



**ORENCLOUD**

DIALLER V214

# **AGENT MANUAL**

**OCdialler powered by Vicedial**

**By ORENCloud**

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## **INTRODUCTION**

This manual is meant as a resource for Call Center Agents and Managers to help them to better understand how the OCDialler web client works, and to learn how to use all of it's features correctly as well as answer questions as to why things work the way they do within the OCDialler Call Center Suite.

### ***What is OCDialler®?***

Simply put, OCDialler is a contact center software package that sends calls, emails and/or chat messages to an agent and allows an agent to place calls. It can run in an inbound, outbound (as predictive or manual dialing) or blended capacity (handling inbound and outbound calls in the same agent session) as well as those same agents also handling inbound email and chat messages from customers. There is also the ability to allow for Interactive Voice Response (IVR) applications interacting with customers' calls.

### ***How does the agent screen work?***

The OCDialler agent screen is basically an interactive web page. It allows the agent to interface with the system during the process of a call and do things such as add or modify information about the customer, conference in other parties, transfer the call, record and many other functions necessary in a call center. The OCDialler agent screen is available fully translated in English and Spanish, and partially translated in French, German, Italian, Portuguese, Brazilian Portuguese, Greek, Polish, Slovak, Russian, Dutch, Traditional Chinese, Swedish, Danish and Japanese. The next few chapters will go over how to operate as a contact center agent within OCDialler and will go into detail about how all of the agent features work.

### ***What's new since the last Agent Manual release?***

We have not added many new features that are visible in the OCDialler agent screen since the last version of this manual was released one year ago, although we have added several new features on the back-end of OCDialler, as well as many small bug fixes to allow the agent screen to operate more smoothly. The one optional visible feature that has been added to the agent screen is the “Confetti display” feature, but more about that later.

# OVERVIEW OF AGENT CLIENT-SCREEN FUNCTIONS

## UNIVERSAL FEATURES

First we will go over the features that are accessible for all OCDialler users, whether predictive, manual dialing or inbound campaigns.



Figure 1. OCDialler Agent/Phone Login Screen

## PROPER LOGIN AND LOGOUT PROCEDURES

Depending on how your Manager has set up the OCDialler web link, you may be opening a web browser and clicking on a bookmark, or you may have an icon that you can click on on your desktop that says OCDialler. Open up OCDialler and you will see the login screen (see Figure 1). If you have a login for your phone first (it will show "Phone Login" and "Phone Password" fields) then enter the values in that your manager gave you for those fields.

Then you will see the "User Login", "User Password" and "Campaign" fields in the form for you to fill out. Once these fields are filled in and your campaign selected, click on the "SUBMIT" button to login. Your manager may also have given you the ability to choose the language that the agent screen will use. That option would be shown below the Campaign select menu.

There is also a "Timeclock" link in the top left corner of your screen. This takes you to a timeclock punch-in/punch-out screen which we will discuss later in this manual.

After you click SUBMIT, your phone should ring (unless you are dialing into the system, using an integrated web phone or you have been designated as an "on-hook" agent). Pick the phone up (or answer it if you are using a soft-phone on your computer). When you answer the phone, you'll hear the system announce, "you are the only person in this conference" indicating the connection is successful. From now on you should not hang up your phone unless you log out of OCDialler.

If your phone does not ring and you do not see the active screen, then something is wrong. There are two messages that may appear on your screen: There are no leads in the hopper for this campaign, or you may see an error message in the campaign pull-down message. If there are no leads in the hopper, tell your manager, if you see an ERROR message then you should double-check your login and password and try logging in again.

At this point you are logged in to OCDialler (see Figure 3) and you are PAUSED. Most of the buttons

on the left side will not be activated until you are on a call, you may also see a INBOUND GROUP selection screen and/or a TERRITORIES selection screen, both of which we will discuss further on in the manual. At the top of your screen you will see the ID of the phone you are currently connected through, as well as your user ID and name.

Below that can be several tabs for SCRIPT, custom fields FORM, EMAIL, INTERNAL CHAT and CUSTOMER CHAT, then a clock showing the current system time and your session ID, which you may need to reference later. Further below that, in the gray section, is the Status line which will show important information as calls are placed and received.

Towards the bottom, below the Comments section, on the left side, you may see your dialing status and a count of the calls being dialed in your campaign at this moment as well as the number of dialable leads in your campaign (This is only useful in outbound dialing modes and may not appear on every screen). On the right side there may be a link to active Agent-only callbacks, if enabled. Next to that, you may see an ENTER A PAUSE CODE link.

Below these you may see links to manually dial a customer (MANUAL DIAL and FAST DIAL) with a MUTE button on the far right. Below this is a small line of type that shows you the software version and build date as well as the address of the OCDialler server that you are connected to.

At the bottom is a link to show the calls that are in your session. Clicking this link toggles the display on and off. There are also similar links to show you Agent View (status of other agents on your system) and Calls In Queue View (shows the inbound calls in queue that you are able to take)

Farther on the right at the bottom is where the HOT KEYS activation section will appear if your campaign has Hot Keys activated.

**NOTE:** If your manager has set your user login to reset its password, you will see the following screen before you are allowed to log in completely. Your system may have a minimum password length requirement, and you are not allowed to keep your password the same. Also, passwords can only contain letters and numbers(no special characters), but they can be up to 100 characters in length(the longer your password is, the more secure it is).

**VICIdial** You are required to change your password. Please enter a new password below

Note: Passwords may be up to 100 characters in length, and you may only use letters and numbers in your password.

New Password:

Confirm New Password:

SUBMIT

VERSION: 2.14-834c BUILD: 210421-2110

**Figure 2. OCDialler Agent forced change-password Screen**

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT

2018-11-17 07:49:23 session ID: 8800051  
Calls in Queue: 0 Emails in Queue: 0 NO LIVE CALL

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER

STATUS: seconds:

**YOU ARE PAUSED** Customer Time: Channel:

Next Call Pause  
RECORDING FILE:

RECORD ID:  
**START RECORDING**

WEB FORM  
WEB FORM 2  
WEB FORM 3

PARK CALL  
IVR PARK CALL  
TRANSFER - CONF  
QUICK TRANSFER  
CUSTOM TRANSFER  
RE-QUEUE CALL

HANGUP CUSTOMER

SEND DTMF

Customer Information: [LEAD SEARCH](#)

Title: First: MI: Last:

Address1:  
Address2: Address3:

City: State: PostCode:

Province: Vendor ID: Gender: U - Undefined

Phone: DialCode: Alt. Phone:

Show: Email:

Entry Date: Last Call:

Comments:  
-History-

Call Notes:  
[view notes](#)

Dialable Leads: 19789  
[NO ACTIVE CALLBACKS](#) [ENTER A PAUSE CODE](#)  
[MANUAL DIAL](#) [FAST DIAL](#) [VIEW CALL LOG](#)

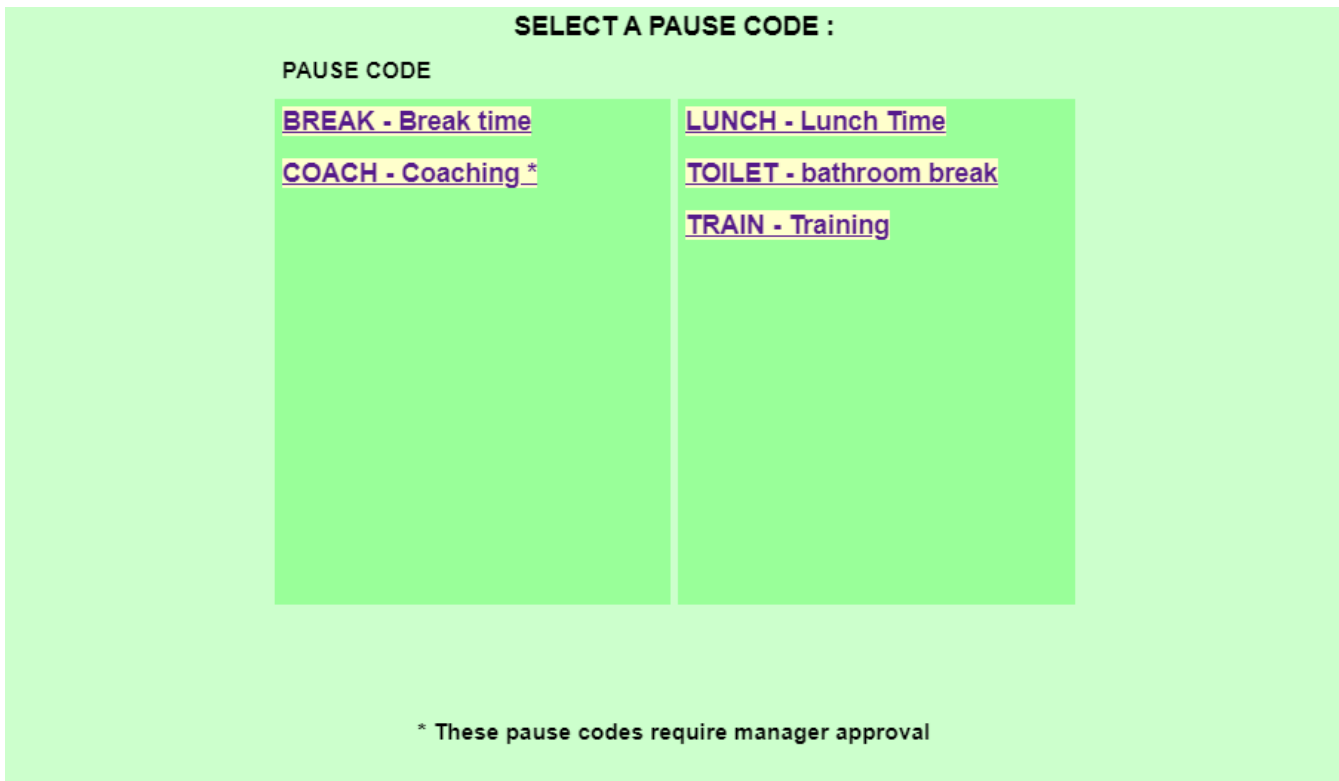
VERSION: 2.12-500c BUILD: 181108-2221 Server: 192.168.198.5  
[Show conference call channel information](#) [Hide Calls In Queue](#) **HOT KEYS INACTIVE** [Agents View +](#)

PHONE	FULL NAME	WAIT	AGENT	CALL GROUP	TYPE
Calls In Queue:					

**Figure 3. OCDialler Agent YOU ARE PAUSED**

If you are in Manual dial mode you will see a “Dial Next Number” button in place of the YOU ARE PAUSED or YOU ARE ACTIVE buttons (these show up in auto-dial, inbound and blended modes). These are found in the top left corner of the gray section (In INBOUND-MAN mode you will have both a Dial-Next-Number button and active/paused buttons). In this mode you may also see a check box to enable you to preview leads before dialing them (This is unavailable in auto-dial mode). In either dialing mode you may also see a check box below these buttons that allows you to dial alternate numbers if your manager has enabled that feature on the campaign you are currently logged into. To begin taking calls in Auto-dial and INBOUND-MAN modes you will need to click on the YOU ARE PAUSED button. This alerts the system that you are ready and available to take calls. Once the dialer connects a customer call with you, you'll hear a short “Bloop” sound, and then the customer is on the line. In MANUAL DIAL mode, click the “Dial Next Number” button to trigger the system to call the next lead.





**Figure 4. Selecting a Pause Code**

## Pause Codes

When you go on a break, your manager may want you to remain logged-in to the dialer, and simply go into PAUSE mode. This allows you to use a PAUSE CODE to show what kind of break you are on. To select a PAUSE CODE, just click on the text link below the Comments field labeled “ENTER A PAUSE CODE” and a screen will appear with choices of Pause Codes to enter for your Pause time (see Figure 4). Just click on one to select it, and you will immediately go back to the main screen.

Even if you do not use a specific Pause Code, you should stay logged-in to the dialer in PAUSE mode until you start calling again, after your break has ended. Make sure to not hang up your phone at this time. A manager can also set pause code selection to be mandatory for every pause time you have. If there is an asterisk(\*) next to the pause code, then a manager will have to authorize this pause code selection by going to your computer and entering a code to allow you to enter this pause code.

## Logging Out

When you are done with your shift, click on the "LOGOUT" button in the upper right corner of the OCDialler screen. This will hangup your phone and show you a re-login link. If you click on the re-login link, all of the login information that you entered when you logged-in will show up on the screen and you can just click "SUBMIT" to log in again without having to fill it all in again.

**NOTE:** At NO TIME should you press the BACK or FORWARD buttons in your web browser, this may log you out without you knowing. Also, DO NOT close your browser with the "X" at the top of the window or browser tab. That may lead to your session not ending properly, you may not be logged out and may result in your losing clocked-in time on your OCDialler time-sheet.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT  
 2016-11-17 08:18:01 session ID: 8000051  
 Calls in Queue: 0 Emails in Queue: 0 **LIVE CALL**

STATUS: Called: 999-888-7112 UID: M1170817520001237988 List: 82106 seconds: 8 refresh

**test training May 2010 script**

Hello Mr. O'Reilly, this is Admin. We are calling people in the Springfield area with a great offer. Are you interested in ACME Widgets?

Customer Phone Number: 9998887112  
 Customer name: Bobby O'Reilly  
 address1: 1234 Main St.  
 city: Springfield  
 state: IL  
 zip: 60032

RECORD ID: CALL COUNT: 63  
 START RECORDING NOTES:

WEB FORM  
 WEB FORM 2  
 WEB FORM 3

PARK CALL  
 IVR PARK CALL  
 TRANSFER - CONF  
 QUICK TRANSFER  
 CUSTOM TRANSFER  
 RE-QUEUE CALL

HANGUP CUSTOMER  
 SEND DTMF

CALL LOG FOR THIS LEAD:

#	DATE/TIME	AGENT	LENGTH	STATUS	PHONE	CAMPAIGN	IN/OUT	ALT	HANGUP
1	2016-01-20 11:05:05	4545 - 4545 with a really long name	23	RQXFER	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
2	2016-01-20 11:05:29	4545 - 4545 with a really long name	60	RQXFER	1 9998887112	AGENTDIRECT		IN MAIN	AGENT
3	2016-01-20 11:06:29	4545 - 4545 with a really long name	26	XGH	1 9998887112	AGENTDIRECT		IN MAIN	AGENT
NOTES: notes go here									
4	2016-01-20 22:11:25	6666 - Admin	88	NI	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
NOTES: notes here									
5	2016-01-27 06:19:58	6666 - Admin	597	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	CALLER
6	2016-01-27 06:45:29	6666 - Admin	57	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
7	2016-01-31 20:43:04	6666 - Admin	46	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
8	2016-01-31 21:15:09	6666 - Admin	11	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
9	2016-02-01 10:11:37	6666 - Admin	8	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
10	2016-02-10 15:45:06	6666 - Admin	16	CBTEST	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
NOTES: notes go here									
11	2016-02-10 15:46:27	6666 - Admin	10	CBTEST	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
12	2016-02-24 10:46:56	6666 - Admin	18	XGH	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
13	2016-02-24 10:49:58	6666 - Admin	18	XGH	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT

VERSION: 2.12-500c BUILD: 161108-2221 Server: 192.168.198.5 NO ACTIVE CALLBACKS  
 Show conference call channel information Hide Calls In Queue HOT KEYS INACTIVE MUTE Agents View +

Figure 5. OCDialler Script Tab

## SCRIPT TAB

When you login to OCDialler you will see several tabs at the top, left corner of the screen. The OCDialler Main tab is farthest to the left, followed by the SCRIPT tab, and an optional SCRIPT 2 tab. OCDialler is the main screen that shows all customer information in the system as well as a call timer, the name of the line your call is connected on and the local time where your customer is located. The SCRIPT tab's purpose is to show the agent a script to read with the customer's information put into the script or to open a website inside the SCRIPT tab that may show your company's CRM or ordering system. Your manager can define that the customer's name, address and other information are automatically put into the script for each call (see Figure 5). If it is set up by your manager, the SCRIPT tab may pop up when a call comes to you, otherwise you can get to the SCRIPT tab by just clicking on the tab portion at the top of your screen and you can go back to the main OCDialler screen by clicking on the OCDialler tab at the top to the left of the SCRIPT tab.

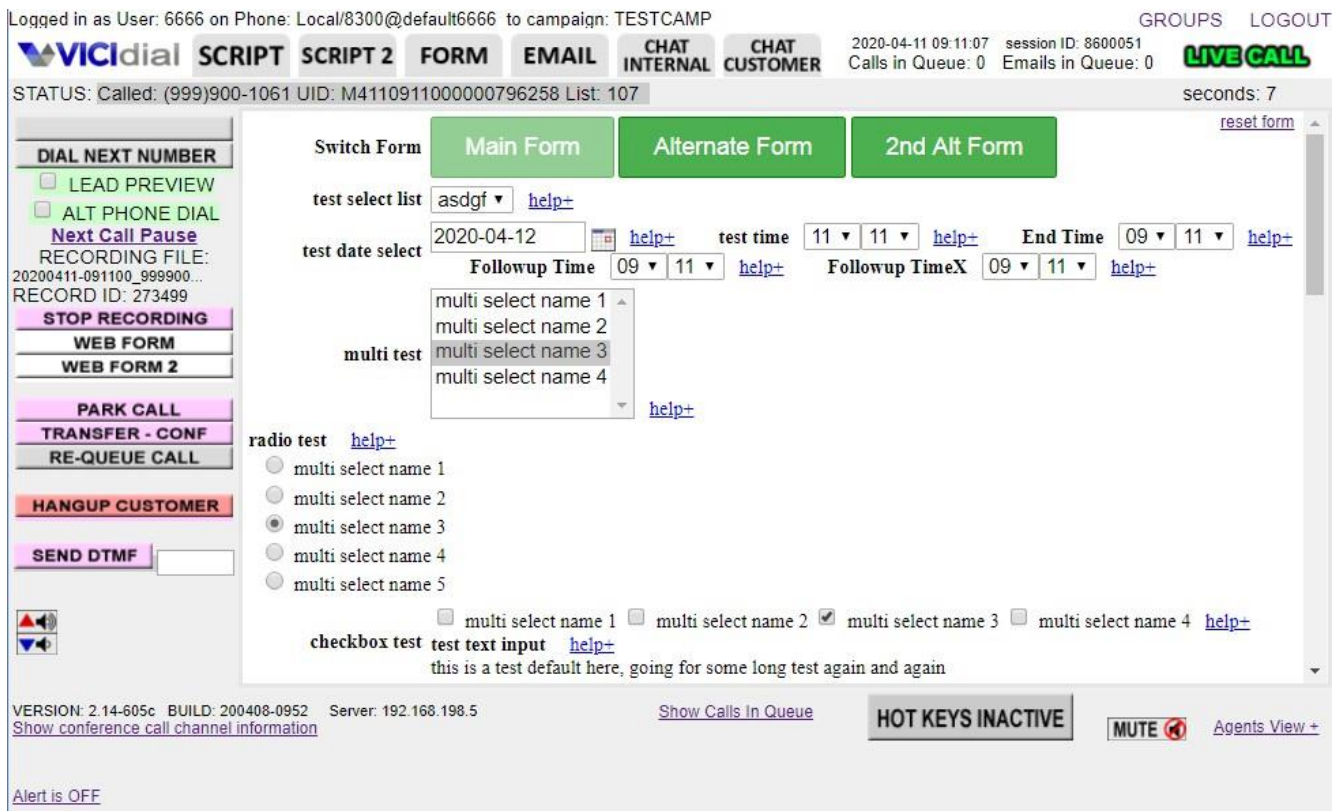


Figure 6. OCdialler Form Tab

## FORM TAB

When a customer's lead is presented from a list that contains Custom Fields, the FORM tab will appear. It's found just to the right of the SCRIPT tab, at the top of the agent's screen. The FORM tab's purpose is to display all of the Custom Fields created for this lead. Your manager will have created the fields for 2 reasons. They can pre-load the Custom Fields with detailed data about the customer not contained on the MAIN tab. Custom Fields can also be used to prompt you to ask the customer specific questions, while allowing you to retain their answers. The Custom Field types consist of either multiple choice selections, or text boxes for open ended questions. Your manager can also provide brief instructions for each field, which can be accessed by clicking the "help" link beside the field. Your manager may have also configured the ability to switch forms within the FORM tab, giving you another set of fields to use while on the same phone call.

There are three new types of custom fields functions that have been added recently:

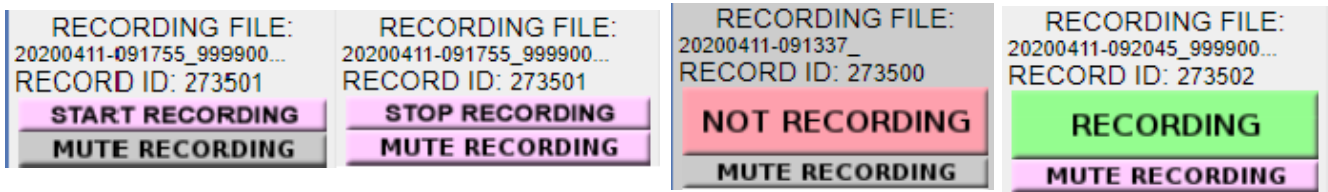
1. Formula calculations(Figure 7), values from the two entry fields above are used to calculate the yearly price difference between two different monthly payment rates.
2. Save Button(Figure 7), this button can save any changes you have made on the form and reload the entire FORM tab with your changes staying in place.
3. Auto-refreshing pull-down menus(Figure 8), these menus will automatically refresh when a 'source' field has been changed, to show a different set of menu options when a different source value is used. These can be cascading to several levels of menus if your manager has configured them to do so.

Old Monthly Payment	<input type="text" value="1252"/>	New Monthly Payment	<input type="text" value="1123"/>
Yearly Payment Difference: $((1252 * 12) - (1123 * 12)) = 1548$			
Save Button	<input type="button" value="Commit Changes and Refresh Form Now"/>		

Figure 7. OCDialler Form Tab, Custom fields formula calculations and Save Button

Utility Region	<input type="text" value="1 Ontario"/>
Rate Choice	<input type="text" value="12 month: 0.0749,0.0749"/>
Bill Start Month	<input type="text" value="March"/>
Bill Period	<input type="text" value="Refreshing..."/>

Figure 8. OCDialler Form Tab, Custom fields menus auto-refreshing upon change



**Figure 9. Recording buttons**

## **CALL RECORDING**

The first button below your green call control buttons ("Dial Next Number", "YOU ARE PAUSED", "YOU ARE ACTIVE") is the "START RECORDING"(or "NOT RECORDING") button. This button will initiate an audio recording of your session. If your campaign is set up to do so, recording may be started at the beginning of every call you receive automatically without you needing to start it. This button may also be disabled if your manager has defined that in the campaign.

Above the recording button you will see the filename of the recording which may contain things like the time, your ID number, the customer's phone number or other information. Also, the system recording ID will be displayed above the recording button. You may want to keep track of this number because it is the easiest way to retrieve the recording in the future if needed.

Below the "START RECORDING" button, you may see a "MUTE RECORDING" button. This button will allow you to temporarily pause the recording of the call and then resume it without starting a new recording file. The mute recording feature is not available on all systems.

## **WEB FORM**

This button will take all of the information about the call and the customer and send it to a new web browser window that has been set by the manager for this campaign. This allows for such things as the easy lookup of a customer's information in a company database or even a longer sales or survey form that can contain many fields. Your manager can also set the web form to open automatically when a new call arrives at your session. There are also options for second and third web form buttons that go to different webpages if your manager has enabled them.

## **CRM POPUP LOGIN**

This feature pops open a new window as soon as you first log into the campaign, directing you to the accompanying CRM login page. It allows you to quickly login to the CRM while the dialer loads the agent window. This saves additional steps and ensures that when you are ready to take calls both systems will be available to you. This is an optional feature that is enabled by your manager. If this has been set for your campaign, make sure you do not have "popup blockers" enabled on your web browser, or it will not work correctly.



Figure 10. Park Call Buttons

## ***PARK CALL***

Below the WEBFORM button is the PARK CALL button which allows you to send a customer that is in your session to a music-on-hold waiting area. Once you send the customer to park you can retrieve them by clicking on the button again. This park call feature can be set to a custom message by your manager if a pre-recorded message has been setup for this campaign. While a call is parked, you will see a timer above the “PARK CALL” button that will show you how long the call has been parked.

## ***IVR PARK CALL***

The next button is the optional “IVR PARK CALL” button and it allows you to send a customer that is in your session to an IVR to collect information from them, after which they will automatically be sent back to your session. Once you send the customer to the IVR, you can retrieve them by clicking on the button again. The IVR park feature must be set up by a System Administrator.



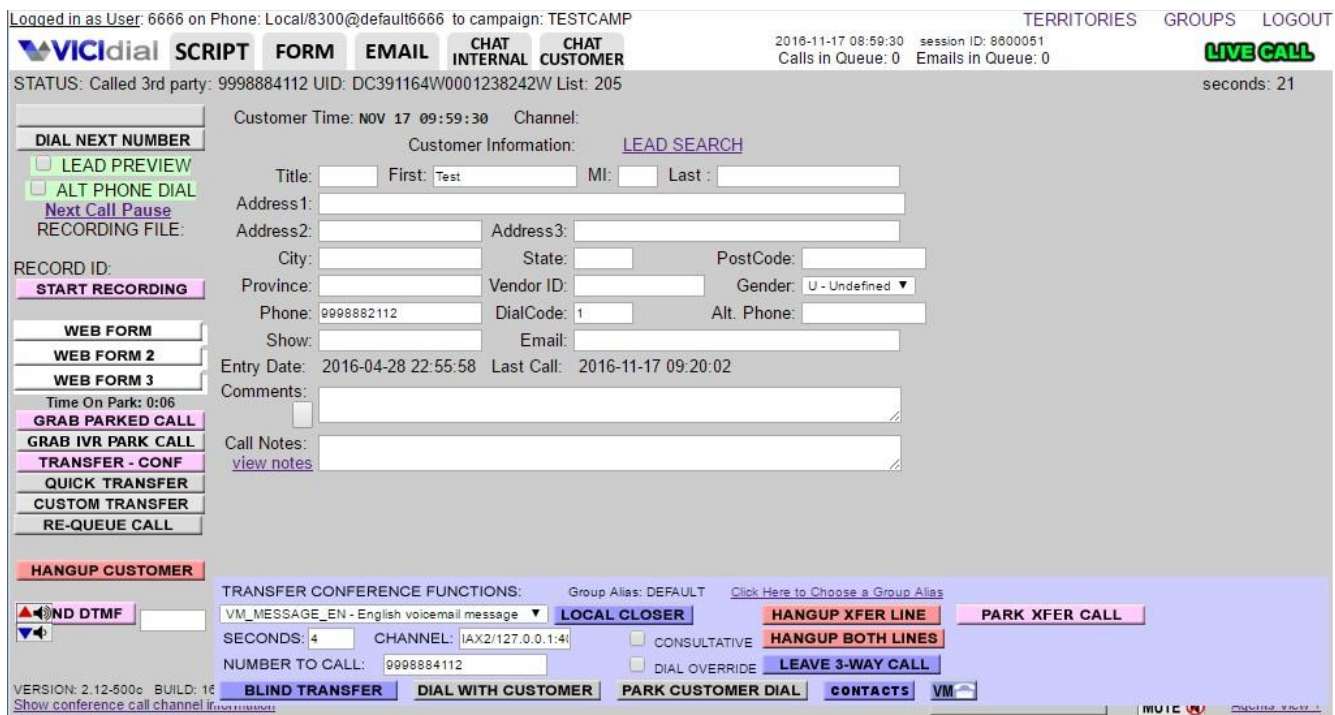


Figure 11. OCdialler Transfer Conference

## TRANSFER CONFERENCE

This button opens a blue form that allows the agent to transfer the call or add a third party (see Figure 11). There are 9 different kinds of conferences and transfers, 4 agent to agent, 4 agent to outside line, and Quick Transfer (which works for both). They are each explained below, by type. Once a conference has been created, you can exit it in one of 3 possible ways (indicated by 3 large buttons on the bottom right of your agent screen).

## HANGUP XFER LINE

This button disconnects the conference, and leaves you and the customer still connected.

## PARK XFER CALL

This optional button works just like the PARK CALL button for customers, except it only affects the 3-way call.

## HANGUP BOTH LINES

This button disconnects everyone from the conference.

## LEAVE 3-WAY CALL

This button allows you to drop from the conference leaving the customer and the other party still connected.

## TRANSFER CONFERENCE TYPES

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT  
VICIdial SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER 2017-01-03 15:22:58 session ID: 8800051  
Calls in Queue: 0 Emails in Queue: 0 LIVE CALL  
STATUS: Called: 999-888-7112 UID: M1031522420001237988 List: 82106 seconds: 16

**DIAL NEXT NUMBER** Customer Time: JAN 03 15:22:58 Channel: IAX2/127.0.0.1:40569-3448  
 LEAD PREVIEW Customer Information: LEAD SEARCH  
 ALT PHONE DIAL  
Next Call Pause  
RECORDING FILE:  
RECORD ID:  
**START RECORDING**  
Title: Mr. First: Bobby MI: L Last: O'Reilly  
Address1: 1234 Main St.  
Address2: hello Address3:  
City: Springfield State: IL PostCode: 60032  
Province: Vendor ID: Gender: U - Undefined  
Phone: 9998887112 DialCode: 1 Alt. Phone: 9998882112  
Email:  
20 10:34:17 Last Call: 2017-01-03 15:22:20  
2018-10-19 21:50:07  
PARK CALL  
IVR PARK CALL  
**TRANSFER - CONF**  
QUICK TRANSFER  
CUSTOM TRANSFER  
RE-QUEUE CALL

**Step 1**

**Step 2**

**Step 3**

TRANSFER CONFERENCE FUNCTIONS: Group Alias: DEFAULT Choose a Group Alias  
TEST\_IN - TEST inbound LOCAL CLOSER HANGUP XFER LINE PARK XFER CALL  
SECONDS: CHANNEL: CONSULTATIVE HANGUP BOTH LINES  
NUMBER TO CALL: DIAL OVERRIDE LEAVE 3-WAY CALL  
BLIND TRANSFER DIAL WITH CUSTOMER PARK CUSTOMER DIAL CONTACTS VM

VERSION: 2.14-506a BUILD: 16  
Show conference call channel

Figure 12. OCdialler Agent to Agent, Blind Transfer Diagram

### Agent to Agent, Blind Transfer

When you want to immediately send the call over to an agent or In-group, without notifying the recipient or staying on the line with the customer.

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Select the In-group in the pulldown select list
3. Click the “LOCAL CLOSER” button to send the call



Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT  
 2017-01-03 15:22:58 session ID: 8600051  
 Calls in Queue: 0 Emails in Queue: 0 **LIVE CALL**

STATUS: Called: 999-888-7112 UID: M1031522420001237988 List: 82106 seconds: 16

**DIAL NEXT NUMBER** Customer Time: JAN 03 15:22:58 Channel: IAX2/127.0.0.1:40569-3448

LEAD PREVIEW  
 ALT PHONE DIAL  
 Next Call Pause  
 RECORDING FILE:

RECORD ID:  
**START RECORDING**

**WEB FORM**  
**WEB FORM 2**  
**WEB FORM 3**

**PARK CALL**  
**IVR PARK CALL**  
**TRANSFER - CONF**  
**QUICK TRANSFER**  
**CUSTOM TRANSFER**  
**RE-QUEUE CALL**

Customer Information: [LEAD SEARCH](#)

Title: Mr. First: Bobby MI: L Last: O'Reilly  
 Address1: 1234 Main St.  
 Address2: hello Address3:  
 City: Springfield State: IL PostCode: 60032  
 Province: Vendor ID: Gender: U - Undefined  
 Phone: 9998887112 DialCode: 1 Alt. Phone: 9998882112  
 Email:  
 20 10:34:17 Last Call: 2017-01-03 15:22:20

2018-10-18 21:50:07  
 res:  
 view notes

**Step 1** (points to TRANSFER - CONF)

**Step 2** (points to TEST\_IN - TEST inbound)

**Step 3** (points to CONSULTATIVE)

**Step 4** (points to DIAL WITH CUSTOMER)

**Step 5** (points to LEAVE 3-WAY CALL)

TRANSFER CONFERENCE  
 TEST\_IN - TEST inbound LOCAL  
 HANG UP LINE PARK XFER CALL  
 HANG UP BOTH LINES  
 LEAVE 3-WAY CALL  
 BLIND TRANSFER DIAL WITH CUSTOMER PARK CUSTOMER DIAL CONTACTS VM

VERSION: 2.14-508e BUILD: 16  
 Show conference call channel

Figure 13. OCdialler Agent to Agent, Consultative Transfer Diagram

## Agent to Agent, Consultative Transfer

When you want to transfer or conference a call to another agent or In-group, while you and the customer wait together. You can converse with the customer while waiting for the agent or In-group to pick up. When they do, all 3 of you will be on the line together.

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Select the In-group in the pulldown select list
3. Select the “CONSULTATIVE” box
4. Click the “DIAL WITH CUSTOMER” button to send the call
5. Click the “LEAVE 3WAY CALL” button to leave the customer and the third party talking together while you move on to disposition your call, or you can hang-up the call

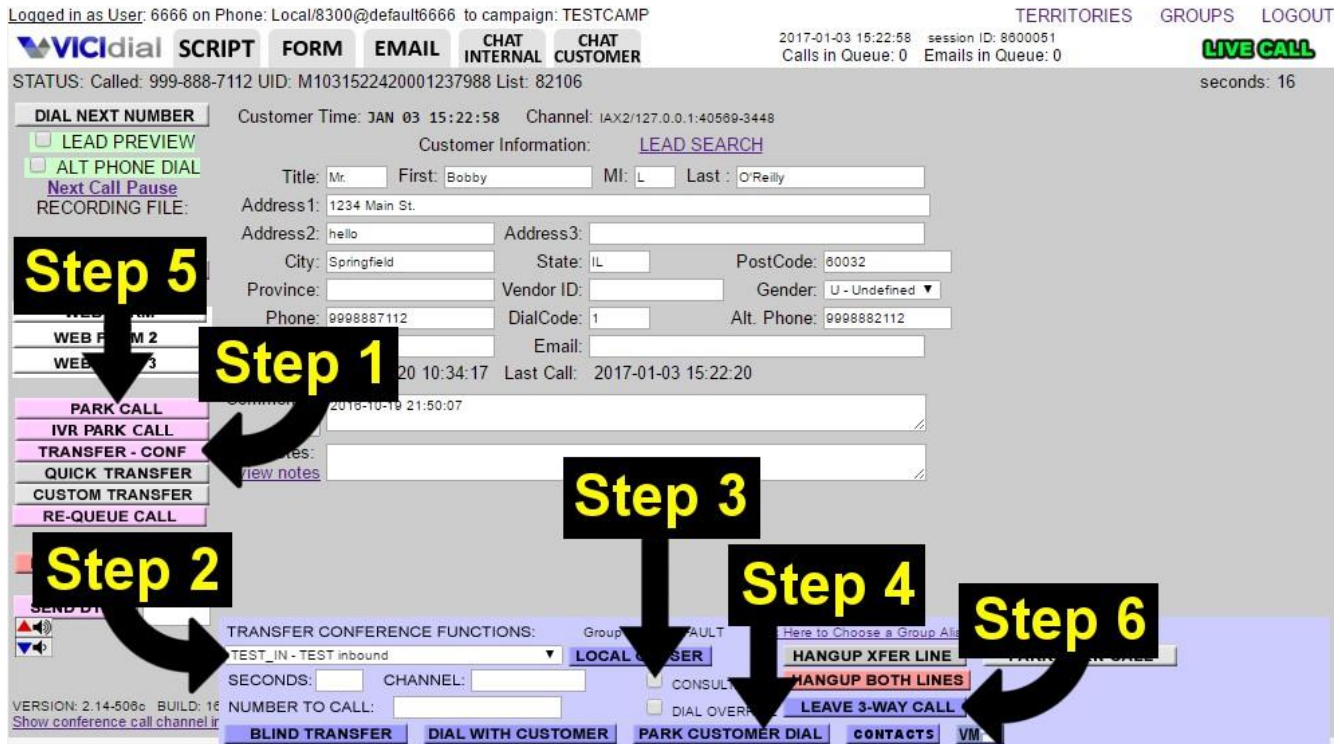


Figure 14. OCdialler Agent to Agent, Parked Transfer Diagram

## Agent to Agent, Parked Transfer

When you want to transfer or conference a call to another agent or In-group, but you wish to talk to them privately without the customer being on the line. This allows you to place the call while the customer is on hold and speak with the other agent as long as you like before bringing the customer back on the line with all 3 of you.

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Select the In-group in the pulldown select list
3. Select the “CONSULTATIVE” box
4. Click on the “PARK CUSTOMER DIAL” button on the left side, at the bottom of the Transfer Conference frame. This will both park the customer's call and initiate the consultative transfer to the selected In-group.
5. You can bring the customer back by clicking the “GRAB PARKED CALL” button (this was labeled as the “PARK CALL” button prior to the Agent selecting “PARK CUSTOMER DIAL”)
6. Click the “LEAVE 3WAY CALL” button to leave the customer and the third party talking together while you move on to disposition your call, or you can hang-up the call

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP

TERRITORIES GROUPS LOGOUT

VICIdial SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER

2017-01-03 15:22:58 session ID: 8600051  
Calls in Queue: 0 Emails in Queue: 0

**LIVE CALL**

STATUS: Called: 999-888-7112 UID: M1031522420001237988 List: 82106 seconds: 16

**DIAL NEXT NUMBER** Customer Time: JAN 03 15:22:58 Channel: IAX2/127.0.0.1:40569-3448

LEAD PREVIEW  
 ALT PHONE DIAL  
Next Call Pause  
RECORDING FILE:

RECORD ID:  
**START RECORDING**

**WEB FORM**  
**WEB FORM 2**  
**WEB FORM 3**

Customer Information: [LEAD SEARCH](#)

Title: Mr. First: Bobby MI: L Last: O'Reilly  
Address1: 1234 Main St.  
Address2: hello Address3:  
City: Springfield State: IL PostCode: 60032  
Province: Vendor ID: Gender: U - Undefined  
Phone: 9998887112 DialCode: 1 Alt. Phone: 9998882112  
Show: 83106 Email:  
Entry Date: 2016-01-20 10:34:17 Last Call: 2017-01-03 15:22:20

**PARK CALL** 21:50:07  
**IVR PARK CALL**  
**TRANSFER - CONF**  
**QUICK TRANSFER** [VIEW IT](#)  
**CUSTOM TRANSFER**  
**RE-QUEUE CALL**

**HANGUP CUSTOMER**

**SEND DTMF**

TRANSFER CONFERENCE FUNCTIONS: Group Alias: DEFAULT [Click Here to Choose a Group Alias](#)

TEST\_IN - TEST inbound LOCAL CLOSER HANGUP XFER LINE PARK XFER CALL  
SECONDS: CHANNEL: CONSULTATIVE HANGUP BOTH LINES  
NUMBER TO CALL: DIAL OVERRIDE LEAVE 3-WAY CALL  
BLIND TRANSFER DIAL WITH CUSTOMER PARK CUSTOMER DIAL CONTACTS VM

VERSION: 2.14-506a BUILD: 16  
[Show conference call channel](#)

**Step 1**

Figure 15. OCdialler Transfers, Re-Queue Call Diagram

## Re-Queue Call

This feature needs to be enabled on the campaign. You will have a “RE-QUEUE CALL” button on the left side of your screen just below the “QUICK TRANSFER” button. It allows you to take your current live call and transfer it to an AGENTDIRECT queue for you to answer at a later time. This will send the customer right back to you if you do not pause immediately (the campaign can be set to pause after every call). The purpose of this feature is to allow you the ability to click “GRAB CALL” that is in the “CALLS IN QUEUE” frame at the bottom of the screen.

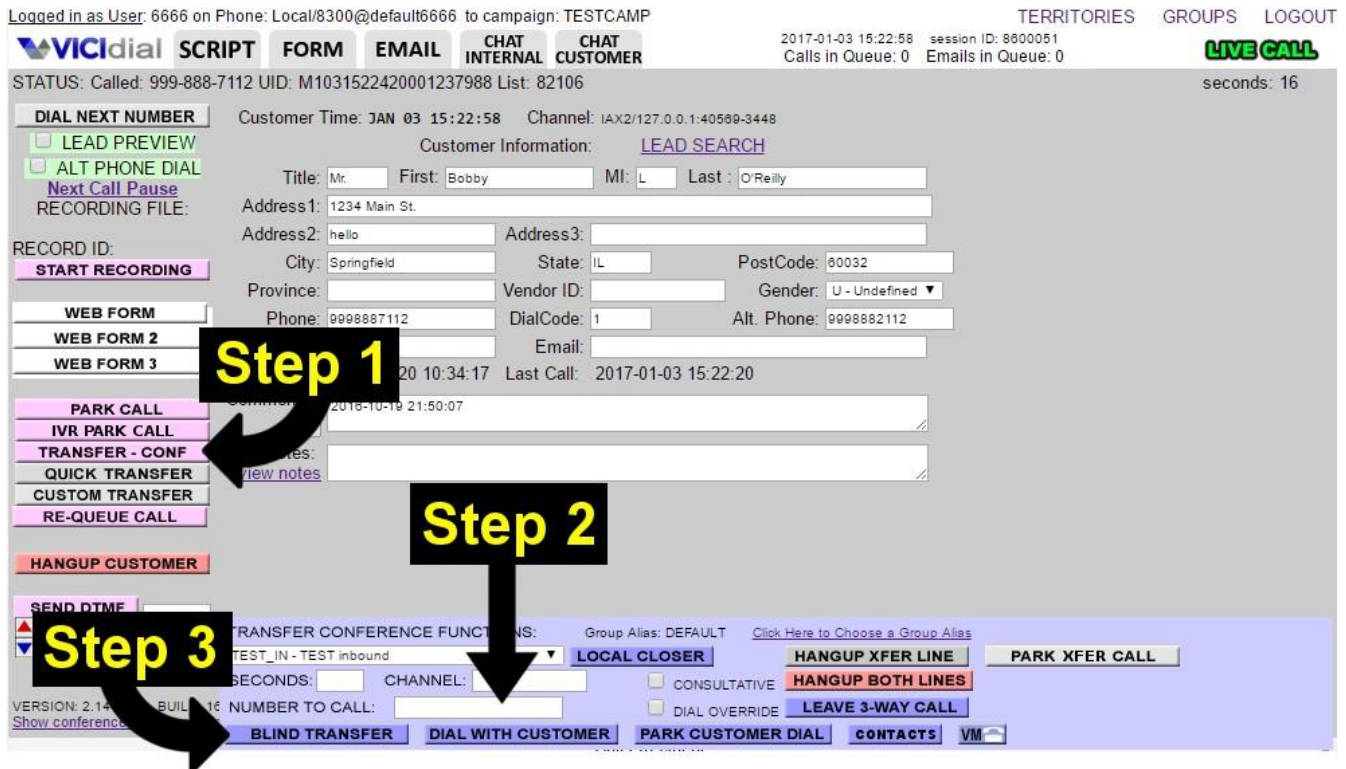


Figure 16. OCDialler Agent to Outside Line, Blind Transfer Diagram

## Agent to Outside Line, Blind Transfer

You want to transfer or conference the call to a phone number (rather than an agent or In-group).

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Enter the phone number in the “NUMBER TO CALL” field
3. Press the “BLIND TRANSFER” button to send the call



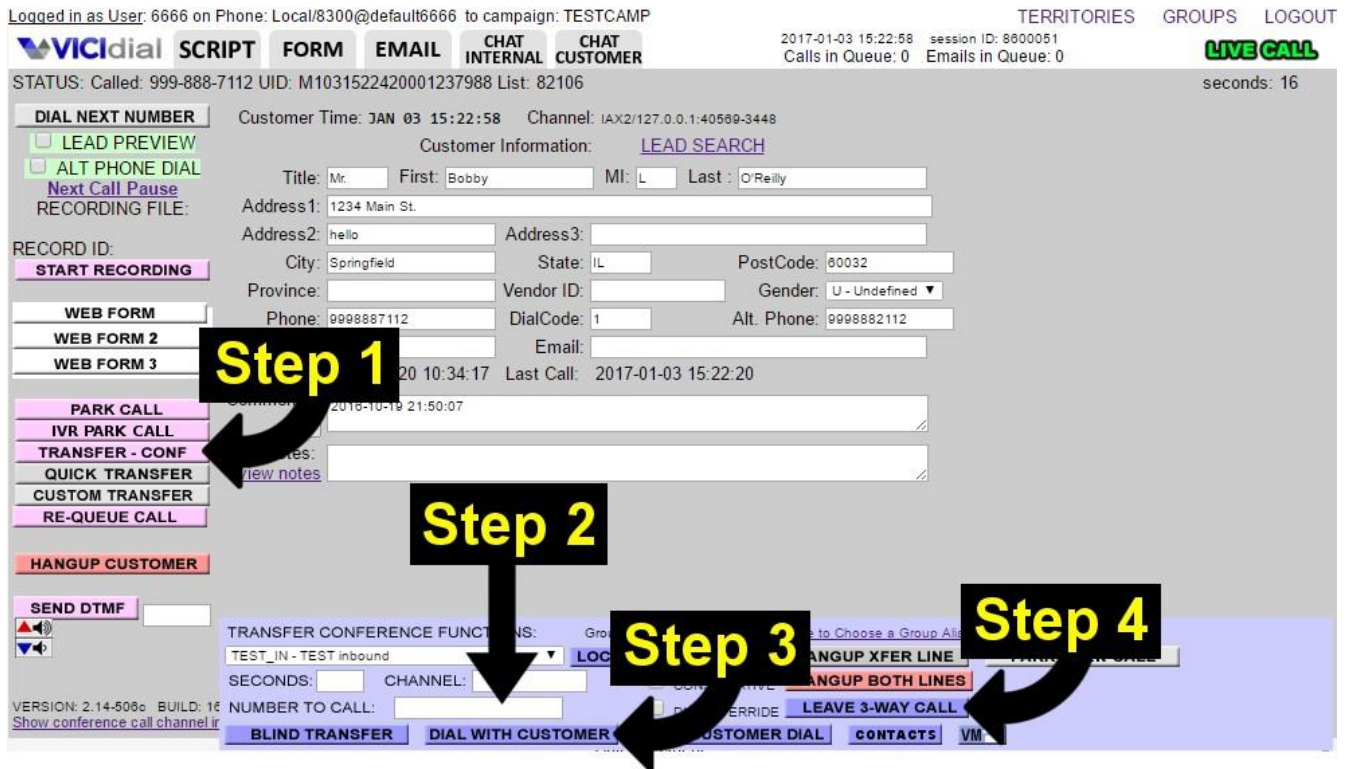


Figure 17. OCDialler Agent to Outside Line, Consultative Transfer Diagram

## Agent to Outside Line, Consultative Transfer

When you want to transfer or conference a call to a phone number (rather than another agent or In-group) while you and the customer are on the line together. You can converse with the customer while waiting for the phone number to pick up. When they do, all 3 of you will be on the line together.

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Enter the DID in the “NUMBER TO CALL” field
3. Press the “DIAL WITH CUSTOMER” button directly below, to place the call.
4. Click the “LEAVE 3WAY CALL” button to leave the customer and the third party talking together while you move on to disposition your call, or you can hang-up the call.

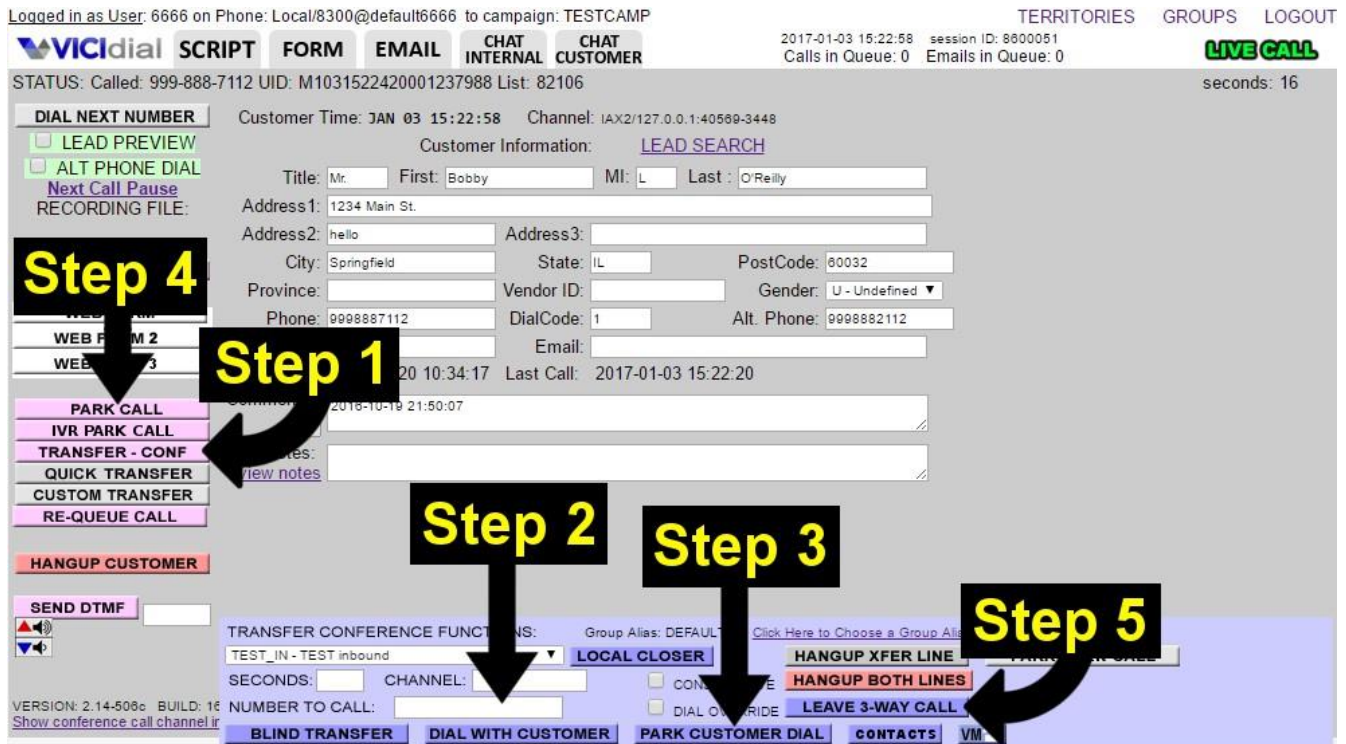


Figure 18. OCIdialler Agent to Outside Line, Park Transfer Diagram

## Agent to Outside Line, Park Customer Transfer

When you want to transfer or conference a call to a phone number (rather than another agent or In-group), but you wish to talk to them privately without the customer being on the line. This allows you to place the call while the customer is hold and speak with the other party as long as you like before bringing the Customer back on the line with all 3 of you.

1. Click the “TRANSFER-CONF” button on the left side agent screen
2. Enter the DID in the “NUMBER TO CALL” field
3. Press the “PARK CUSTOMER DIAL” button (below & to the right). The customer will immediately be put on hold (Park) while the dialer places the call. Once the call completes to the phone number, you can talk to the 3rd party as long as you wish.
4. You can bring the customer back by selecting the “GRAB PARKED CALL” button (this was labeled as the “PARK CALL” button prior to you selecting “PARK CUSTOMER DIAL”)
5. Click the “LEAVE 3WAY CALL” button to leave the customer and the third party talking together while you move on to disposition your call, or you can hang-up the call.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP

TERRITORIES GROUPS LOGOUT

2017-01-03 15:22:58 session ID: 8800051  
Calls in Queue: 0 Emails in Queue: 0

**LIVE CALL**

STATUS: Called: 999-888-7112 UID: M1031522420001237988 List: 82106 seconds: 16

**DIAL NEXT NUMBER** Customer Time: JAN 03 15:22:58 Channel: IAX2/127.0.0.1:40569-3448

LEAD PREVIEW Customer Information: [LEAD SEARCH](#)

ALT PHONE DIAL

Next Call Pause

RECORDING FILE:

RECORD ID:

**START RECORDING**

**WEB FORM**

**WEB FORM 2**

**WEB FORM 3**

**PARK CALL**

**IVR PARK CALL**

**TRANSFER - CONF**

**QUICK TRANSFER**

**CUSTOM TRANSFER**

**RE-QUEUE CALL**

**HANGUP CUSTOMER**

**SEND DTMF**

20 10:34:17 Last Call: 2017-01-03 15:22:20

21:50:07

TRANSFER CONFERENCE FUNCTIONS: Group Alias: DEFAULT [Click Here to Choose a Group Alias](#)

TEST\_IN - TEST inbound LOCAL CLOSER HANGUP XFER LINE PARK XFER CALL

SECONDS: CHANNEL: CONSULTATIVE HANGUP BOTH LINES

NUMBER TO CALL: DIAL OVERRIDE LEAVE 3-WAY CALL

BLIND TRANSFER DIAL WITH CUSTOMER PARK CUSTOMER DIAL CONTACTS VM

VERSION: 2.14-508e BUILD: 16  
[Show conference call channel in](#)



Figure 19. OCDialler Quick Transfer Diagram

## Quick Transfer

This feature needs to be enabled on the campaign. When this is active, there will be a “QUICK TRANSFER” button on the main agent screen, just below the “TRANSFER-CONF” button. This is the only transfer that does not require starting with the “TRANSFER-CONF” button. Your manager has pre-programmed either an In-group or phone number to that button. To initiate this transfer, press the “QUICK TRANSFER” button and the dialer immediately blind transfers the call to the preset location.

Available Agents Transfer:			
2840 - Alexandria	0:03	2825 - Katherine	3:25
2410 - Alexis	8:18	2792 - Lillian	0:20
2283 - Amelia	0:42	2888 - Matize	0:25
2395 - Antiano	0:54	2832 - Michael	0:39
2282 - Arleen	9:24	3313 - Monique	1:20
2816 - Barbara	0:26	2879 - Natasha	1:04
2837 - Bianca	0:39	2813 - Nechelle	0:22
2361 - Bianca	1:09	2320 - Nicole	3:03
2835 - Briana	0:04	2811 - Nicole	3:38
2831 - Casandra	0:04	2010 - Odelmar	0:16
2838 - Christin	0:58	2351 - Ollie	0:34
2890 - Clautilde	0:35	2828 - Patricia	0:01
2885 - Cristopher	1:08	2573 - Patti	2:43
2873 - Delronica	0:36	2891 - Peter	1:14
2393 - Deron	4:24	2101 - Phylis	1:22
2348 - Derrick	6:58	2817 - Shane	0:51
2750 - Elan	0:00	2632 - Shannon	0:04
2578 - Esther	0:35	2454 - Sharnay	0:34
2455 - Froncir	0:35	2842 - Sheena	0:36
2889 - Geehae	0:16	2712 - Shetera	0:12
2347 - Gregory	1:56	2830 - Shirley	2:25
2449 - Harold	0:56	2778 - Shykeria	0:36
2494 - Hilliard	1:02	2531 - Stephane	1:29
2718 - Jacqueline	0:15	2602 - Tameka	0:57
2872 - Jane	0:41	2777 - Terrance	0:37
2447 - Janine	0:54	2681 - Tineba	0:51
2881 - Jeramey	0:03	2525 - Tommie	14:14
2822 - Jonel	6:19	2871 - Tracie	0:19
2863 - Julia	0:07	2836 - Vernesa	1:56

■ -READY   
 ■ -INCALL   
 ■ -PAUSED

[Close Window](#)

Figure 20. OCDialler AGENTDIRECT Transfers

## AGENTDIRECT Transfers

The AGENTDIRECT transfer is a special type of Agent-to-Agent Transfer. It allows you to transfer (or queue) a call for only one specific agent. If you select an AGENTDIRECT entry from the Local Closer pull-down menu, an “AGENTS” link will appear to the right of the number to call field. You can click on this link to see a list of the available agents that you can send an AGENTDIRECT transfer to. Simply click on one to select it. From here you can either select the CONSULTATIVE checkbox and click “Dial with Customer” for a Consultative Transfer, or click on the “Local Closer” button to send the call as a Blind Transfer (See above for more detail).



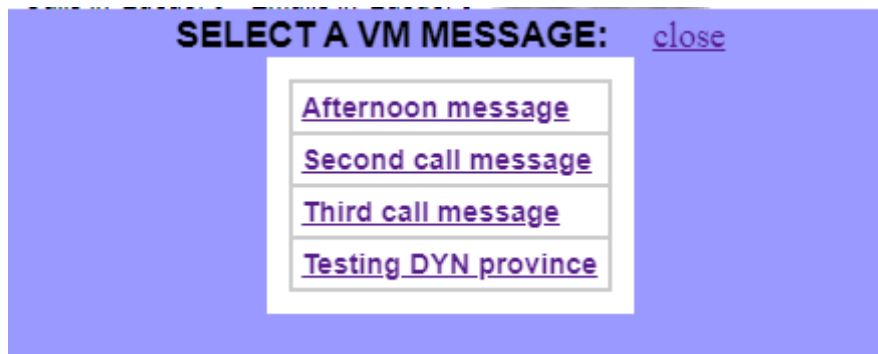


Figure 21. VM Messages Selection Panel

## **VOICEMAIL MESSAGE**

This is an optional feature, set up by your manager. When you reach a voicemail or answering machine, this allows you to send the call to a pre-recorded message specific to your campaign. Open the transfer-conference frame and select the VM button (with a picture of a phone in the lower right side of the transfer frame) to send the call. The pre-recorded message will play for the answering machine or voicemail and you will be sent to the Disposition screen.

Another option related to this feature can allow you to select the message that you want to be played to the customer's voicemail box. This feature will pop open a new panel on your agent screen when you click on the "VM" button and allow you to select the pre-recorded message to be played. The messages in this panel can also be configured based upon the time of day for the customer.

## **PRESETS - DTMF and NUMBER to CALL**

If your campaign is set up for it, you may have up to two presets in the Transfer-Conf frame for filling in the "Send DTMF" and "Number to Call" fields. These presets are small text links in the middle row of the Transfer-Conf frame on the far right that are labeled "D1" through "D5". When clicked, they will fill in values in the "Send DTMF" field and/or the "Number to Call" field.

## **SENDING DTMF DIGITS**

Because of how OCDialler is setup, DTMF digits (the sound a key-press makes on your phone) are sometimes blocked from being played to other callers in your session. To send these DTMF digits you will need to enter them into the field next to the "SEND DTMF" button. If you want to add a pause between digits just add a comma ",". For multiple pauses just add more commas in a row.

**SELECT A PRESET :**

[1111 - 1111](#)  
[Allison Flores - 106](#)  
[Bob Smith - 101](#)  
[Cyrus Small - 105](#)  
[HE - 5678](#)  
[Jenny Johnson-Smith - 104](#)  
[Jon Wilson - 103](#)  
[Matt Tyson - 108](#)  
[ME - 987654](#)  
[ME testing-g - 987654](#)  
[Mike Redding - 109](#)  
[number four testing preset - 8301](#)  
[number three testing preset - 9998888112](#)  
[number two testing preset](#)  
[PG&E - 8301](#)  
[Sally Smith - 102](#)  
[T6-JK - 123456](#)  
[Tara Tennison - 110](#)  
[D1 -](#)

[Close \[X\]](#)

**SEARCH FOR A CONTACT:** [close \[X\]](#)

Notes: when doing a search for a contact, wildcard or partial search terms are not allowed.  
 Contact search requests are all logged in the system.

Office Number:

First Name:

Last Name:

BU Name:

Department:

Group Name:

Job Title:

Location:

[SUBMIT SEARCH](#) [reset form](#)

**CONTACTS SEARCH RESULTS:** [close \[X\]](#)

Results Found: 4

#	FIRST NAME	LAST NAME	OFFICE	MOBILE	OTHER 1	OTHER 2	BU NAME
1	Bob	Smith	1234	917275551212	918135551212		
	Dept:	Group:	Job:	Location:			
2	Bob	Salamander	8877				
	Dept:	Group:	Job:	Location:			
3	Bob	Johnson	1234	917275551212	918135551212	8635551212	acme printing
	Dept: circulation	Group: IT	Job: executive assistant in charge	Location: chicago			
4	Bob	Collins	1234	917275551212	918135551212	8635551112	business unit
	Dept: department	Group: group	Job: job title	Location: location			

[Go Back](#)

Figure 22. Preset Transfer Numbers & Contacts Search Panels

## TRANSFER PRESETS or CONTACTS – List of Preset Phone Numbers

If your campaign is set up for it, you may have a button in the bottom right hand corner of the main screen labeled “PRESETS” or “CONTACTS”. Once clicked, PRESETS will display a list of phone numbers that can be dialed. Depending on how your campaign has been configured this list will have the phone number & a corresponding name as an indicator, or just the name. By clicking on the name in the list, it places the phone number in the Transfer-conference section's “Number to Call” field. For CONTACTS, you can be allowed to search through a custom list of internal contacts that you can transfer the call to.

## Agent Choose CALLER ID

If the manager has enabled this feature, there will be a “Click Here to Choose” link on the Transfer-conference frame. This allows you to select, on a per call basis, which of several caller ID options you will display when placing a call to a third party. Your choices are:

- Campaign:** displays the default caller ID for the campaign you are currently logged into
- Customer:** displays the phone number of the customer you currently have on the line
- Agent Phone:** displays the default caller ID for your agent extension
- Custom:** displays the unique caller ID assigned to this lead

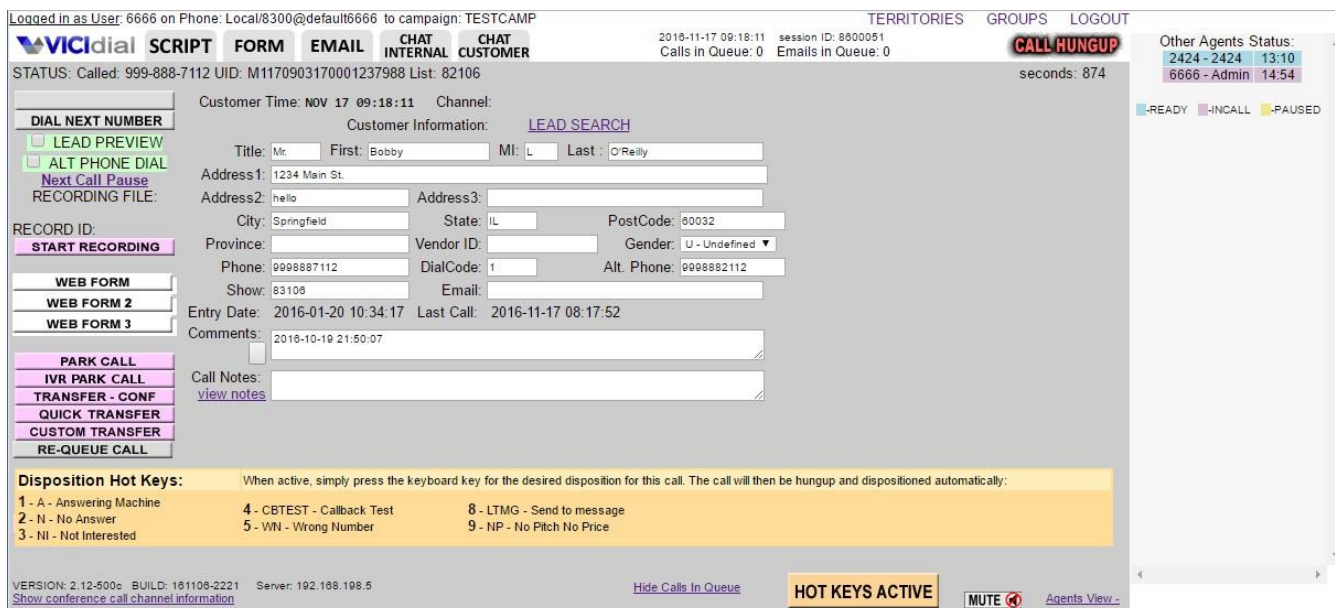


Figure 23. OCdialer HotKeys

## USING HOTKEYS

Hotkeys are a way of reducing the time it takes to hangup and disposition a call if the customer is unavailable. This feature is set up by your manager. Hotkeys work by assigning a Call Disposition to the number keys(1-9) on your keyboard. This feature is activated when your mouse pointer is on top of the orange Hotkeys button at the bottom of your screen. When the mouse is over the Hotkeys button you'll see the list of Call Dispositions available, and their corresponding number on your keypad. When you are ready to end the call, press the number for the disposition you've chosen for that call. The call will immediately be hung-up, dispositioned automatically, and you will be able to take your next call immediately. There are also special HotKeys that can allow you to dial one of the alternate phone numbers on a lead, as well as other special HotKeys that can automatically transfer the call you are on and optionally disposition the call as well. To use Hotkeys, it needs to be activated by your manager for your user login and for the campaign that you are using. (see Figure 23).

## VOLUME CONTROL

On some systems, you will have the ability to control the volume level of the customer as well as being able to mute yourself by clicking on buttons at the bottom of the agent screen. The customer volume control buttons are directly below the Send DTMF button. There is a button with a red UP arrow to raise the customer volume and a button below that with a blue DOWN arrow to lower the customer volume. On the right side of the screen there is a MUTE button that allows the agent to mute themselves. When clicked, this button will change to UNMUTE that will allow you to turn off muting when it is clicked. For the customer volume control, after the call is over the next call will be a normal volume level. There are also volume control buttons available for every connected caller in the "Show conference call channel information" panel at the bottom of the screen.

## COMMENTS

This field appears below the customer's information on the MAIN tab. The Comments field allows you to add additional remarks regarding the call or customer, beyond the general information provided on the MAIN tab. There is also an optional feature that will allow Comments to function like a Call Notes feature, clearing the comments before every call and storing the previous comments in a frame that you can access by clicking on the button directly below the “Comments” label. There are also options to allow the Comments field to move to the bottom of the agent screen when moving to the SCRIPT or FORM tabs.

CALL NOTES LOG: <a href="#">close [X]</a>										
#	DATE/TIME	AGENT	LENGTH	STATUS	PHONE	CAMPAIGN	IN/OUT	ALT	HANGUP	
1	2020-04-11 09:40:26	6666 - Admin user	0	NP	1 999777112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	
NOTES: First call call notes										
2	2020-04-11 09:41:03	6666 - Admin user	37	TD	1 999777112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	
NOTES: second call call notes										

Figure 24. Call Notes Log Display

## CALL NOTES

This is an optional feature that can be enabled by your manager on a per-campaign basis. This field appears below the “Comments” field on the Main tab, and the Disposition screen (allowing you to add remarks even after you have hung up the call). Unlike Comments, these per-call notes are permanently saved for each call on the lead and cannot be modified. Optionally (If you manager has enabled it) you can see the previous Call Notes from other calls and other agents that have spoken to this customer by clicking on the “view notes” link directly below the “Call Notes” title. The notes will each be stamped with the date & time of the previous call, along with the User ID of each agent. Also, Call Notes can be included as a part of a SCRIPT, as is shown in Figure 5.

**DISPOSITION CALL : 9998887112**   [Hangup Again](#)   [minimize](#)

**Call Notes:**

call notes get typed in here

**Comments:** 2016-10-19 21:50:07

**CALL DISPOSITION**

<p><a href="#">A - Answering Machine</a></p> <p><a href="#">B - Busy</a></p> <p><a href="#">CALLBK - Call Back *</a></p> <p><a href="#">CBK - Callback *</a></p> <p><a href="#">CBLEAD - Callback *</a></p> <p><a href="#">DC - Disconnected Number</a></p> <p><del>DEC - Declined sale</del></p> <p><a href="#">DELXX - test</a></p> <p><a href="#">DNC - DO NOT CALL</a></p> <p><a href="#">DROP - Agent Not Available DROP</a></p>	<p><a href="#">HSTR - H\$ter status</a></p> <p><a href="#">JDTEST - jons test</a></p> <p><a href="#">N - No Answer</a></p> <p><b><a href="#">NI - Not Interested</a></b></p> <p><a href="#">NP - No Pitch No Price</a></p> <p><a href="#">QCCOMM - QC_COMMIT</a></p> <p><a href="#">RECENA - Rcvd email - no answer given</a></p> <p><a href="#">SALE - Sale Made</a></p> <p><a href="#">TD - Turducken approved</a></p>	<p><a href="#">TESTAM - TEST Answering Machine</a></p> <p><a href="#">XFER - Call Transferred</a></p> <p><a href="#">AGNTA - Agent Answering Machine</a></p> <p><a href="#">AGNTAM - Agent Answering Machine2</a></p> <p><a href="#">CBTEST - Callback Test *</a></p> <p><a href="#">LTMG - Send to message</a></p> <p><a href="#">SSALE - Super Sale</a></p> <p><a href="#">TEST - Test status dnc</a></p> <p><del>WN - Wrong Number</del></p> <p><a href="#">XGH - Extra GH status</a></p>
---	--	--

**PAUSE AGENT DIALING**  
[CLEAR FORM](#) | [SUBMIT](#)  
[WEB FORM SUBMIT](#)

**Figure 25. OCDialler Call Disposition Screen**

## ***DISPOSITIONING A CALL***

After a customer call is hung-up, the green Disposition screen will appear (see Figure 25). Here you can select the appropriate status for the call you've just completed. To select a status, you can either double click the link, or click the link once and then select the SUBMIT link at the bottom. If you are in auto-dial mode and want to go into PAUSE before receiving your next call, select the PAUSE AGENT DIALING checkbox before selecting your status. This assures you will be in PAUSE after dispositioning the call, and you do not immediately get another call.

If you need to take written down notes, such as a log sheet, and you forget to write down the customer information before you select the hangup button, you can click on the 'minimize' button at the top of the Disposition screen to move the disposition frame out of the way. This allows you to see the customer data below. At this point, the data can not be edited, because it has already been committed to the system once you pressed the hangup button. There are also options to allow the Comments field and the Call Notes field to appear on the disposition screen for further editing after the call has been hung up. You will notice that there are some statuses in the example screenshot above that have a line through them and are not able to be selected. Managers have the ability to block statuses if the customer was on the line with the agent for a minimum or maximum time. For example, if you were on the phone with a customer for only 20 seconds, the manager may have set the SALE status to have a minimum of 60 seconds of talk time, so you cannot select that status when you go to disposition your 20 second phone call.

## Customer is still on the line

If a customer is still on the phone after you have arrived at the Disposition screen, you can click on the "Hangup Again" link at the top of the screen to attempt to hangup the call again (You can only click this link once per call). This should be an infrequent problem. If the call still does not hang up, you should be able to hang it up from the "conference call channel information" link list at the bottom of your agent screen after Dispositioning the call.

## Minimize to see customer details

If you need to see the information on the screen about the customer you just talked to, you can click on the "minimize" link at the top of the screen to view the customer information again. Any editing of this information will be discarded since the customer information is committed to the system as soon as you click on the "Hangup Customer" button.

## Open web form after dispositioning

If your manager instructs you to, you can click on the "Web Form Submit" link on the Disposition screen to open up a web form window at the time you submit your chosen call disposition. This web form window will also be sent the disposition that you just selected for the previous call.

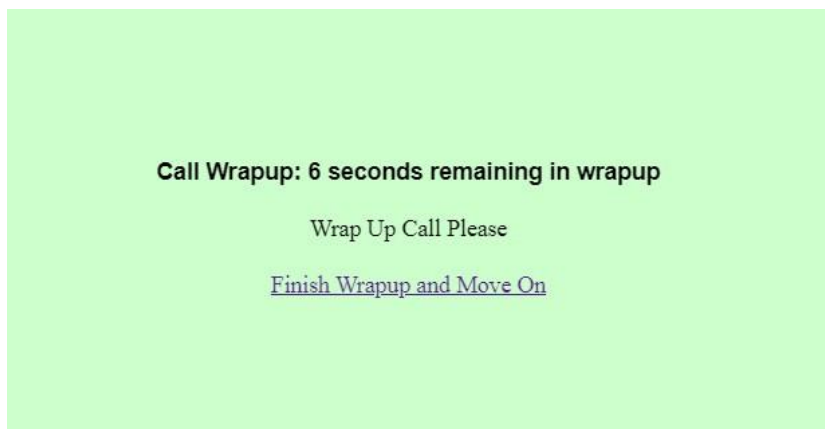


Figure 26. Post-call Wrapup Screen

## Wrapup Time After Call

If your campaign is set up for it, you might have a set amount of time after you hangup and disposition a call, during which you can complete other call wrapup work before you are able to receive another call. You will see a green Wrapup screen after dispositioning a call. It contains a countdown indicating how many seconds of wrapup time remain before the green wrapup screen disappears and you can take another call. There is also a "Finish Wrapup and Move On" link that you can click to bypass the wrapup time and immediately go on to the next call.



## PRE-CALL WORK

This manager enabled feature is available in Auto-dialing mode. This setting will automatically place you in PAUSE when you have selected any of the following functions that would require you to be paused; such as: *Manual Dial, Fast Dial, Lead Search, Call Log View, Callbacks Check, Enter Pause Code*.

The screenshot displays the OCdialler Live Call interface. At the top, it shows the user is logged in as 'User: 6666' on phone 'Local/8300@default6666' to campaign 'TESTCAMP'. The interface includes navigation tabs for SCRIPT, FORM, EMAIL, CHAT INTERNAL, and CHAT CUSTOMER. A 'LIVE CALL' indicator is present in the top right corner. The main area shows customer information for 'Bobby L. O'Reilly' at '1234 Main St., Springfield, IL 60032'. Call details include 'Entry Date: 2016-01-20 10:34:17' and 'Last Call: 2016-11-17 09:22:57'. A sidebar on the left contains various call control buttons like 'LEAD PREVIEW', 'ALT PHONE DIAL', 'STOP RECORDING', and 'PARK CALL'. At the bottom, a 'LIVE CALLS IN YOUR SESSION' table lists active channels with 'HANGUP' and 'VOLUME' controls.

#	REMOTE CHANNEL	HANGUP	VOLUME
1	Local/8600051@default-00004d96;2	<a href="#">HANGUP</a>	[MUTE] [UNMUTE]
2	Local/8600051@default-00004d95;2	<a href="#">HANGUP</a>	[MUTE] [UNMUTE]
3	Local/58600051@default-00004d97;2	recording	

Figure 27. OCdialler Live Call and calls-in-session display

## CALLS IN THE SESSION, AND FORCED HANGUPS

To see the participants in your session at any time, click on the "Show conference channel information" link at the bottom of your screen. A frame will appear at the bottom that will list the channels in your session including your channel. If you have a problem where a channel does not get hung up properly when you have clicked a hungup button, you can click on the channel's HANGUP link in this frame and it will be released.

Also in this frame will be volume control buttons allowing you to raise, lower and mute the volume on any call in your session.

Recording channels will appear on this list, but they cannot be hung up or have their volume modified.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER 2016-11-17 12:32:09 session ID: 8600051  
**Calls in Queue: 2** Emails in Queue: 0 **NO LIVE CALL**

STATUS: Called: 999-888-7112 UID: M1171230510001237988 List: 82106 seconds: 11

**YOU ARE PAUSED** Customer Time: Channel:

**DIAL NEXT NUMBER** Customer Information: [LEAD SEARCH](#)

LEAD PREVIEW  
 ALT PHONE DIAL  
[Next Call Pause](#)  
 RECORDING FILE:  
 RECORD ID:

Dialable Leads: 19788 [NO ACTIVE CALLBACKS](#) [ENTER A PAUSE CODE](#)  
[MANUAL DIAL](#) [FAST DIAL](#) [VIEW CALL LOG](#)

VERSION: 2.12-500c BUILD: 161108-2221 Server: 192.168.198.5 [Hide Calls In Queue](#) **HOT KEYS INACTIVE**  [Agents View +](#)

Calls In Queue:

	PHONE	FULL NAME	WAIT	AGENT	CALL GROUP	TYPE
<a href="#">TAKE CALL</a>	3125551212	Bob Smith	1:34	6666 - Admin	AGENTDIRECT - Single Agent Direct Queue	IN
<a href="#">TAKE CALL</a>	9998887112	Bobby O'Reilly	1:04	6666 - Admin	TEST_IN3 - TEST inbound 3	IN

Figure 28. OCDialler Live Call and calls in queue display

## CALLS IN QUEUE, AND TAKE CALL

To see the waiting calls, in the In-Group queues available to you, click on the "Show Calls In Queue" link at the bottom of your screen. A frame will appear (at the bottom of the screen) that will list calls from the In-groups currently assigned to or chosen by you. This listing will show you the phone number of the caller, the name, if there is one, the amount of time the caller has been waiting in queue, the agent the call came from or the number that the customer dialed to get to the queue, the color of the In-group, the name of the In-group and whether the call is inbound or outbound.

To take a call you need to be paused. Then click on the TAKE CALL link to have the call sent to you. There may be a delay of a few seconds, if the customer is listening to a place-in-line prompt or other non-transfer prompt.

In the picture below, you can see the optional extra lead-field columns are shown in the "Calls In Queue" panel (in this case, the ALT PHONE and ADDRESS3 fields are used).

Calls In Queue:

	PHONE	FULL NAME	ALT PHONE	ADDRESS3	WAIT	AGENT	CALL GROUP	TYPE
<a href="#">TAKE CALL</a>	3125551212	station 352	3125558887	ACME Electric Company	0:39	6666 - Admin user	TEST_IN2 - TEST inbound 2	IN
<a href="#">TAKE CALL</a>	9998887112	Test Call	3125552276	3125558872	0:11	6666 - Admin user	TEST_IN3 - TEST inbound 3	IN

Figure 29. OCDialler Calls In Queue display, with extra columns



Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP

2022-04-21 13:27:25 session ID: 8600051

GROUPS LOGOUT

**VICIdial** SCRIPT SCRIPT 2 FORM EMAIL CHAT INTERNAL CHAT CUSTOMER

Out Waiting: 0 In Waiting: 1 Emails in Queue: 0 **LIVE CALL**

STATUS: Incoming: (999)900-0796 UID: V4211327090000795993 List: 107 seconds: 2

Customer Time: APR 21 1:27:26 PM Channel: IAX2/127.0.0.1:40569-7925

Customer Information: [LEAD SEARCH](#)

ALT PHONE DIAL

[Next Call Pause](#)

RECORDING FILE:  
20220421-132723\_999900...  
RECORD ID: 305654

**RECORDING**

**MUTE RECORDING**

**WEB FORM**

Title: MR First: Test MI: E Last: Lead 796

Address1: 123 Main St

Address2: Address3:

City: New York State: NY PostCode: 10110

Province: Vendor ID: 1000796 Gender: M - Male

Phone: 9999000796 DialCode: 1 Alt Phone:

**Figure 30. OCdialler Multiple Queues Count display**

## ***Multiple Calls In Queue Counts Display***

In the figure above, you can see there is more than one call queue count, for this example one count represents the number of outbound auto-dialed calls waiting for an agent, and the second represents the number of inbound calls in queue waiting for an agent. This is just one of the possible configurations for how the calls in queue counts can be configured. If you want to know how the campaign you are logged into is configured, you should ask your manager.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER 2016-11-17 12:35:34 session ID: 8600051 **LIVE CALL** Other Agents Status: 2424 - 2424 1:33 6666 - Admin 0:49

STATUS: Incoming: 312-555-1212 Group: TEST inbound 3 Fronter: Admin - 6666 UID: Y1171234470001139739 List: 929 seconds: 49

Customer Time: NOV 17 11:35:34 Channel: IAX2/cc352-2879

DIAL NEXT NUMBER  
 LEAD PREVIEW  
 ALT PHONE DIAL  
[Next Call Pause](#)  
 RECORDING FILE:  
 RECORD ID:  
  
 WEB FORM  
  
  
  
  
  
  
  
  
  
 Dialable Leads: 19788 [NO ACTIVE CALLBACKS](#) [ENTER A PAUSE CODE](#)  
[MANUAL DIAL](#) [FAST DIAL](#) [VIEW CALL LOG](#)

Customer Information: [LEAD SEARCH](#)

Title: Mr. First: Bob MI: X Last: Smith  
 Address1: 1234 main st  
 Address2: addr2 Address3: Bob Inc.  
 City: Chicago State: IL PostCode: 60987  
 Province: VISA Vendor ID: vic1238 Gender: U - Undefined  
 Phone: 3125551212 DialCode: 1 Alt. Phone: 98712  
 Show: sec phrase Email: emailgg  
 Entry Date: 2015-11-04 10:01:02 Last Call: 2008-01-01 00:00:00  
 Comments: start! entering...! confirming...! cx accepted! updating record...! finished  
 Call Notes: [view notes](#)

VERSION: 2.12-500c BUILD: 161108-2221 Server: 192.168.198.5 [Hide Calls In Queue](#) **HOT KEYS INACTIVE**  [Agents View -](#)

Figure 31. OCdialler Agents View display

## AGENTS VIEW SIDEBAR

To see the agents that are logged in on your system (or just the agents logged into your campaign or user group) you can click on the “Agents View +” link on the bottom right side of your screen. This will bring up the agents view sidebar, showing the agents with a color (blue for READY, purple for INCALL and yellow for PAUSED) and optionally the amount of time the agent has been in that state.

Select a Callback Date :

2022-05-29 Hour: 00 Minutes: 00  MY CALLBACK

CB Comments:

Comments:

**SUBMIT**

April 2022							May 2022							Sun
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2	1	2	3	4	5	6	7	5
3	4	5	6	7	8	9	8	9	10	11	12	13	14	12
10	11	12	13	14	15	16	15	16	17	18	19	20	21	19
17	18	19	20	21	22	23	22	23	24	25	26	27	28	26
24	25	26	27	28	29	30	29	30	31					

Memorial Day 2022

August 2022							September 2022							Sun
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6					1	2	3	
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16
28	29	30	31				25	26	27	28	29	30		23

December 2022							January 2023							Sun
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
				1	2	3	1	2	3	4	5	6	7	5
4	5	6	7	8	9	10	8	9	10	11	12	13	14	12
11	12	13	14	15	16	17	15	16	17	18	19	20	21	19
18	19	20	21	22	23	24	22	23	24	25	26	27	28	26
25	26	27	28	29	30	31	29	30	31					

Select a Customer Timezone:		close
SERVER TIME:	2022-04-21 13:48:36	
LEAD TIME:	2022-04-21 13:48:36 (0 hours difference)	
Atlantic US Time Zone:	2022-04-21 13:48:36 (0 hours difference)	
Eastern US Time Zone:	2022-04-21 13:48:36 (0 hours difference)	
Central US Time Zone:	2022-04-21 12:48:36 (1 hours difference)	
Mountain US Time Zone:	2022-04-21 11:48:36 (2 hours difference)	
Arizona US Time Zone:	2022-04-21 10:48:36 (3 hours difference)	
Pacific US Time Zone:	2022-04-21 10:48:36 (3 hours difference)	
Alaska US Time Zone:	2022-04-21 09:48:36 (4 hours difference)	
Hawaii US Time Zone:	2022-04-21 07:48:36 (6 hours difference)	
Canada Newfoundland Time Zone:	2022-04-21 15:18:36 (-1.5 hours difference)	
Canada Atlantic Time Zone:	2022-04-21 14:48:36 (-1 hours difference)	
Canada Saskatchewan Time Zone:	2022-04-21 11:48:37 (2 hours difference)	
Yukon Time Zone:	2022-04-21 10:48:37 (3 hours difference)	
Eastern Australia Time Zone:	2022-04-22 03:48:37 (-14 hours difference)	
Queensland Australia Time Zone:	2022-04-22 03:48:37 (-14 hours difference)	
Central Australia Time Zone:	2022-04-22 03:18:37 (-13.5 hours difference)	
Northern Territory Australia Time Zone:	2022-04-22 03:18:37 (-13.5 hours difference)	
Western Australia Time Zone:	2022-04-22 01:48:37 (-12 hours difference)	

Figure 32. OCDialler Callback Date-and-Time and Comment Screen

## CALLBACKS

The Callback feature allows you to set a date and time for leads so that they can be removed from active dialing, until that date and time have arrived. Callbacks default to allow any agent to receive the call when the customer is called back (ANYONE Callbacks). Additionally, if it is enabled for your account, an agent can select to have the callback be restricted to only their login (AGENT ONLY Callbacks). When an agent receives a call that was last set as a CALLBK, there will be a message showing up next to the "Customer Information" header of the OCDialler screen that will say "PREVIOUS CALLBACK" so that the agent will know that this lead was set as a callback the last time it was called. Agent Only Callbacks can trigger a flashing alert on the screen when they hit their callback date and time.

## Setting a Callback

When setting a Callback for a specific date and time, the agent will hangup the call as usual and select one of the scheduled callback statuses, such as CALLBK, in the disposition screen. You can tell which statuses are callbacks because they have an asterisk "\*" to the right of the status (see Figure 25). Once chosen, a new calendar screen displaying the next 12 months will pop up (see Figure 31). The agent needs to choose a day from the calendar and then select a time (hour, half hour and AM/PM menus at the top of the screen) for that lead to be contacted back. There is also a field for comments about the callback, if necessary. Once a callback date and time are set, click on the SUBMIT button to go on to the next call. The manager can also limit how far in advance a callback may be set. If you are unable to set a callback for the desired date, contact your manager to see if that feature has been enabled.

Callbacks are reactivated and put back into the system at the date and time specified by the agent. The call will not happen immediately and by default the agent that set it may not necessarily get that callback call. It is important to note that managers have the ability to see what callbacks were set by each agent and when the agent set them. Managers also have the ability to override agent callbacks by changing them to Anyone callbacks or assigning them to another agent.

If your system is configured for it, you will also see a “Customer Timezone” link at the top of the Callback screen. If you click on it, you will see a panel open that will show you a list of the customer timezones configured on your system. You can select one of these timezones to select where your customer is located, so that their callback happens at the proper time in their location.

You may also see selected “Holidays” appear on the Scheduled Callback screen if they are configured in your system. These dates will show in the color orange and they will display the name of the holiday when you hover your cursor over them, as shown in the figure above for “Memorial Day 2022”.

## **Receiving a Callback**

If you receive a call that had been last dispositioned as a scheduled callback, either ANYONE or AGENTONLY, you will see a box appear with information about the callback record including the date of the last call, the scheduled callback date and time along with any callback comments that were entered by the agent that set the callback.

**CALLBACKS FOR AGENT 6666:**

To see information on one of the callbacks below, click on the INFO link. To call the customer back now, click on the DIAL link. If you click on a record below to dial it, it will be removed from the list.

#	CALLBACK DATE/TIME	NUMBER	INFO	FULL NAME	STATUS	CAMPAIGN	LAST CALL DATE/TIME	DIAL	ALT
1	2018-08-27 20:00:00	9999057780	- <a href="#">INFO</a>	Test Lead 57780	LIVE	TESTCAMP	2018-08-27 12:29:01	<a href="#">DIAL</a>	<a href="#">ALT</a>
		Customer Time: 2018-08-28 12:00:00		Customer Timezone: LEAD TIME					
2	2018-08-28 18:00:00	9999053827	- <a href="#">INFO</a>	Test Lead 53827	LIVE	TESTCAMP	2018-08-27 14:38:56	<a href="#">DIAL</a>	<a href="#">ALT</a>
		Customer Time: 2018-08-28 12:00:00		Customer Timezone: Hawaii US Time Zone					
3	2019-01-08 00:00:00	9999003975	- <a href="#">INFO</a>	Test Lead 3975	LIVE	TESTCAMP	2019-01-08 17:47:01	<a href="#">DIAL</a>	<a href="#">ALT</a>
4	2019-01-09 00:00:00	9999059089	- <a href="#">INFO</a>	Test Lead 59089	LIVE	TESTCAMP	2019-01-09 01:37:59	<a href="#">DIAL</a>	<a href="#">ALT</a>
5	2019-01-17 10:00:00	9999013935	mine - <a href="#">INFO</a>	Test Lead 13935	LIVE	TESTCAMP	2019-01-17 09:39:17	<a href="#">DIAL</a>	<a href="#">ALT</a>
6	2019-01-22 00:00:00	9998884112	test cb co... - <a href="#">INFO</a>	test Lead	LIVE	TESTCAMP	2019-01-22 12:58:34	<a href="#">DIAL</a>	<a href="#">ALT</a>
7	2019-03-17 19:00:00	9998885112	mine - <a href="#">INFO</a>		LIVE	TESTCAMP	2019-03-11 22:08:16	<a href="#">DIAL</a>	<a href="#">ALT</a>
8	2019-03-25 00:00:00	9999004386	- <a href="#">INFO</a>	Test Lead 4386	LIVE	TESTCAMP	2019-03-25 12:30:20	<a href="#">DIAL</a>	<a href="#">ALT</a>
9	2019-04-06 00:00:00	9999031155	mine - <a href="#">INFO</a>	Test Lead 31155	LIVE	TESTCAMP	2019-04-06 16:23:05	<a href="#">DIAL</a>	<a href="#">ALT</a>
10	2019-04-06 12:00:00	9999054282	mine 2 - <a href="#">INFO</a>	Test Lead 54282	LIVE	TESTCAMP	2019-04-06 16:24:00	<a href="#">DIAL</a>	<a href="#">ALT</a>
11	2019-04-06 12:00:00	9999021162	mine 3 - <a href="#">INFO</a>	Test Lead 21162	LIVE	TESTCAMP	2019-04-06 16:26:13	<a href="#">DIAL</a>	<a href="#">ALT</a>
12	2019-05-10 00:00:00	9999056519	- <a href="#">INFO</a>	Test Lead 56519	LIVE	TESTCAMP	2019-05-10 18:02:49	<a href="#">DIAL</a>	<a href="#">ALT</a>
13	2019-05-15 15:50:06	9999024794	mine 4 - <a href="#">INFO</a>	LARRY TEST LEAD	LIVE	TESTCAMP	2019-04-06 16:27:08	<a href="#">DIAL</a>	<a href="#">ALT</a>
14	2019-05-15 15:50:06	9999028989	mine 5 - <a href="#">INFO</a>	CURLY LEAD	LIVE	TESTCAMP	2019-04-06 16:27:36	<a href="#">DIAL</a>	<a href="#">ALT</a>
15	2019-05-15 15:50:06	9999056519	- <a href="#">INFO</a>	Test Lead 56519	LIVE	TESTCAMP	2019-05-10 18:00:06	<a href="#">DIAL</a>	<a href="#">ALT</a>
16	2019-09-12 22:30:00	9998887112	- <a href="#">INFO</a>	Billy'Oj O'Reillyo	LIVE	TESTCAMP	2019-09-13 10:32:49	<a href="#">DIAL</a>	<a href="#">ALT</a>
		Customer Time: 2019-09-13 12:00:00		Customer Timezone: Northern Territory Australia Time Zone					
17	2019-10-13 08:15:00	9998887112	mine 2 - <a href="#">INFO</a>	Billy'Oj O'Reillyo	LIVE	TESTCAMP	2019-10-13 09:03:07	<a href="#">DIAL</a>	<a href="#">ALT</a>
18	2019-10-13 09:00:00	9998883112	mine 333 - <a href="#">INFO</a>	Bob	LIVE	TESTCAMP	2019-10-13 09:42:40	<a href="#">DIAL</a>	<a href="#">ALT</a>
		Customer Time: 2019-10-13 08:00:00		Customer Timezone: Central US Time Zone					
19	2019-11-04 00:00:00	9998887112	mine! - <a href="#">INFO</a>	Billy'Oj O'Reillyo	LIVE	TESTCAMP	2019-11-04 18:06:44	<a href="#">DIAL</a>	<a href="#">ALT</a>

[Refresh](#)      [Go Back](#)

Figure 33. OCDialler Agent-Only Callbacks

## Agent-only Callbacks

If your manager has activated this feature, it will display a "MY CALLBACK ONLY" checkbox under the date fields in the callback screen (If you have dispositioned calls as scheduled callback). This checkbox, if selected by the agent, will save the callback to only be accessible by the agent that set it.

If you have set an agent-only callback, you will see a text link under the comments on your main screen that will show "1 ACTIVE CALLBACKS". If you click on this link you will see a screen that has a list of all ACTIVE and LIVE callbacks for the campaigns that you are currently logged into (see Figure 32). An ACTIVE callback is one that has yet to be triggered, while a LIVE callback is one that has passed its callback trigger date and time. For agent-only callbacks you can call both ACTIVE and LIVE call-backs. If you click on one of the callbacks listed in this screen the callback record will be changed to INACTIVE, removed from the list, and you will go to the main screen in manual dial mode where you can see the customer details. From here you can call the customer by clicking on the "DIAL LEAD" link at the top of the screen. After the call is over you can HANGUP CUSTOMER as usual and disposition it. If you want to set it to callback again, another callback record will be added and you will need to pick a new date and time.

Depending on your system settings, these callbacks that belong to you may trigger and dial automatically at the scheduled time.

## Callback Alert Types

Your manager can also enable Callback Alerts, which differ from the standard status line. The alerts range from red, blinking, or blinking red. In addition, each of those alerts also has a DEFER option which will stop blinking and/or displaying in red when you check the callbacks, until the number of



callbacks changes. Select the “Go back” link to go back to the Main tab.

**AGENT CALL LOG:** [close \[X\]](#)

[<< 2016-11-10](#)
[< 2016-11-16](#)
2016-11-17
[GO](#)
[close](#)

#	DATE/TIME	LENGTH	STATUS	PHONE	FULL NAME	CAMPAIGN	IN/OUT	ALT	HANGUP	INFO	DIAL
1	2016-11-17 03:39:51	75	TD	1 3125551212	Bob Smith	TEST_IN3	IN	MAIN	CALLER	<a href="#">INFO</a>	<a href="#">DIAL</a>
2	2016-11-17 06:27:50	8	TD	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
3	2016-11-17 06:28:14	0	NP	1 998887112		TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
4	2016-11-17 06:29:20	66	NP	1 998887112		TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
5	2016-11-17 06:30:31	71	NP	1 998887112		TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
6	2016-11-17 06:31:18	17	TD	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
7	2016-11-17 06:32:17	21	NP	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	CALLER	<a href="#">INFO</a>	<a href="#">DIAL</a>
8	2016-11-17 06:34:33	11	NI	1 9999010707	Test Lead 10707	TESTCAMP	OUT-AUTO	MAIN	CALLER	<a href="#">INFO</a>	<a href="#">DIAL</a>
9	2016-11-17 06:34:34	27	NI	1 3125551212	Bob Smith	TEST_IN3	IN	MAIN	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
10	2016-11-17 08:11:41	88	TD	1 9999008860	Test Lead 8860	TESTCAMP	OUT-MANUAL	MAIN	CALLER	<a href="#">INFO</a>	<a href="#">DIAL</a>
11	2016-11-17 08:16:30	35	TD	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
12	2016-11-17 08:17:54	112	TD	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
13	2016-11-17 08:20:02	100	TD	1 9998882112	Test	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
14	2016-11-17 08:25:09	0	TD	1 8585551213	John Public04	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
15	2016-11-17 08:59:10	105	TD	1 9998882112	Test	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
16	2016-11-17 09:03:17	1145	DCMX	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	CALLER	<a href="#">INFO</a>	<a href="#">DIAL</a>
17	2016-11-17 09:22:58	14	NI	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
18	2016-11-17 09:27:44	125	NI	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
19	2016-11-17 12:27:49	23	TD	1 3125551212	Bob Smith	TEST_IN3	IN	MAIN	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
20	2016-11-17 12:28:34	92	RQXFER	1 3125551212	Bob Smith	TEST_IN3	IN	MAIN	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
21	2016-11-17 12:30:07	23	TD	1 3125551212	Bob Smith	AGENTDIRECT	IN	MAIN	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
22	2016-11-17 12:30:53	11	NP	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
23	2016-11-17 12:34:47	127	CBTEST	1 3125551212	Bob Smith	TEST_IN3	IN	MAIN	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>
24	2016-11-17 12:47:03	4	CALLBK	1 9998887112	Bobby O'Reilly	TESTCAMP	OUT-MANUAL	MANUAL	AGENT	<a href="#">INFO</a>	<a href="#">DIAL</a>

[Close Call Log](#)

Figure 34. OCDialler Agent Call Log

## AGENT CALL LOG

If this feature has been configured by your manager, you will see the “View Call Log” link at the bottom right of the Main tab. Once selected, it allows you to see a list of the calls you have handled. It displays the *Date/Time*, *Length*, *Status*, *Phone Number*, *Customer Name*, *Campaign*, *inbound/outbound*, *Alternate Phone Number*, and *Hangup* data. You can click the “INFO” link to view the lead itself, or “DIAL” to manually dial the customer. The default setting displays only the current day's calls, but changing the Date field, at the top of the page, or clicking on the date links, allows you to view previous days calls.

## AGENT BLIND MONITORING ALERT

This optional feature allows your manager to send a popup alert to an agent that is being monitored to let them know someone is listening to their session. This can be used to advise important information that needs to be seen immediately.

**SEARCH FOR A LEAD:**      [close \[X\]](#)

Notes: when doing a search for a lead, the phone number, lead ID or Vendor ID are the best fields to use. Using the other fields may be slower. Lead searching does not allow for wildcard or partial search terms. Lead search requests are all logged in the system.

Phone Number:

Phone Number Fields:  Main Phone Number    Alternate Phone Number    Address3 Phone Number

Lead ID:

Vendor ID:

First:

Last :

City:

State:

PostCode:

[SUBMIT SEARCH](#)      [reset form](#)

**Figure 35. OCDialler Agent Lead Search**

**SEARCH RESULTS:**      [close \[X\]](#)

Results Found: 1

#	First Last	Phone	STATUS	LAST CALL	City	State	PostCode	Vendor ID	INFO	DIAL
1	2 4	1 9998885112	INCALL	2020-04-11 12:26:12	8	9	0	2	<a href="#">INFO</a>	<a href="#">SELECT</a>

[Go Back](#)

**Figure 36. OCDialler Agent Lead Search Results**

**AGENT LEAD SEARCH**

If your manager has enabled this feature on the campaign, you can search for a specific customer lead while in Pause, or after receiving an inbound call. You can search by using either the Main, Alternate or Address3 phone number, and any combination of the following data : *Lead ID, Vendor ID, First Name, Last Name, City, State, and Postal Code*. We recommend Main phone number, Lead ID, or Vendor ID, as they yield the fastest results. These fields do not allow for wildcard or partial search terms. Once you click Submit, the system will display a results page showing the lead or leads that meet the given criteria. From that page you can click the “INFO” link to view the lead itself, or “DIAL” to manual dial the customer. If you are on an inbound call, you will see a “SELECT” link here instead of the DIAL link. This SELECT link will change the Lead ID of the call you are currently on to the Lead ID that you are selecting here.

**Customer Information:** [close \[X\]](#)

Status:	CBHOLD
Vendor ID:	
List ID:	82106
Timezone:	-5.00
Called Since Last Reset:	Y1
DialCode:	1
Phone:	9998887112 - <a href="#">DIAL</a>
Title:	Mr.
First:	Bobby
Mi:	L
Last:	O'Reilly
Address1:	1234 Main St.
Address2:	hello
Address3:	
City:	Springfield
State:	IL
Province:	
PostCode:	60032
Country:	
Gender:	U
Alt. Phone:	9998882112 - <a href="#">DIAL</a>
Email:	
Show:	83106
Comments:	2016-10-19 21:50:07
Called Count:	68
Last Local Call Time:	2016-11-17 12:47:03

**CALL LOG FOR THIS LEAD:**

#	DATE/TIME	AGENT	LENGTH	STATUS	PHONE	CAMPAIGN	IN/OUT	ALT	HANGUP
1	2016-01-20 11:05:05	4545 - 4545 with a really long name	23	RQXFER	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
2	2016-01-20 11:05:29	4545 - 4545 with a really long name	60	RQXFER	1 9998887112	AGENTDIRECT	IN	MAIN	AGENT
3	2016-01-20 11:06:29	4545 - 4545 with a really long name	26	XGH	1 9998887112	AGENTDIRECT	IN	MAIN	AGENT
NOTES: notes go here									
4	2016-01-20 22:11:25	6666 - Admin	88	NI	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
NOTES: notes here									
5	2016-01-27 06:19:58	6666 - Admin	597	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	CALLER
6	2016-01-27 06:45:29	6666 - Admin	57	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
7	2016-01-31 20:43:04	6666 - Admin	46	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
8	2016-01-31 21:15:09	6666 - Admin	11	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT
9	2016-02-01 10:11:37	6666 - Admin	8	NP	1 9998887112	TESTCAMP	OUT-MANUAL	MANUAL	AGENT

**Figure 37. OCDialler Lead Info Screen**

## LEAD INFO SCREEN

In Figure 36 above, you will see the lead information screen. There are several ways to get to this screen, such as from the Scheduled Callbacks list, the Lead Search results, the Call Log or the View Notes link. This screen contains lead information as well as call log information and any call notes there may be. You can close this screen and go back to the previous screen by clicking on the “close” link at the top.



**NEW MANUAL DIAL LEAD FOR 6666 in campaign TESTCAMP:**

Enter information below for the new lead you wish to call.  
 Note: a dial prefix of 9 will be added to the beginning of this number  
 Note: all new manual dial leads will go into list 998

Dial Code:  (This is usually a 1 in the USA-Canada)

Phone Number:  (digits only)

Dial Lead ID:  (digits only)

Search Existing Leads:  (This option if checked will attempt to find the phone number in the system before inserting it as a new lead)

Group Alias: [Click Here to Choose a Group Alias](#)

Dial In-Group: [Click Here to Choose a Dial In-Group](#)

No-Call Dial: **DISABLED** [Click Here to Activate](#)

If you want to dial a number and have it NOT be added as a new lead, enter in the exact dialstring that you want to call in the Dial Override field below. To hangup this call you will have to open the CALLS IN THIS SESSION link at the bottom of the screen and hang it up by clicking on its channel link there.

Dial Override:  (digits only please)

[Dial Now](#)      [Preview Call](#)      [Go Back](#)

**Figure 38. OCDialler New Lead and Manual Lead Dialing**

## ***NEW LEAD, SEARCH LEAD MANUAL DIALING, AND FAST DIAL***

If your manager has activated this feature, you will see a MANUAL DIAL text link and a FAST DIAL text link below the comments field of your main OCDialler screen. These features allow you to add a new lead to the database manually or search for an existing lead by phone number and call that number.

### **Manual Dial**

If you click on the MANUAL DIAL link, you will go to a green screen allowing you to specify the customer number you want to call. When the "NEW MANUAL DIAL LEAD" screen appears you will see instructions at the top along with the campaign's dial prefix that your system may use to get to an outside line, a Dial Code field and a Phone Number field. Optionally, you may also see a "Dial Lead ID" field here as well, which can allow you to dial a specific lead without entering the phone number, if you know the Lead ID. In the USA and Canada the Dial code usually stays as a "1", the phone number field is a maximum length of 10 digits (this should only have digits entered into it).

Once you have entered in a phone number you can click on the "Search Existing" checkbox to see if this phone number is already in the system and bring up its record. "Preview Call" is an optional feature (enable by your manager) allows you to see the Comments or Call Notes from previous calls. You can click the "Dial Now" link and go to the main screen, ready to dial the lead. Once on the main screen you may choose to enter or modify the lead data in the "Customer Information" fields, before clicking the "DIAL LEAD" button to place the call.

From the Manual Dial screen, you can also place a call to any extension by entering it in the "Dial Override" field. After the call is finished and you have clicked on the "Hangup Customer" button, you will disposition the call as usual and go into the next call.

The Manual Dial screen also gives you the option to place the call using one of several pre-defined caller IDs, or “Group Aliases”. You can select these through the “Click here to choose a group alias” link.

Another option you have on this screen is to place the outbound call as if it were an inbound call through an In-Group, this feature is referred to a “Dial In-Group” on the manual dial screen. Another similar feature on this screen is “No-Call Dial”, which allows an agent to place a OCDialler-only phone call that does not go out through a phone line, in order to perform a non-call task, like putting together a postal mail piece to go out to a client, allowing for the time to still be logged in the system.

The optional “Dial Override” entry field on this screen place a call into your agent session, but it will not associate that call with a lead in the system.

## **Fast Dial**

The FAST DIAL link is very similar to the Manual Dial link, except to use it all you have to do is enter a phone number in to the main Customer Information “phone number” field and click on the FAST DIAL text link to start dialing that number. There are not as many options with this feature, but it is much faster to use with less steps.



Figure 39. OCDialler Group Alias Selection

## Group Alias Select

The optional Group Alias Select link allows you to select the callerID number that is sent out with manual dial and transfer conferences 3-way calls (see figure 38).



**Figure 40. OC Dialler Session Warning Messages**

## ***SESSION WARNING MESSAGES***

If your agent phone is hungup while you are logged into OC Dialler, you will be sent to a blue screen with a message stating that “No one is in your session” (see Figure 39). If you accidentally hungup your phone, you can return to your session by dialing the session ID that is at the top of your screen or you can have the dialer call you back by clicking the "Call Agent Again" link on the screen.

If your customer hungup, and you have not clicked on the HANGUP CUSTOMER button, you may see the "Customer is no longer in your session" message appear on your screen (see Figure 39). To remove this message, hangup the call as normal through your OC Dialler screen. You can also click on the "Finish and Disposition Call" link which will take you directly to the Disposition screen.

If your manager has logged you out, you may see a white screen with the message “Your session has been disabled” along with a RESET link. If this happens, make sure you click on the RESET link so that your OC Dialler timesheet and activity will be accurate.

One other message that you may see pop up is a warning that your session has been paused. This can happen sometimes when you having internet connection issues. If this persists, inform your manager.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP

TERRITORIES GROUPS LOGOUT

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER

2016-11-17 13:37:50 session ID: 8600051  
Calls in Queue: 0 Emails in Queue: 0

NO LIVE CALL

STATUS: Calling: 999-903-9105 UID: List: 107 Preview the Lead then [DIAL LEAD](#) or [SKIP LEAD](#) [ALT PHONE](#) or [ADDRESS3](#) seconds:

Customer Time: Channel:

**DIAL NEXT NUMBER**

LEAD PREVIEW  
 ALT PHONE DIAL  
[Next Call Pause](#)

RECORDING FILE:

RECORD ID:  
**START RECORDING**

WEB FORM  
WEB FORM 2  
WEB FORM 3

PARK CALL  
IVR PARK CALL  
TRANSFER - CONF  
QUICK TRANSFER  
CUSTOM TRANSFER  
RE-QUEUE CALL

HANGUP CUSTOMER

ND DTMF

Dialable Leads: 19787

[ENTER A PAUSE CODE](#)  
[MANUAL DIAL](#) [FAST DIAL](#) [VIEW CALL LOG](#)

Customer Information: [LEAD SEARCH](#)

Title: MR First: Test MI: E Last: Lead 39105  
Address1: 123 Main St  
Address2: Address3:  
City: New York State: NY PostCode: 10110  
Province: Vendor ID: 1039105 Gender: M - Male  
Phone: 9999039105 DialCode: 1 Alt. Phone:  
Show: none Email: test@test.com  
Entry Date: 2013-04-12 19:21:21 Last Call: 2008-01-01 00:00:00  
Comments: comments  
Call Notes: [view notes](#)

VERSION: 2.12-500c BUILD: 161109-2221 Server: 192.168.198.5  
[Show conference call channel information](#) [Hide Calls In Queue](#) **HOT KEYS INACTIVE** [Agents View +](#)

**Figure 41. OCDialler Lead Preview Manual Dialing**

## MANUAL DIALING MODE

Manual dialing mode is when the agent controls when a call to a customer is dialed by clicking on the green "Dial Next Number" button in the top left of the screen. In this mode, you will hear the ringing of the phone, you hang it up at any time manually, the system will not start another call until you click the button to dial again.

## PREVIEW DIALING

Clicking on the LEAD PREVIEW checkbox directly below the green DIAL NEXT NUMBER button activates this feature. This allows for the agent to be able to see the lead information before the call is placed (see Figure 40). This is desired for example if the agent just wants to open a WEB FORM with more information about the customer before dialing them. This feature is available in Manual dialing mode only. When you are ready to call the customer, simply click the "DIAL LEAD" link at the top of the screen. An optional feature places a "SKIP LEAD" link just to the right of DIAL LEAD. This allows you to skip over the current lead already on your screen, and preview the next lead available in the system. Keep in mind OCDialler logs and allows managers to view every lead skipped in your Agent Stats.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER 2016-11-17 13:40:08 session ID: 8600051  
Calls in Queue: 0 Emails in Queue: 0 NO LIVE CALL

STATUS: Dial Alt Phone Number: [MAIN PHONE](#) or [ALT PHONE](#) or [ADDRESS3](#) or [FINISH LEAD](#) List: 107 seconds: 10

Customer Time: Channel: [LEAD SEARCH](#)

Customer Information: [LEAD SEARCH](#)

Title: MR First: Test MI: E Last: Lead 39105

Address1: 123 Main St

Address2: Address3:

City: New York State: NY PostCode: 10110

Province: Vendor ID: 1039105 Gender: M - Male

Phone: 9999039105 DialCode: 1 Alt. Phone: 9998883112

Show: none Email: test@test.com

Entry Date: 2013-04-12 19:21:21 Last Call: 2008-01-01 00:00:00

Comments: comments

Call Notes: [view notes](#)

RECORD ID: [START RECORDING](#)

WEB FORM WEB FORM 2 WEB FORM 3

PARK CALL IVR PARK CALL TRANSFER - CONF QUICK TRANSFER CUSTOM TRANSFER RE-QUEUE CALL

HANGUP CUSTOMER

SEND DTMF

Dialable Leads: 2 ACTIVE CALLBACKS ENTER A PAUSE CODE  
19786 [MANUAL DIAL](#) [FAST DIAL](#) [VIEW CALL LOG](#)

VERSION: 2.12-500c BUILD: 161106-2221 Server: 192.168.198.5 Hide Calls In Queue HOT KEYS INACTIVE MUTE Agents View +

Figure 42. OCDialler Multiple Number per Lead Dialing

## MULTIPLE NUMBER-PER-LEAD DIALING

Clicking on the ALT PHONE DIAL checkbox directly below the LEAD PREVIEW checkbox activates this feature. This allows for you to dial the alternate phone numbers on the customer lead, if they can not be reached at their main number. These additional numbers can be located in the “alternate phone number” and/or “address3” fields. Nothing will change on the OCDialler screen until the call has been hungup. At this point the screen would normally go to the lead disposition screen, but in Alternate number dialing mode, the status area (at the top of the customer information screen) will change, displaying links that will allow you to dial the main customer number again, the alternate phone number, or the address3 field phone number (see Figure 41). When you have finished all of the calls you wanted to place for this lead, simply click on the FINISH LEAD link to go to the disposition screen.





**Figure 43. OC Dialler Territory Dialing Login Screen**

## ***TERRITORY DIALING***

This Manual Dial only feature allows you to dial a sub-set of leads in the campaign that are designed specifically for you or your user group. The Territories are created by your manager, and the customer leads are assigned a Territory. When you login, a green screen will display the Territory (or Territories) available to you. You can even select to be in more than one Territory at a time. After choosing your Territory and completing your login, you will be presented with leads from the Territories you selected.

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP GROUPS LOGOUT

**VICIdial** **SCRIPT** **SCRIPT 2** **FORM** **EMAIL** **CHAT INTERNAL** **CHAT CUSTOMER** 2020-04-11 11:33:36 session ID: 8600051  
 Calls in Queue: 0 Emails in Queue: 0 **NO LIVE CALL**

**Phone and Post Code Time Zone Mismatch!** seconds: 6

STATUS: Calling: (727)555-1212 UID: List: 82106 Preview the Lead then [DIAL LEAD](#) or [SKIP LEAD](#) [ALT PHONE](#) or [ADDRESS3](#) [commit](#)

**DIAL NEXT NUMBER** Customer Time: Channel:

LEAD PREVIEW Customer Information: [LEAD SEARCH](#)

ALT PHONE DIAL Title: First: Bob MI: Last: Wilson

[Next Call Pause](#) Address1: 1234 Main St.

RECORDING FILE: Address2: Address3:

Figure 44. Call Time Mismatch Alert

## CALL TIME MISMATCH ALERT

An optional Manual Dial only feature, that pops up an alert to advise when the timezone of the phone number does not match the timezone for the postal code on the customer lead. This manager enabled feature is a security measure to ensure the customer is called at the desired time for their current location. This feature only works when previewing manual dial leads, or in the Lead Information screen.

**DIAL ALERT:**

**Call Rejected: CHANUNAVAIL**

**Cause: 1 - Unallocated (unassigned) number.**

**SIP: 484 - Bad NPANXX**

[Close Message](#)

Figure 45. Dial Alert warning

## AGENT DIAL ALERT

This Manual Dial Alert advises that the placing of your current call did not complete correctly. This alert is usually rare and indicates a potential problem with the phone number you were trying to dial or with your phone line carrier. Please alert you manager, make note of the phone number you were trying to dial, and document the information that it displays for you.



Figure 46. Dial Alert: Auto Hangup and False Answer

## **AGENT DIAL AUTO HANGUP**

If your system is configured for it, when manual dialing you may see a message that indicates that your phone call was automatically hung up, with a reason for this action. This is typically done to combat False Answer Signals on phone calls, or Post Dial Delay of phone calls, and is done to save your time by automatically hanging up the call and allowing you to move on to your next call without having to determine for yourself that the call did not connect to a person.

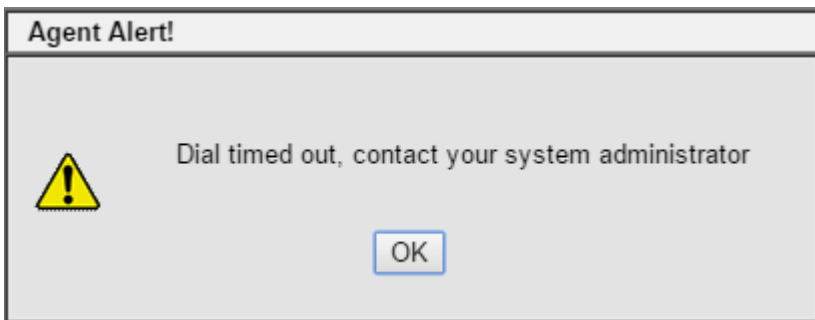


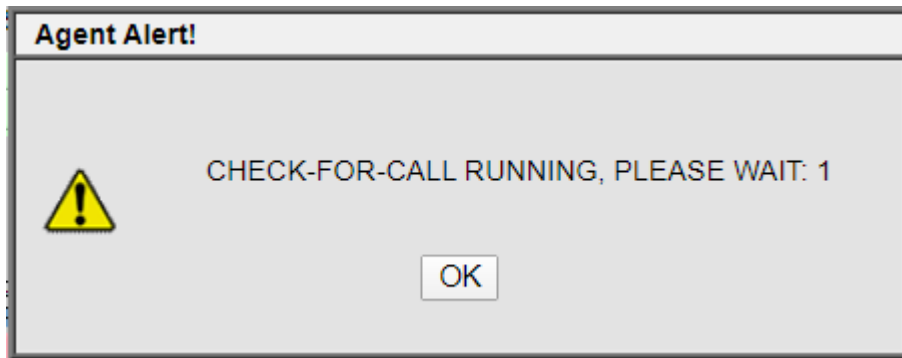
Figure 47. Manual Dial Timeout Alert

## **MANUAL DIAL ALERTS**

This Manual Dial Alert advises that the placing of your current call exceeded the time allowed for dialing, as is set in your campaign. Please alert you manager if you see this message, and make note of the phone number you were trying to dial.

Depending on how your campaign has been configured, you may also see one of these other alerts while trying to place a manual dial phone call:

- "This phone number is in the DNC list"
- "No more leads in the hopper for campaign"
- "This lead has exceeded its daily call count limit"
- "This phone number is not in the campaign lists"
- "This phone number is not in the system lists"
- "This phone number is not a callback"
- "This phone number is outside of the local call time"
- "This phone number is at the 24-hour call count limit"
- "The next lead is a DNC phone number, please try again"
- "The next lead has exceeded its daily call count limit, please try again"



**Figure 48. Check-for-call Running Alert**

## ***CHECK-FOR-CALL ALERT***

If you are logged into a campaign that is not only manual dial calls, sometimes you may encounter a “CHECK-FOR-CALL” Agent Alert box appearing on top of the call control buttons if you pause your session. What this is doing is ensuring that there are no calls on their way to your session when you clicked to PAUSE your session. You can either click OK to make this alert panel go away and try again, or wait a few seconds for it to go away automatically.

## ***AUTO-DIAL MODE***

Auto-Dialing mode is when you are only sent calls that have been answered. You will not receive *Busy, Disconnected, Invalid number* or *Ring-no-Answer* calls. Optionally, OCDialler can also avoid sending most answering machine and voicemail answered calls. Because of this, you will not hear ringing of the phone. You will simply hear a quick “bloop” sound when the customer is connected to your session.

## ***CALL CONTROL***

The YOU ARE PAUSED and YOU ARE ACTIVE buttons at the top left of the screen are known as the call control buttons. When you log into a campaign in auto-dial or inbound/closer mode, the YOU ARE PAUSED button will be yellow, indicating that you are in Pause. This is known as the “paused state”. Once you click on that button, you are available to start taking calls, and the button changes to YOU ARE ACTIVE. When you are ready to pause, just click on that button again to stop receiving calls. You may also click the optional “Next Call Pause” link below this button, or select the PAUSE AGENT DIALING checkbox on the disposition screen to Pause yourself immediately after submitting the disposition for that call.

## ***PAUSE AND RESUME PROCEDURE***

If you wish to go on a break or log out at the end of your shift, you will need to be Paused to click on the LOGOUT button in the top right corner. If you haven't done this and leave from disposition screen or just close the web window, your login and activity time may not be recorded accurately. In addition,

calls may still be made for several minutes because the system is not aware you have logged out. If you are experiencing a high call volume, or you have no delay between when you hangup one call and receive the next, it would be a good idea to use the “PAUSE AGENT DIALING” checkbox on the call disposition screen, or click the optional “Next Call Pause” link below the YOU ARE ACTIVE button if your manager has enabled that feature for you.



Figure 49. OC Dialer In-group/Email/Chat Group Selection Screen

## ***INBOUND AND CLOSER FEATURES***

If you will be working as an inbound closer, email, chat, or blended inbound/outbound campaign, you will need to login to an inbound enabled campaign. Depending on how the campaign is set up, you will be able to take calls and/or messages from many different sources. Unlike outbound-only campaigns (where you can only be in one outbound queue at a time) you can take calls from multiple In-groups and/or email groups all during the same session. The call control procedure (pause/resume) for inbound and closer campaigns is the same as it is for outbound auto-dial campaigns.

## ***LOGIN SELECT GROUPS MENU***

When you log into a CLOSER-type campaign (depending on how your manager has configured it) you will see a green screen that will show a list of inbound, email and chat groups to select from. This will determine which inbound groups you wish to take calls and/or messages from (see Figure 48). The

ability to choose may also be disabled. In this case your manager has already pre-selected the groups you will receive calls from. Also on this screen may be the option to select the “BLENDED CALLING” checkbox. This box allows you to be able to take outbound calls, when not on an inbound call. Ask your managers whether you should click on BLENDED or not when you log in if you see that option available.

## **DISPLAY AND CALL INFO**

Inbound and Closer campaigns have some special display features that are not in regular auto-dial campaigns. When you receive an inbound call, you will see the color and In-group name associated with that call in the status bar (toward the top of the screen). If the call is a closer call from a frontier agent on another OCDialler campaign, the status line can be setup to show their name and User ID number for tracking purposes.

## **RING ALL**

In most cases, the inbound call notification is identical to an outbound Auto-dial campaign. You would hear an alert, and the customer is immediately transferred to your session. However, your manager can alternately enable the “RING ALL” feature. When this feature is enabled and a call is received, all of the phones in the In-group will ring. The first person to answer gets the call.

## **IN-GROUP MANUAL DIAL**

This feature allows you the ability to place manual dial outbound calls that are logged as In-group calls assigned to a specific In-group. Depending on how your manager has configured this feature, the options may differ. It can allow you to place phone calls out through an In-group and back to yourself. Optionally, it may allow you to log time on a call that does not exist, as if it were a real call (most often used for logging email or faxing time). It can also be setup to allow both of the above. See Figure 37 for an example.

## **INBOUND CAMPAIGN LEAD SEARCH**

If your manager has enabled this feature on the campaign, you can search for a specific customer lead while in the middle of an inbound call. Once you select “LEAD SEARCH” it is identical to the Paused lead search. You can search by using either the Main, Alternate or Address3 phone number, and any combination of the following data : *Lead ID, Vendor ID, First Name, Last Name, City, State, and Postal Code*. We recommend Main phone number, Lead ID, or Vendor ID, as they yield the fastest results. These fields do not allow for wildcard or partial search terms. Once you click Submit, the system will display a results page showing the lead or leads that meet the given criteria. From that page you will select the customer lead and that information will replace the data that was previously on your screen. See Figure 35 for an example.



Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP

TERRITORIES GROUPS LOGOUT

2016-11-17 14:41:26 session ID: 8800051  
Calls in Queue: 0 Emails in Queue: 0

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER **LIVE EMAIL**

STATUS: Incoming -- Group- Dev test email UID: noreply-google-plus@google.com List: 200 seconds: 20 refresh

**DIAL NEXT NUMBER**

LEAD PREVIEW

ALT PHONE DIAL

Next Call Pause

RECORDING FILE:

RECORD ID:

**START RECORDING**

WEB FORM

WEB FORM 2

WEB FORM 3

PARK CALL

IVR PARK CALL

TRANSFER - CONF

QUICK TRANSFER

CUSTOM TRANSFER

RE-QUEUE CALL

**HANGUP CUSTOMER**

ND DTMF

Date received: 2016-05-10 08:26:20

From: noreply-google-plus@google.com

Subject: Top suggested Google+ Pages for you

Message: Top suggested Google+ Pages for you Mike, here are some posts from Pages you might like on Google+ The Walking Dead Shared publicly Follow Happy Birthday to #TWD's Austin Nichols add your birthday messages below! image not displayed 371 9 71 This notification was sent to mjc.droid@gmail.com. Don't want occasional updates about Google+ activity and friend suggestions? Unsubscribe from these emails. Google Inc., 1600 Amphitheatre Pkwy, Mountain View, CA 94043 USA

Response: RE: Top suggested Google+ Pages for you

Reply:

COPY MESSAGE >>>

Attachments: Choose File No file chosen

VERSION: 2.12-500c BUILD: 161109-2221 Server: 192.168.198.5

Show conference call channel information [Hide Calls In Queue](#) **HOT KEYS INACTIVE** **MUTE** Agents View +

**Figure 50. OCDialler Inbound Email Screen**

## EMAIL

OCDialler can handle inbound email in the agent screen just like it handles phone calls. If your manager has enabled this feature, you will be able to handle this correspondence. The ability to choose may also be disabled. In this case your manager has already pre-selected the groups you will receive correspondence from. Like In-groups, you can staff multiple email groups at the same time.

When you receive an email, you will see the color and Email Group name associated with that Email Group in the status bar (toward the top of the screen). Once you have completed your response to the email click the REPLY button at the bottom of the EMAIL tab to send the email response you have entered, and proceed to the disposition screen. After submitting the disposition you will be available to take new emails or calls, depending on how you have logged into the system. If you are in an auto-dial campaign and want to go into PAUSE before receiving your next call, select the PAUSE AGENT DIALING checkbox before selecting your status. This assures you will be in PAUSE after dispositioning the email, and you do not immediately get another call.



**Figure 51. Customer Website Chat screen**

## **CHAT CUSTOMER**

OCDialler can handle chat messaging with customers on websites that have our chat software on them. This feature allows real-time text-based communication directly with customers, and is conducted through the CHAT CUSTOMER tab on your agent screen. You can type your messages to the customer in the bottom text entry panel, and either press Enter on your keyboard to send the message, or use the SEND MESSAGE button. When you are finished with your chat session with that customer, just click on the HANGUP CUSTOMER button to go to the disposition screen. As with most things within OCDialler, all customer chat messages are logged in the system and can be searched by managers.

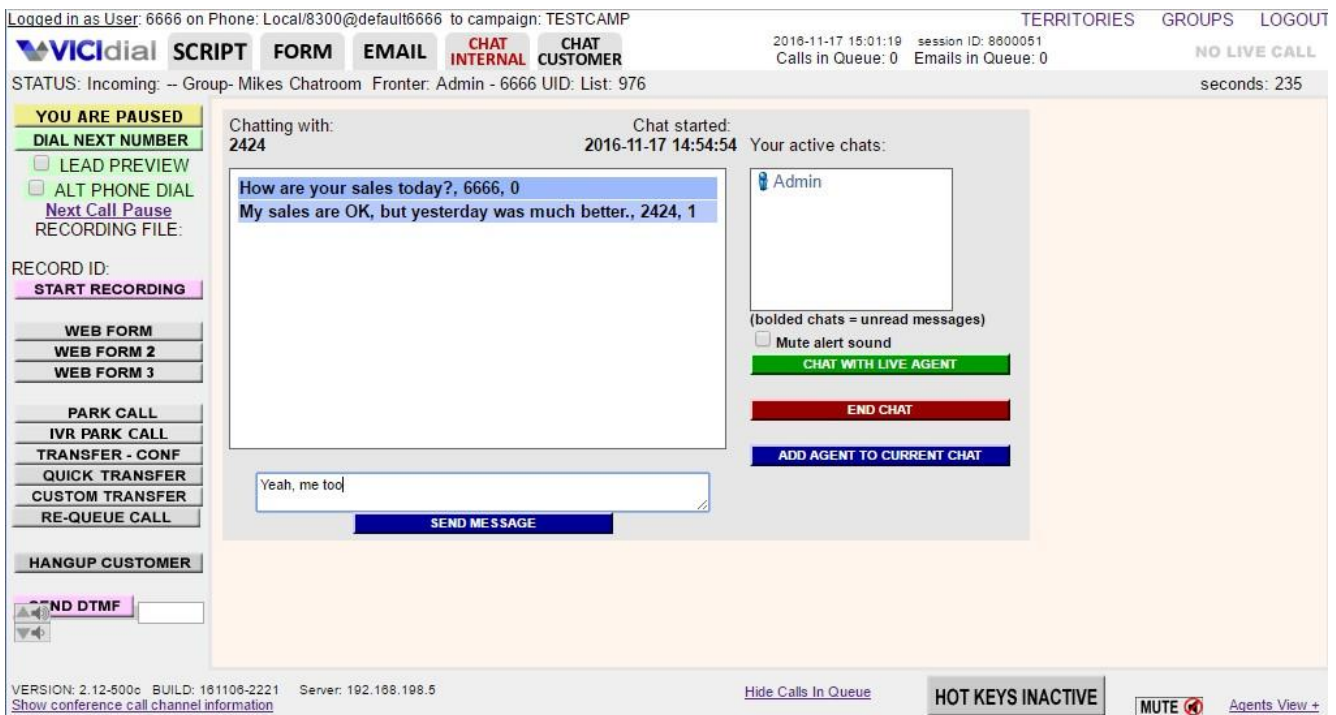
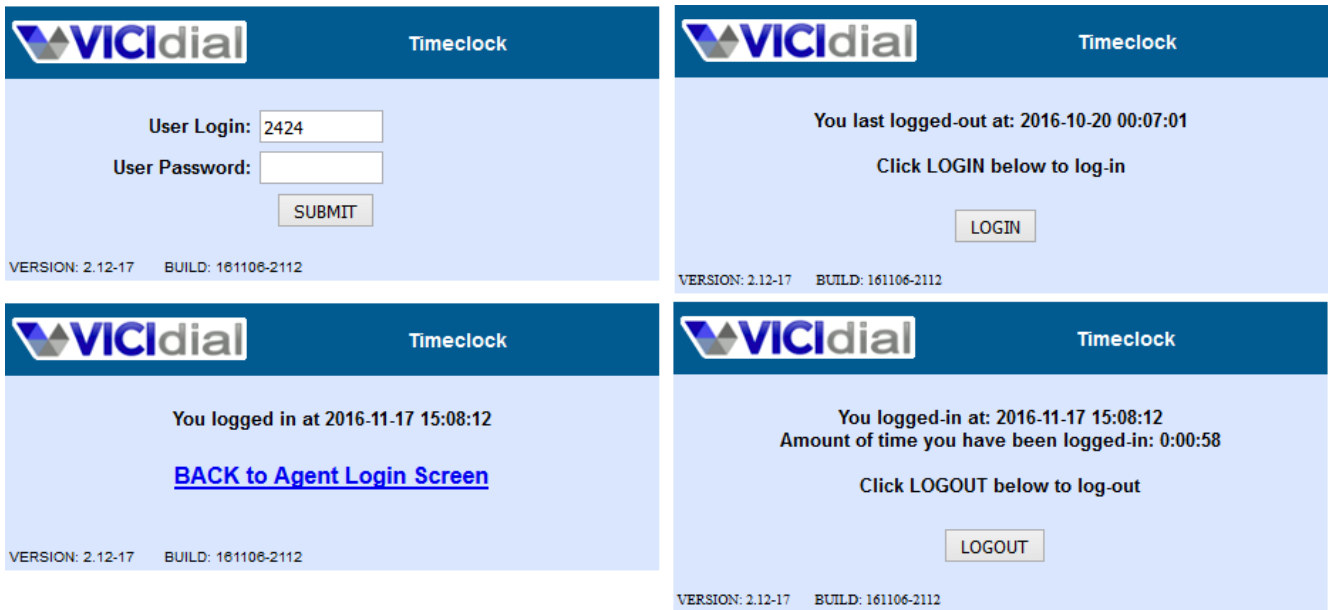


Figure 52. Internal Chat screen

## CHAT INTERNAL

In addition to chatting with customers, you also optionally have the ability to chat with other agents and managers through your agent screen. These internal chat sessions take place using the CHAT INTERNAL tab in your agent screen. To start a new internal chat, click on the CHAT INTERNAL tab, then click on the green CHAT WITH LIVE AGENT button, select the agent you want to chat with, type your first chat message and click to send the message. Then you will see a screen similar to the one in Figure 51. You also have the ability to have several internal chats going on at the same time. To switch between the different internal chats, just click on the one you want to open in the “Your Active Chats” window in the top right side of the CHAT INTERNAL tab. When you are finished with an internal chat, just click on the red END CHAT button. As with most things within OCdialler, all internal chat messages are logged in the system and can be searched by managers.



**Figure 53. OCDialler Timeclock**

### ***Time-Clock Punch-in Punch-out***

Included with OCDialler is an independent timeclock application that allows agents to clock-in and clock-out separate from the call-handling agent screen. The OCDialler Agent Login screen can also be restricted to allow only timeclock clocked-in agents if your manager has set this for your user group.

To properly clock-in is a 2-step process. First, enter your user Login and Password and click submit. You will then see a notice of the last time you clocked-out with a LOGIN button below. Lastly, you must click the LOGIN button to fully clock-in to the system. Clocking-out of the system is the same process (see figure 52).

Logged in as User: 6666 on Phone: Local/8300@default6666 to campaign: TESTCAMP TERRITORIES GROUPS LOGOUT

**VICIdial** SCRIPT FORM EMAIL CHAT INTERNAL CHAT CUSTOMER 2018-11-17 12:28:45 session ID: 8800051  
 Calls in Queue: 0 Emails in Queue: 0 **LIVE CALL**

STATUS: Incoming: 312-555-1212 Group- TEST inbound 3 Fronter: Admin - 6666 UID: Y1171228340001139739 List: 929 seconds: 13

Soundboard Test refresh

**Charity Soundboard** stop audio

OPENING	MONEY ASKS	REBUTTALS	Q and A
Hello	YES TOP SPOTS	Wants Mail Only	800 number
Good Morning	REPEAT 55-45	Husband - Wife Do It	RPI - PFR
Good Evening	Not sure 35-25	How Does This Work	Im in Training
Good Afternoon	20-15 ASK	How Much Time	BAILOUT
INBOUND CALL	10	NAME OF SPOTS	Supported Programs
FIND ADULT	FINAL ASK - NO\$\$	Did This Already	Tax Status
Wrong Contact	INFOKIT ASK	Gave to Different	STATE - NATION
RESCHEDULE	YES TO INFOKIT	Count on Your Support	Donation Percent
CALL ME BACK			Who is GAFOP?
			Where are you located?
			Company name
			Website
			President
			How did you get my #
			Org Location

HOTKEYS	FINAL
Uh-huh	Are you 100% sure?
Okay	Add to DNC list
Repeat that	Transfer to Validation
Thank you	(Please hold on)
Im glad to hear that	
Great	
Laughing	
No Problem	
Im sorry	
I understand	
Hold on Just 1 sec	
No	

VERSION: 2.12-500c BUILD: 181108-2221 Server: 192.168.198.5 NO ACTIVE CALLBACKS Hide Calls In Queue HOT KEYS INACTIVE MUTE Agents View +

Figure 54. Agent Soundboards

## Agent Soundboards

Agent Soundboards are special scripts that allow you to play pre-recorded audio to customers by clicking on buttons within the script.

When you roll your cursor over a button, it will turn yellow. If you click on a button, it will turn green, and a message will start to play. At that time, you will also see the red “stop audio” button at the top of the script start a count-down timer letting you know how much time the audio recording has left before it is finished. If you want to stop the audio before it is finished, simply click on that “stop audio” button. If you want to start another audio file before the one that is playing, just click on the new audio file button and the current audio will stop and the new one will start playing.

The screenshot shows the top section of the VICIdial agent interface. At the top, it displays the user's login information: "Logged in as User: 6666 on Phone: IAX2/cc350(ring) to campaign: TESTCAMP". Below this is the VICIdial logo and a navigation menu with buttons for "SCRIPT", "FORM", "EMAIL", "CHAT INTERNAL", and "CHAT CUSTOMER". The main area is titled "STATUS:" and contains several elements: a yellow "YOU ARE PAUSED" button, a green "DIAL NEXT NUMBER" button, and two unchecked checkboxes labeled "LEAD PREVIEW" and "ALT PHONE DIAL". Below these is a "Next Call Pause" link. To the right, there are fields for "Customer Time:", "Channel:", "Customer Information:", "Title:", "First:", "MI:", and "Address 1:". A "ring" link is visible in the phone number "IAX2/cc350(ring)" in the header.

Figure 55. On-Hook Agent Phone “ring” link

## ***On-Hook Agent Phone***

For agents not on auto-dialing campaigns, that handle few calls through the day and want to hear their phones ring when OCDialler calls are coming in, there is an option to use an On-Hook Agent Phone instead of logging in to the agent screen with a standard always-off-hook agent phone. When an agent logs in to the agent screen with one of these phones, their phone will not ring. If the agent wants to place a OCDialler manual dial phone call while logged in with an On-Hook phone, they will need to click on the “ring” link at the top of their agent screen (see Figure 54).



## **LOGGING INTO OCDialler OUTSIDE OF THE OFFICE**

OCDialler is capable of allowing agents to login and use the dialer from a remote location. All that is needed is a reliable computer with a good Internet connection and a web browser, and a soft-phone (or any phone setup as a local extension on the dialer) or a regular land line phone with the ability to be called from a regular phone number.

### **WEB LOGIN**

First you must bring up your web browser. Firefox 1.0 or higher is suggested, but OCDialler has been tested with Opera 9.0, Netscape 9.0, Google Chrome 4.0 and Internet Explorer 6.0+ as well. Microsoft Internet Explorer versions prior to 6.0 are not supported. If you are using Firefox version 1.5 or higher, please make sure to go into Firefox settings and disable all auto-updating features and disable all check-for-updates features. Those features can stop OCDialler from working.

Once your web browser is up, you must go to the web page address that your manager gave you and enter in the "Phone Login" and "Phone Password" that your manager gave you when they setup your remote account. After entering the phone information you need to enter your user login and password as well as choose the campaign that you want to login to then click submit.

At this point your OCDialler.php web page should start loading the agent screen and after a few seconds the phone will ring (see next section for phone information). Pick up your phone and you are logged into OCDialler.

Firefox also supports the optional OCDialler Web Dial browser plugin. This allows right-click selection dialing of phone numbers on web pages to a logged-in OCDialler Agent session within the Firefox web browser.

### **PHONE ISSUES AND OPTIONS**

Using OCDialler remotely gives you a lot of flexibility, including what kind of phone you use. Depending on what your manager allows, you will either be able to use your home land line phone, a computer soft-phone, a VOIP hard-phone or even possibly your cellphone. If you are using your home phone or cellphone, you only need to give your manager the 10-digit phone number of the phone you want to use remotely. If you will be using a VOIP hard-phone, you should be receiving a phone that is already setup by your manager and that you just need to plug into a broadband Internet connection to get it to work. If you will be using a soft-phone, your manager will probably give you a set of instructions to set it up on your computer and some possible suggestions for microphone headsets to use with your computer. If you are using a soft-phone or web-phone and you are having issues with your phone, one of the first steps you might want to take is to reboot your computer to see if that fixes the issue before trying other troubleshooting methods. Another common issue is audio quality issues when using a WiFi, we usually recommend an Ethernet network connection to your phone or computer, especially when there are multiple agents connecting in an office.

No matter what kind of phone you will be using, it is important that you get the Phone Login and Phone Password from your manager when they have set your phone up so that you will be able to log in properly.

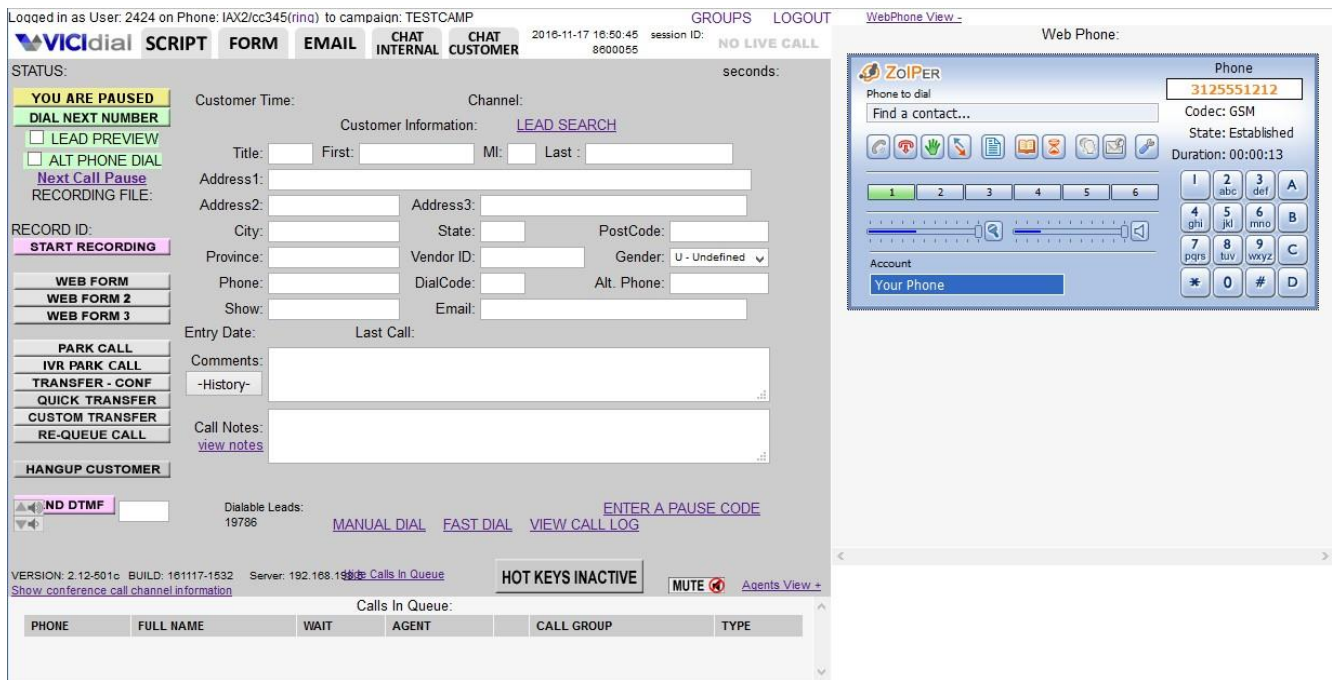


Figure 56. Zoiper webphone integrated into web browser

## USING THE ZOIPER WEBPHONE

OCDialler has been designed to optionally integrate and support the The Zoiper web phone. Rather than running a separate soft phone program alongside the system, Zoiper's web phone inside you agent browser window. It operates in the top right-hand side of the screen and offers the same functionality as their soft-phone. It can also be configured to run in a thin bar across the screen, taking up much less room.

The Zoiper webphone only works on old Windows OS machines, and we recommend installing it with Microsoft Internet Explorer, and using it with the Firefox web browser. For newer web browsers, we recommend using the OCWebRTC Phone WebRTC phone instead. OCWebRTC Phone is described in the next section.



Figure 57. OCWebRTC Phone WebRTC integrated into the web browser

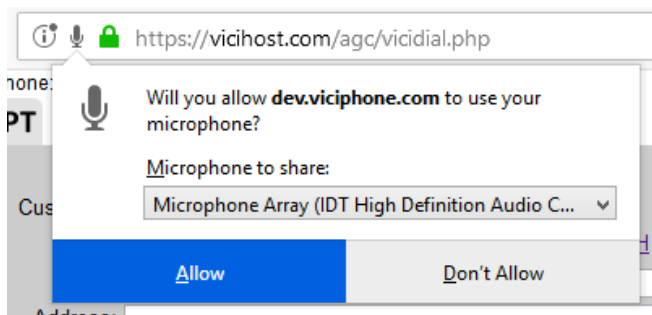


Figure 58. OCWebRTC Phone WebRTC Browser permissions

## USING THE OCWebRTC PHONE

Another better option for using a phone built right into your OCDialler Agent Screen is the OCWebRTC Phone WebRTC phone. This kind of agent phone works with newer web browsers only (like Chrome and Firefox) and does not require any installation to use, you only need to allow permissions for OCWebRTC Phone to use your computer's microphone.

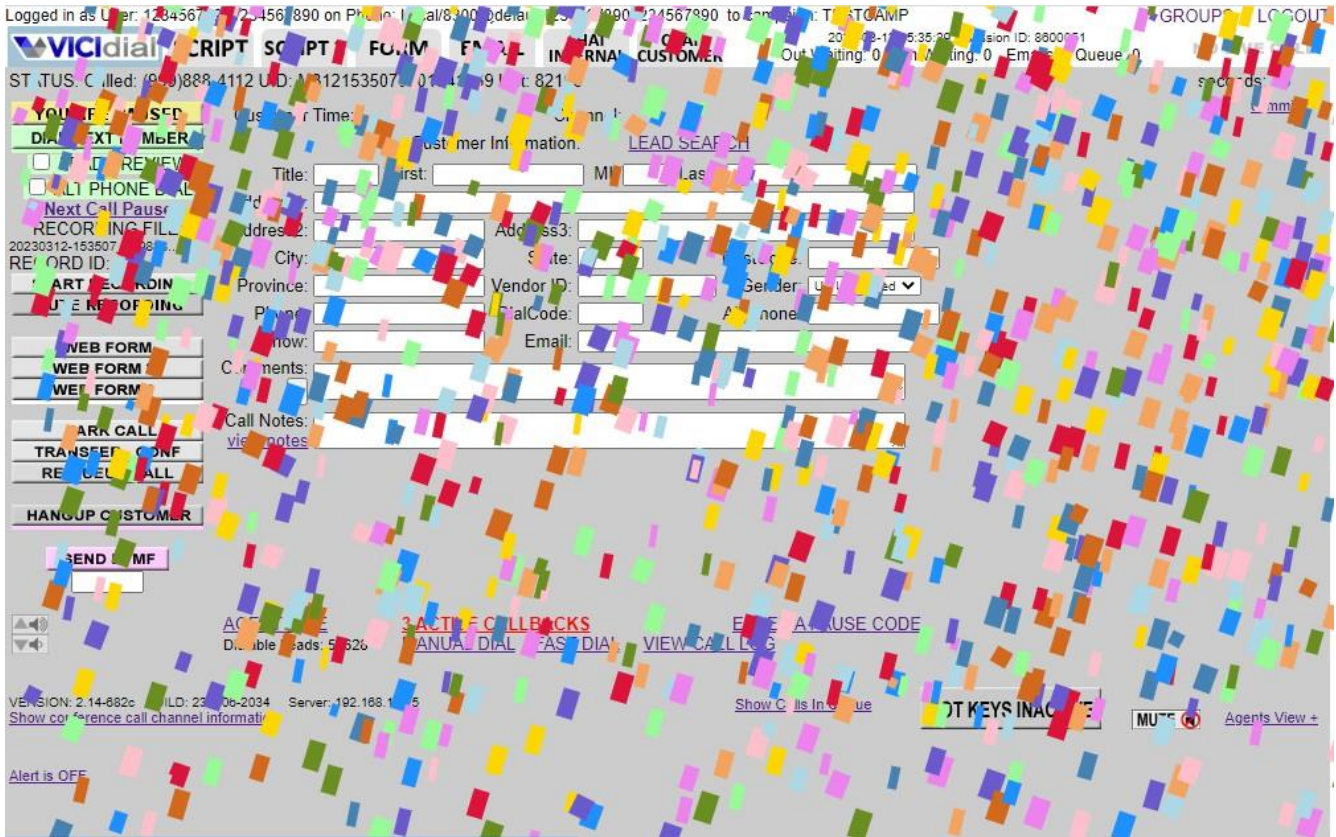


Figure 59. OCIdialler Agent Screen with confetti falling after a sale

## CONFETTI DISPLAY

One optional campaign feature that can be activated for the agent screen is a confetti display that can briefly appear on the agent screen after the agent has dispositioned a call with a status that is flagged as a SALE and/or a CALLBACK in the system.

## **EXTERNAL USER ISSUES**

While using OCDialler from a remote location like your home, another office or a hotel offers a great amount of flexibility, there are some issues to be aware of. Foremost is the quality of your Internet connection. Many home broadband Internet connections like DSL or Cable use a shared architecture, meaning that you do not have guaranteed bandwidth or consistent speed at any given time. This means that if several people in your area are using a lot of bandwidth, you may have problems with your OCDialler operations like crackly audio, dropped calls or even the OCDialler agent screen webpage failing to load properly. When you have that kind of problem, especially in a home environment, there isn't always a lot you can do aside from calling your Internet provider and complaining.

## **WEB BROWSER AGENT SESSION PAUSING ISSUES**

Starting in January of 2021, Chromium-based web browsers (like Google Chrome and Microsoft Edge) added new default functions to reduce power usage of web browser tabs and windows that are hidden from view. They achieved this by reducing how frequently javascript processes can run on browser tabs and windows that are not in view. For the OCDialler Agent Screen, this means that if your agent screen is not always in view on your screen, it might not be communicating with the OCDialler server as often as it needs to, and you may be paused or logged-out within 1 minute of switching to a different tab or window.

If you are having these problems, we suggest having your manager look at the document below, and the available options that are explained in it for which may be the best options for your organization, [http://OCDialler.org/docs/WEB\\_BROWSER\\_JAVASCRIPT\\_THROTTLING.txt](http://OCDialler.org/docs/WEB_BROWSER_JAVASCRIPT_THROTTLING.txt)

## **MANAGER FUNCTIONS**

Managers of a OCDialler system have a great deal of information that they can look at involving agent operations, stats and current status. A manager can tell how long an agent was paused, how long they waited, how long they talked and how long it took to disposition each individual call. Managers can even see how much time the Agent Screen was visible and how much time it was hidden on your screen. They also have access to login/logout times and the status of every disposition of every call an agent has ever made. Managers have the ability to listen in on all conversations, barge into those conversations and talk, hangup an agent at any time and grab the customer they are talking to, and deactivate the agent account at any time. Also, in some setups a manager will have access to recordings of agents when they are logged in, including pause, wait, talk and disposition time.



# CLOSING

OCDialler is a very flexible contact center solution that is user-friendly and highly configurable. If you run into any problems while using it, you should contact your manager or system administrator.

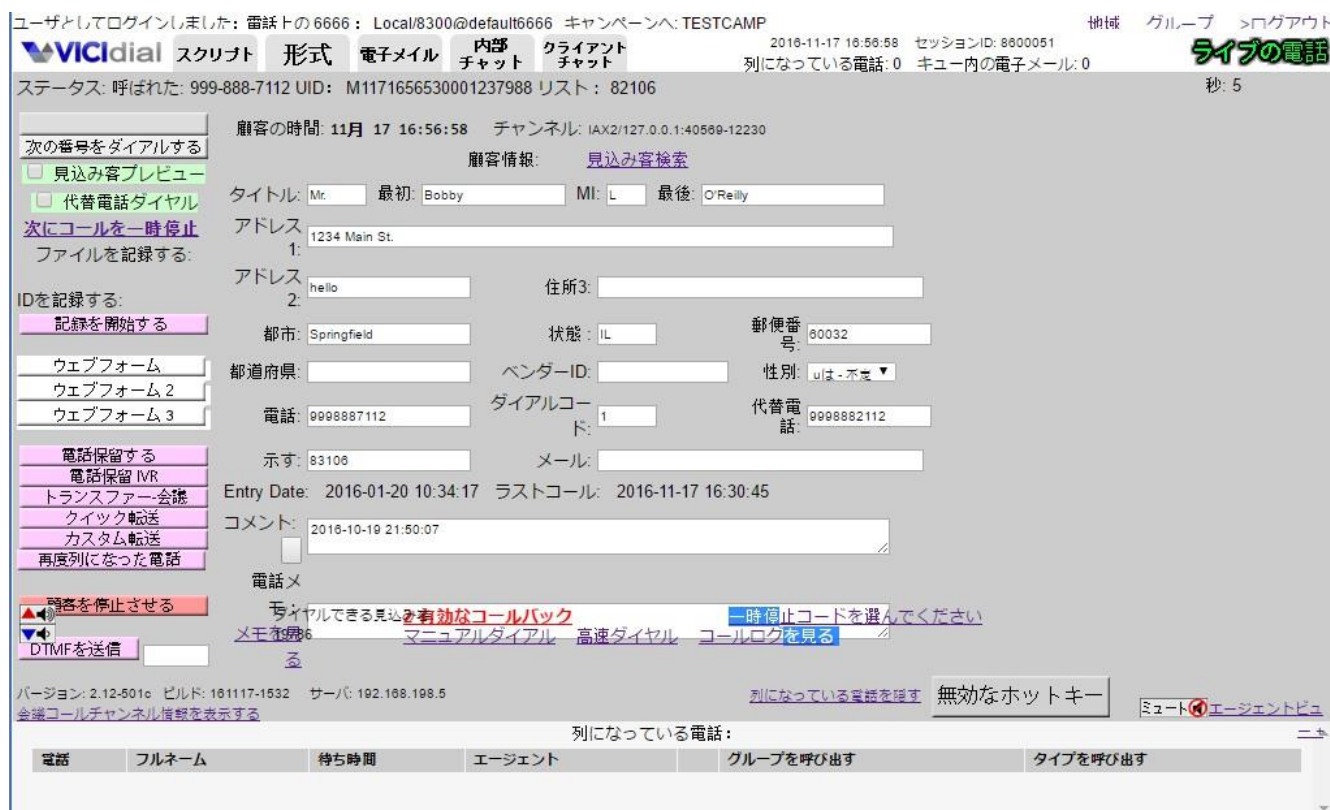


Figure 60. Screenshot of the Japanese translation of the OCDialler agent screen



## **FREQUENTLY ASKED QUESTIONS(FAQ)**

### ***- I logged in and there was already an agent in my session, what happened?***

Usually this happens when that other agent did not log out correctly or did not hangup their phone. Tell your manager what session ID you have and they can lookup who the other agent is and hang up their extension.

### ***- How much delay is there before a customer gets to my phone?***

This depends on several things. If you have been waiting for a call for more than 3 seconds, there is a good chance that there was less than a second of delay while the customer was transferred to you. If it was a very quick transfer after you just logged in or dispositioned a previous call, then there is a good chance that the customer may have waited two or more seconds before you(the next available agent) was able to take their call. The exception to these is if your system has Answering Machine Detection(AMD) enabled. If that is the case, there can be a one-half to two second delay on all calls getting to an agent. Your manager should know if you have AMD enabled for your campaign.

### ***- What about Answering Machines and detecting them?***

As mentioned in the question above, Answering Machine Detection adds a delay to the customer getting to you. Some managers may disable this so that there is no delay. One other option that they may use to reduce the number of Answering Machines sent to agents is to set the ring time to 4 rings, which will eliminate over half of the Answering Machines and Voicemail boxes that would normally be sent to agents.

### ***- What Internet web browsers work with OCDialler?***

We recommend Firefox and Chrome as our browsers of choice, although we have tested successfully with Opera, Google Chrome and Microsoft Internet Explorer 6.0+. With Firefox, we have had OCDialler sessions running for several days successfully in the same web browser window. If you are using Firefox version 1.5 or higher, please make sure to go into Firefox settings and disable all auto-updating features and disable all check-for-updates features. Those features can stop OCDialler from working at times.

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