Switchboard tab

The Switchboard tab is aimed for Agents that are using the Agent Application mainly as a tool to answer phone calls and to distribute them further in the organisation to other agents, external contacts or queues. The tab is meant to be used in a full tab view due to the amount of information that will be presented at the same time.

> **Note**
>
> It's recommended that the phone tab is disabled in Admin if the Switchboard tab is to be used! Contact support if you require assistance.

Functions and layout

Call control

The call control handles ongoing calls and displays call information for the Agent.

While the Agent is not engaged in a call the **Call Control** will display a clock icon and *"Waiting for a call..."* text:

Puzzel. SOLVING Customer Interactions
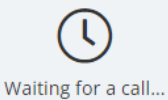
Once the Agent is engaged in a call the view changes and more information and buttons are displayed. Call status is displayed together with the caller's number as well as call details. To configure what details to show please contact Puzzel.

● IN CONVERSATION with 0046709█████

Sensitive	Normal	Long Text	Empty
🔒 Sensitive	Normal	Some long text, that should be wrapped when showing in call details.	
Caller	**Has Called**	**Queue_key**	**Agent_names_list**
████████	██████	Press 2	Agent 1, Agent 2
Sec_to_hhmmss	**Millisec_to_hhmmss**	**To_date_time**	**To_date**
1:00:00	1:00:00	18/1/2017 21:00	18/1/2017
To_date_month	**To_time**	**Cmd_more_calls**	**Cmd_url**
18 January 2017	21:00		1881
Cmd_url2	**Cmd_url3**		
↗	https://www.1881.no/?query=99291429		

Censor   Hold   Hang Up

While in a consult call:

🎧 🔴 **ON HOLD** 004670940... | **IN CONSULTATION** with 00467356...

Sensitive	Normal	Long Text	Empty
🔒 Sensitive	Normal	Some long text, that should be wrapped when showing in call details.	

Caller	Has Called	Queue_key	Agent_names_list
		Press 2	Agent 1, Agent 2

Sec_to_hhmmss	Millisec_to_hhmmss	To_date_time	To_date
1:00:00	1:00:00	18/1/2017 21:00	18/1/2017

To_date_month	To_time	Cmd_more_calls	Cmd_url
18 January 2017	21:00		1881

Cmd_url2	Cmd_url3		
🗗	https://www.1881.no/?query=99291429		

Stop · Unhold · End consultation · Transfer · Hang Up

Icons and buttons:

📞 - Answer an incoming call.

📵 - Reject an incoming call.

📵 - Hang up and End Consultation.

⏸ / 📵 - Put caller on hold/Unhold caller. Also used for call pending or conference call depending on configuration.

〰 / 〰 - Censor an ongoing recording/Stop censoring.

→ - Transfer call to consultee.

⏺ / ⏺ - Start recording a call/End recording.

🔴 - Call is being recorded

🎧 - A supervisor is monitoring the call

Note

Some buttons or icons may not be available due to configurations made via the Admin Portal.

Queue Overview & Call Queues

When an agent is not engaged in a call the **Queue Overview** is shown:

QUEUE OVERVIEW

Queue Name	In Que...	Scheduled	Max Wait Ti...	Agents	🟢	🔴	🟡	SLA Sco...	Avg. Wait Ti...	Offered	Answer...
> Automatic Test	0	0	0s	0	0	0	0		0s	1	1
> Automatic Test 2	0	0	0s	0	0	0	0		0s	0	0
> Automatic Test 3	0	0	0s	0	0	0	0		0s	0	0
> Calls	0	0	0s	14/1	9	2	3	0	0s	21	19
> Chat sales	0	0	0s	0	0	0	0		0s	0	0
> Chat secret	0	0	0s	1	1	0	0		0s	0	0
> Chatbot	0	0	0s	2	2	0	0	0	0s	0	0
> Dialler Test Queue Press 3	0	0	0s	3	3	0	0		0s	0	0
> E-mails	0	0	0s	14	9	2	3		0s	0	0
> En veldig lang kø Дейност в брау...	0	0	0s	0	0	0	0		0s	0	0
> Facebook	0	0	0s	0	0	0	0		0s	0	0
> Human Chat	0	0	0s	0	0	0	0		0s	0	0
> Krastiyan's Queues	1	0	2d	0	0	0	0	9	2d	0	0
> PCM - Agent Dev	0	0	0s	0	0	0	0		0s	0	0
> Press 0	0	0	0s	1	1	0	0		0s	0	0

It's possible to click the numbers that are displayed as links to further drill down and display more information.

QUEUE DETAILS

← Back   Press 2

Category	Queue	Description	
∨ 1	Press 2		⬆
From			004670 ▓▓▓
SLA Score			
Wait Time			33s
VIP			0
Scheduled			
Callback			0
Agent			

> **Note**
>
> The displayed columns for the Agent is set in the Admin Portal.

Once the agent is engaged with a call the **Queue Overview** is replaced with **Call Queues**. The Call Queue offers a quick way for agents to transfer calls to queues or directly to agents associated with a certain queue. It also displays the status of the queue, agent availability and if the queue is open or not based on associated time module configuration.

CALL QUEUES

Queue Name	In Queue	Max Wait Time	Agents	●	●	●		
Automatic Test	0	0s	0	0	0	0	→?	→
Automatic Test 2	0	0s	0	0	0	0	→?	→
Automatic Test 3	0	0s	0	0	0	0	→?	→
Phone Sales æøå med et ganske så	0	0s	0/1	0	0	0	→?	→
● Press 0	0	0s	1	1	0	0	→?	→
● Press 2	0	0s	2	0	2	0	→?	→
● Press 3	0	0s	3	3	0	0	→?	→
● Press 5	0	0s	2	1	0	1	→?	→
Press 6	0	0s	1	1	0	0	→?	→
Press 7	0	0s	3	1	0	2	→?	→
● Press 8	0	0s	1	1	0	0	→?	→
Press Star	0	0s	1	1	0	0	→?	→
__PRESS_11	0	0s	14	9	2	3	→?	→
__PRESS_110	0	0s	14	9	2	3	→?	→
__PRESS_112	0	0s	14	9	2	3	→?	→

From the Call Queues view you can drill down to see the available agents for a specific queue to quickly transfer the call to a specific agent.

AGENTS DETAILS

← Back

__PRESS_11

Name ⌄	Status	Number	Profile	Group	Time		
Agent Smith	● Ready	1920	Press 6	Admin	1h 40m 16s	→?	→
Esben	● Ready	004673	Press Star	Admin	8d	→?	→
Farre	● Connected	Softphone	Press 2	Admin	3m 32s	→?	→
Lil K	● Ready	Softphone	Press 3	Admin	6h 59m 31s	→?	→
Nenk0	● Ready	1920	Press 5	Admin	1d	→?	→
Nenko2	● Dinner	1920	Press 5	Admin	2d	→?	→
Simeon	● Ready	Softphone	Press 0	Admin	1d	→?	→
Snoopy Doggy Dog	● Ready	Softphone	Press 3	Admin	7h 0m 3s	→?	→
Stoyka	● Ready	Softphone	Press 8	Admin	2d	→?	→
Tereza	● Ready	Softphone	Press 7	Admin	1d	→?	→
Terr Mih	● Smoke	Softphone	Press 7	Admin	1d	→?	→
YAVOR	● Ready	Softphone	Press 3	Admin	7h 0m 3s	→?	→
mihter2	● Lunch	Softphone	Press 7	Admin	1d	→?	→
tobias	● Busy	0701	Press 2	Admin	3h 57m 55s	→?	→

> **Note**
>
> The **Queue Overview** displays *display queues* rather than queue nodes, which calls can't be transferred to. Where as **Call Queues** will display available queue nodes that calls can be transferred to.

Icons and buttons:

⬆ - Pick a request from the Queue.

→? - Consult to Queue/Consult with an Agent.

→ - Transfer to a Queue/Transfer to an Agent.

● - Agent is available/Queue is open.

● - Agent is not available.

● - Agent is in a pause status.

● - Queue is closed.

Contacts & Calendar

The Contacts widget is where contacts from all sources that are available to a solution is found. You can see the contact's presence and details, transfer or consult calls to them, make outbound calls, and send messages in the form of email or SMS. It's also possible to send a message or make an outbound call to a manually entered number.

When transferring to a Puzzel queue or agent the option to add a transfer comment is available. When a comment is added the receiving agent will have the comment displayed to them.

The Contacts widget also have the capability to automatically make a search based on a variable captured by the IVR when the Agent receives a new call. For example the caller's phone number. The automatic search can further be narrowed down to only search from a specific source or a specific department in the Puzzel Catalogue. Please contact Puzzel support to receive assistance with the setup of this functionality.

When the messaging button is pressed a new window will open where the agent can author an email or SMS.

MESSAGE ✕

Message

This is an SMS message!

Characters: 44/320 Parts: 1/3

☑ Send as sms ☐ Send as email

SMS settings	E-mail settings

SMS RECIPIENT(S)   **SMS DISPLAY NAME**

+3598   Puzzel

SMS FOOTER

Regards // Puzzel

SEND

If the selected contact is from a search source where calendar information is supported a new widget called calendar will be displayed that consists of the contact's calendar. It's possible to select a specific date to see the calendar information of the selected date. If the selected date is anything other than the current date, the "today" button will be active and once pressed it will bring the view back to the current date.

If an appointment spans over multiple days it will be reflected on the appointment with the end date and time. If the selected contact is not currently free then an information text will be shown with the next available date and time the contact will be free. If enabled for the Puzzel Catalogue, the agents can add additional appointments for a contact directly from the switchboard tab.

CALENDAR

Today   ‹ Fri 28 Oct 2022 ›   *(Free on Friday 09 Feb at 12:30)*   ➕

‹   **October** 2022   ›

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

All day   Vacation
Ends Fri 09 Feb, 12:30

12:00 - 13:00   Lunch

Icons and buttons:

🔍 - Execute search.

📞 - Call contact or entered number.

 - Consult with contact or entered number.

 - Transfer to contact or entered number.

 - Open messaging window for contact or entered number.

 - Add calendar appointment.

● - Contact is available.

● - Contact is not available or busy.

● - Contact is in an away status.

> **Note**
>
> Certain contact sources may have additional icons!

Shortcut keys

Key	Description
CTRL+ALT+A	Answer Softphone call
CTRL+ALT+Z	Reject Softphone call
CTRL+ALT+X	Hang up
CTRL+ALT+E	Toggle Censor
CTRL+ALT+R	Toggle recording / Save pending recording
CTRL+ALT++	Transfer
CTRL+ALT+-	Start / End consultation
CTRL+ALT+H	Toggle on hold
CTRL+ALT+M	Open message window
CTRL+ALT+O	Call
CTRL+ALT+S	Focus on Search Field
ENTER	Execute search
SHIFT+ALT+O	Call contact
SHIFT+ALT+M	Open message window for contact
SHIFT+ALT++	Transfer to contact
SHIFT+ALT+-	Consult with contact

| Key	Description
SHIFT+ALT+C	Focus calendar
SHIFT+ALT+Q	Focus table

Adding a contact to Favourites

It is now possible to add a contact to your Favourites, allowing you quick access to your most used contacts.

Adding a new favourite contact can be done quickly and easily, by clicking the star button to the left of the contact name.
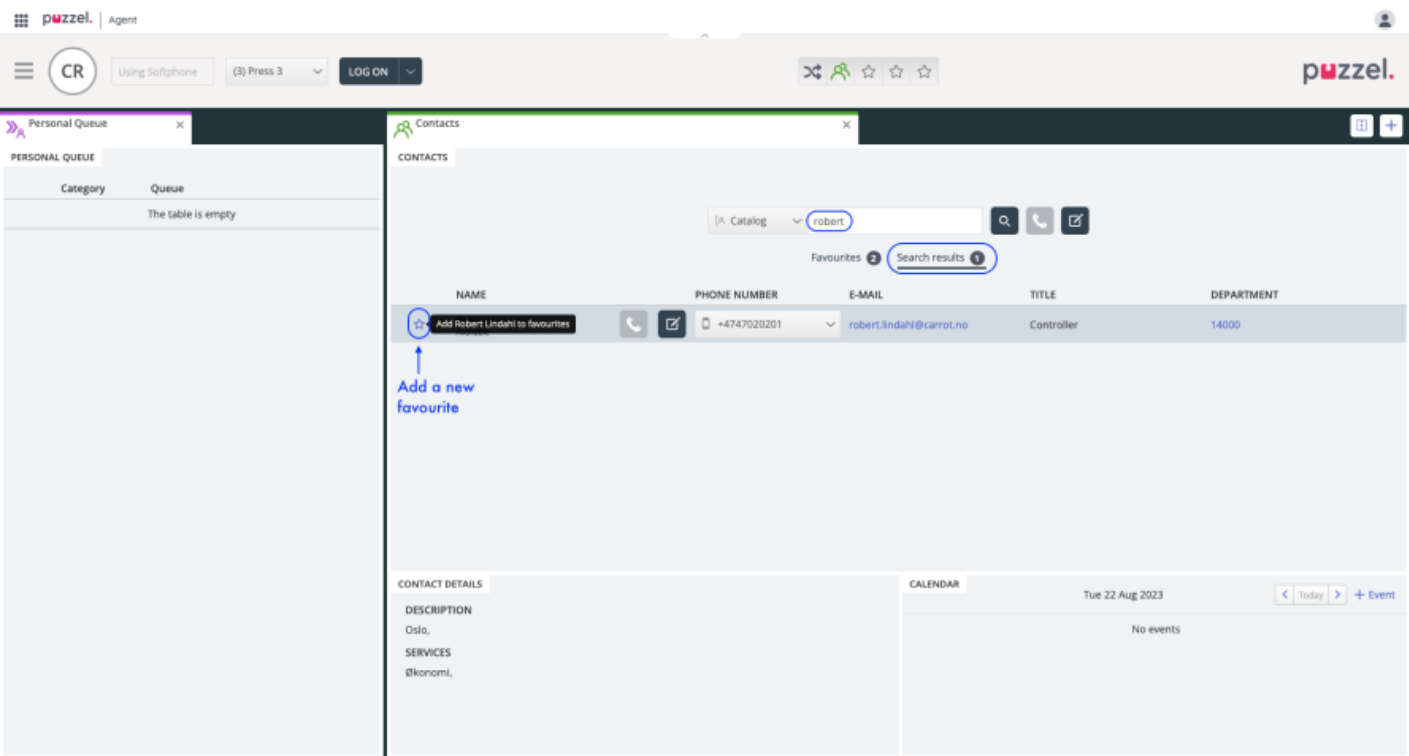
The contacts that have been added to your Favourites - either through the Agent Application or via the Admin Portal - will then appear in a new tab, which opens by default on the Contacts Tab.
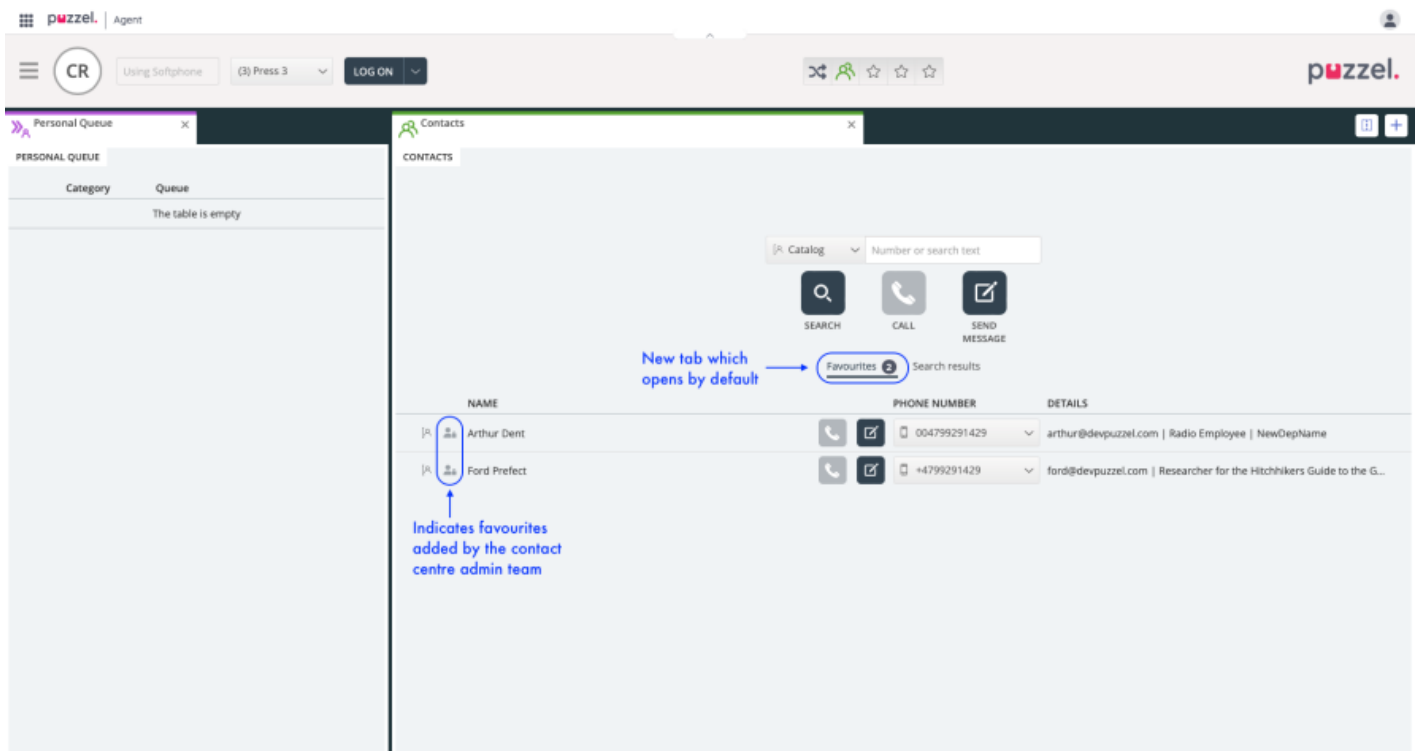
To remove a contact from Favourites, simply locate the contact in the FAvourites tab and click on the star icon again.
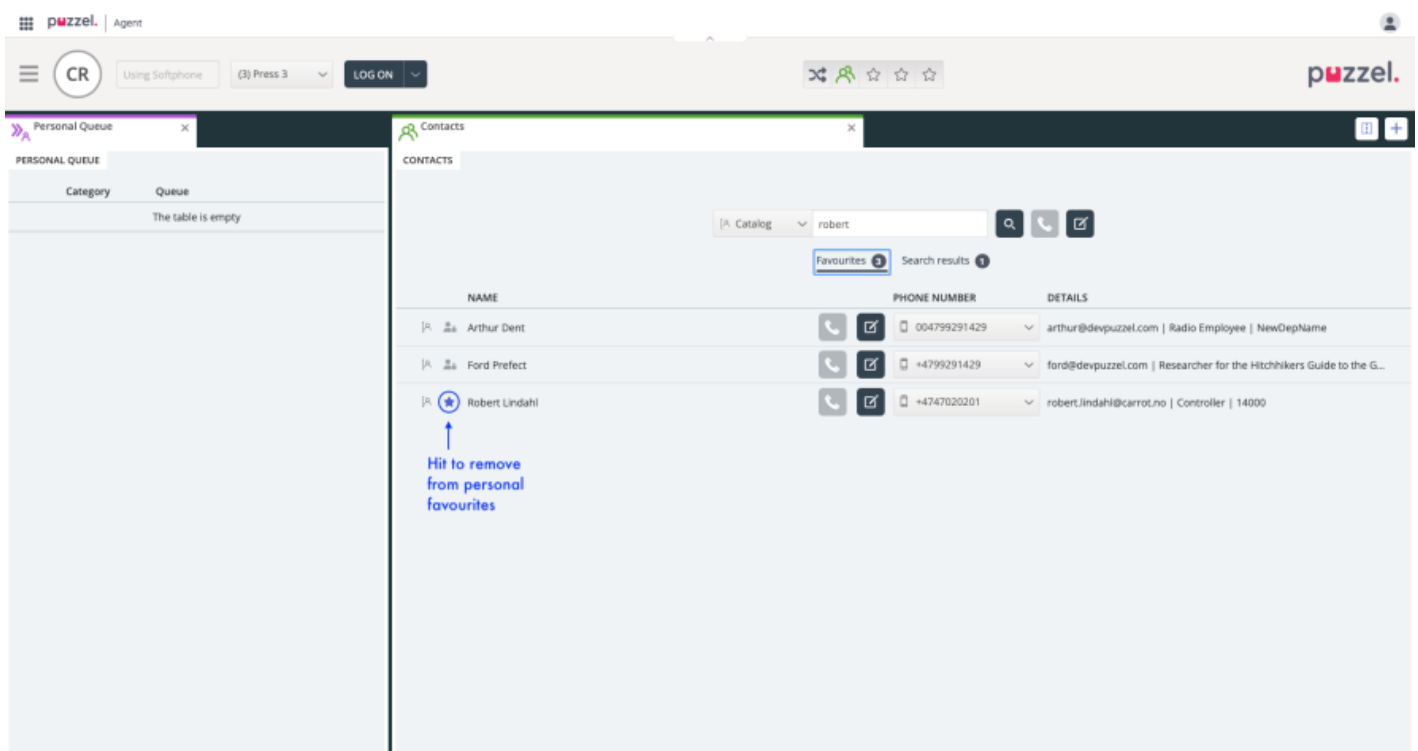
This functionality is also available in the Switchboard tab.