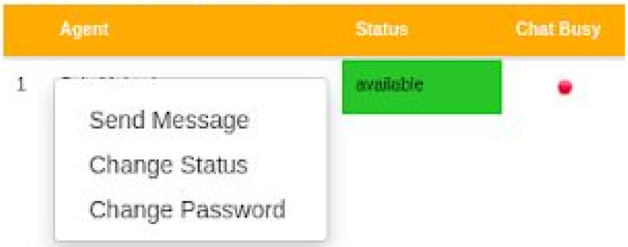
4. Make a status selection.

5. Click the “Change Status” button, 

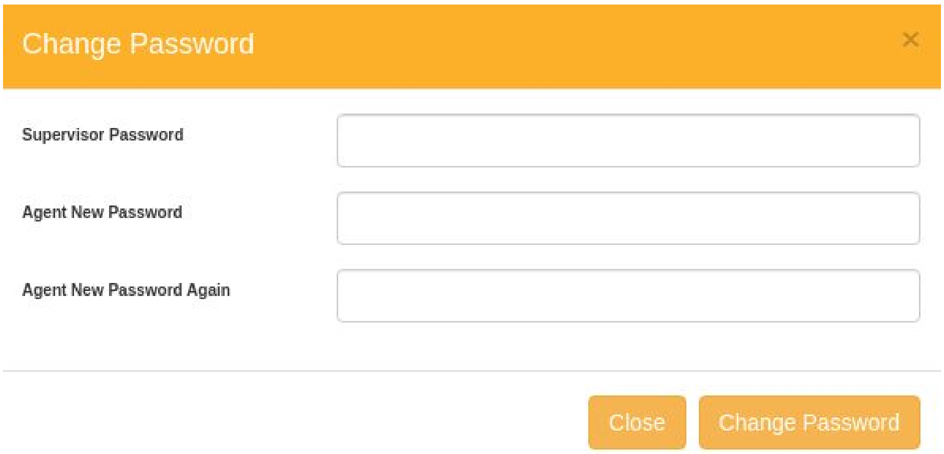
.

Changing an Agent's Password

1. Click the desired agent name. The following pop-up window will appear:



2. Click the "Change Password" button. The following pop-up window will appear:



3. Click the "Supervisor Password" input box, type the password for the supervisor account in use.
4. Click the "Agent New Password" input box, type the agent's desired new password.
5. Click the "Agent New Password Again" input box, type the agent's desired new password again.
6. Click the "Change Password" button, 

.

Viewing Logged Off Agents

1. Click the "Show All Agents" button, , located in the top left-hand corner of the Agent Status List. The following pop-up window will appear:

All Agents

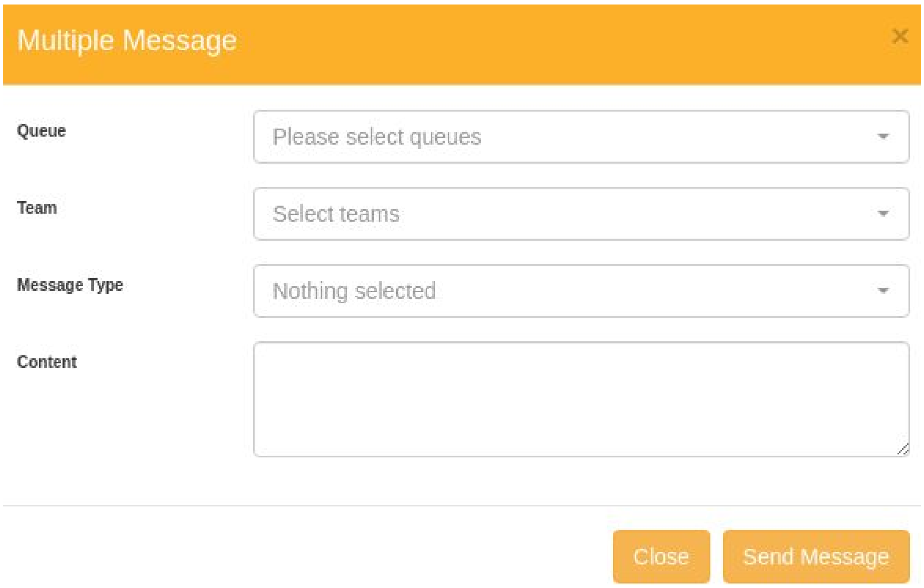
Agent	Status
Cole Melendez	available
Gerald Blanchard	notanswering
Harold Kirk	logoff
Jared Walter	aftercallwork
John Henry	chatting
John Smith	notanswering
Keyon Sweeney	logoff
Khloe Bond	logoff
Maggie Mccarty	notanswering
Natalia Carter	logoff
Paul Baker	logoff

2. After viewing, click the close button, Close.

Sending a Message to Multiple Agents

1. Click the  button, located in the top left-hand corner of the Agent Status List.

   The following pop-up window will appear:

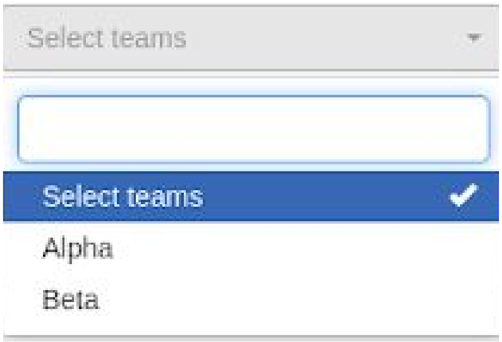


2. Click the “Queue List” dropdown box, select the desired queue.
3. Click the “Team List” dropdown box, select the desired team.
4. Click the “Message Type” dropdown box, select the desired message type.
5. Click the “Message Content” input box, type the desired message.
6. Click the “Send Message” button, 

.

Filter Agent Status List by Team

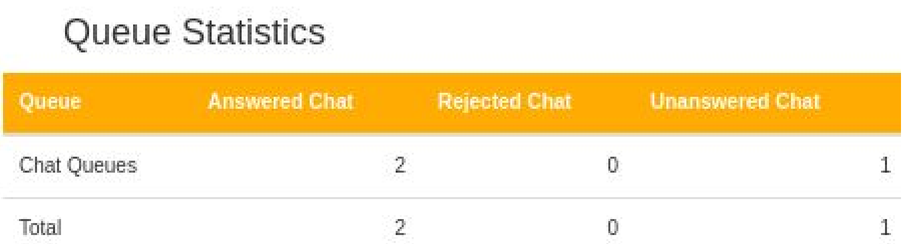
1. Click the "Team" dropdown menu, located in the top right-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Select the desired team. The updated agent status list will only show the members of the selected team.

Queue Statistics

The queue statistics window displays information regarding the chat queues. Information such as answered chats rejected chats, and unanswered chats can be found here.


Queue Statistics

Queue	Answered Chat	Rejected Chat	Unanswered Chat
Chat Queues	2	0	1
Total	2	0	1

Waiting Chats

The waiting chats window displays information regarding the chats waiting in the queues. Information such as the number of waiting chats and the longest duration are shown here.

Waiting Chats

Queue	Chat	Longest (Duration) Chat
Chat Queues	1	17
Total	1	17

Status

Statuses of customer representatives are listed in this module. Moreover, customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

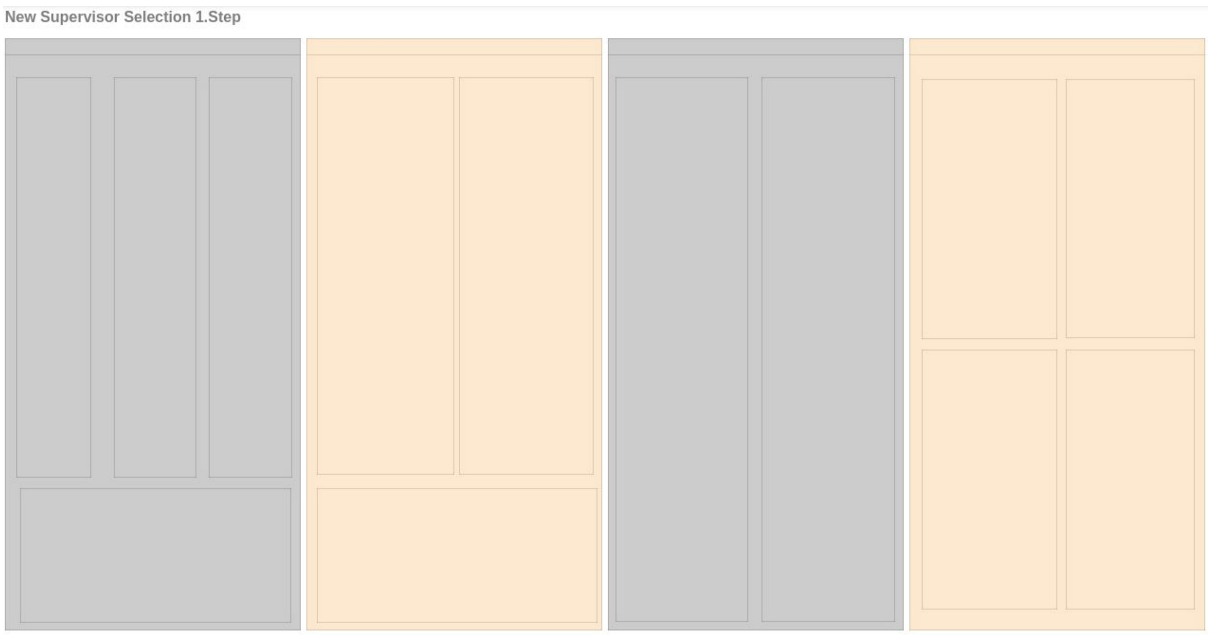
Total Status

Status	Count
available	1
notanswering	3

Creating the Custom Supervisor Screen

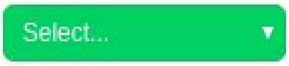
Used to create a custom supervisor screen according to the supervisor's visual and metric-based needs.

1. In the top right section of the supervisor screen, click the  button, the following screen will appear:



This screen provides four different ways to organize the supervisor's desired data.

2. Select the desired pane. The following screen will appear (For this example the first pane was selected):

3. Select the  . The following dropdown menu will appear:

4. Select the desired metrics for the section.

Note: Once a metric selection is made, it cannot be selected again for a different section within the pane. If desired, it can be deselected by clicking the  *button located to the far right of the metric's name. To assist in not making a duplicate selection, if the parameter has been selected, it will be shown in red on the dropdown menu. An example is shown below:*

Note: Queue Performance was selected for a different section within the pane and is highlighted in red to notify the supervisor.

5. Repeat step 4 for all of the sections within the pane.
6. Once all of the desired selections have been made, click the "Complete" button, 

. The custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the "Default Supervisor" button, 
.

Editing the Custom Supervisor Screen

1. In the top right section of the supervisor screen, click the button, the custom supervisor screen will appear.
2. In the top right section of the custom supervisor screen, click the "Update Supervisor" button, , the custom supervisor screen will appear (using the previously selected pane).

Note: To change the pane view, simply click the "Back" button, Back .

3. Make the desired changes.
4. Once all of the desired selections have been made, click the "Complete" button, Complete . The updated custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the "Default Supervisor" button, .