CONTERRA™ **NETWORKS**

Fiber Driven. People Powered.

Contact Center
Features Summary

Updated October 2024

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1 Data Center Features

Conterra Contact Center provides a rich set of routing options for many types of calls (defined below).

Conterra Contact Center currently provides two fully redundant data center locations for connecting into your network. All connections are established using SIP trunks via diverse carrier routes into the data center.

1.1 High Availability Server Architecture

The Conterra Contact Center provides a carrier-grade highly available architecture to ensure the highest level of service to mission-critical contact centers.

1.1.1 Core Component System Redundancy

Each of Conterra's data centers provide full core component system redundancy to provide your contact center with consistent connectivity. Our modular design allows for the removal of any one component without disrupting your network's overall level of service.

1.1.2 Geographical Survivability

In addition to internal redundancy, each data center provides full geographical redundancy, which means that each center can take over operations for the other in the case of a major outage or natural disaster.

1.1.3 24x7x365 Data Center Monitoring

Both data centers include hardware and software redundancy with full 24x7x365 monitoring to ensure your mission-critical contact center service is always carrier grade.

1.1.4 Automatic Software Updates

Because the Contact Center is a virtual service with no onsite equipment or software, you are protected against hardware and software obsolescence. You do not have to worry about software upgrades, patches, or new hardware installations.

1.1.5 TDM and VoIP — Network Agnostic

The Contact Center allows agents to use their existing telephony devices as their actual telephone. Supported telephony devices include hosted SIP phones, softphones, third-party PBXs, PBXs with SIP trunks, analog phones/home phones, and mobile phones.

1.1.6 On-Demand Scalability

Because the Contact Center is not limited by physical network constraints, increasing the size of your call center for seasonal agents or emergencies is a phone call away.

2 Routing Features

The Conterra Contact Center provides a rich set of routing options for many different types of calls.

2.1 Priority Queue Routing

Supervisors can set each queue priority from 1–10, with 1 being the highest priority and 10 being the lowest. First-level call routing is accomplished using queue priorities.

Available with all feature packages.

2.2 Skills-Based Routing

Skillsets are established at both the Team/Department and agent level. Each skillset is assigned specific queues with customizable priority. Agents are then assigned skillsets to ensure they only receive calls they are capable of handling.

Available with all feature packages.

2.3 Time of Day / Day of Week Routing

Calls can be automatically routed depending on the time of day, day of the week, or for predefined holidays.

Available with all feature packages.

2.3.1 After Hours / Holiday Routing

After-hours routing provides specific routing options for your contact center during off-hours, weekends, and holidays. By using the Working Hours feature, new calls can be prevented from entering queues during designated time periods. This allows agents to continue processing calls currently in a queue without accepting new ones.

Available with all feature packages.

2.4 Call Delivery Weighted Call Distribution

Supervisors can configure and manage specific routing options based on queue priority and team or agent skillset.

Available with all feature packages.

2.5 Forced Forwarding

By enabling the forced forwarding option in the Admin/Supervisor portal, calls can be routed to alternate locations on demand.

Available with all feature packages.

2.6 Overflow Calls

Calls routed to a queue at maximum capacity can be forwarded to a secondary queue. This also applies to calls that enter the queue and reach predefined maximum holding times.

Available with all feature packages.

2.6.1 Overflow Number

The phone number to which overflowing calls from the primary queue are routed.

2.6.2 Overflow Secondary

Allows a secondary option to route calls that have overflowed to a full queue or have entered the overflow queue and have reached the maximum queue time.

2.7 Identity Routing

2.7.1 CRM-Based Routing
With the Contact Center, you can integrate the IVR into your back-office customer relationship manager (CRM) or ticketing systems. Call routing can then be determined based on data from your CRM.

Example: After calling in, a customer is prompted to enter an order number for an existing purchase. The Contact Center queries the CRM to determine which agent last spoke with the customer. The call can then be routed to the agent that last spoke with the customer.

Available with Gold and Platinum feature packages.

2.7.2 Routing by Dialed Number Identification Service (DNIS)
Calls can be routed directly to a queue based on the specific number dialed and bypass the need for an IVR selection.

Available with all feature packages.

2.7.3 Geography-Based Routing
Calls can be automatically routed based on the originating calling area. geographic origination. This is accomplished using the numbering plan area (NPA) or NPA/NXX for the inbound call.

Available with all feature packages.

2.8 Re-Queue Unanswered Calls
If an agent doesn't answer a call within a defined period, the Contact Center can pull the call back into the queue. Re-queued calls are placed at the head of the queue and delivered to the next available agent with the proper skillset.

Available with all feature packages.

2.9 Stranded Call Routing
Provides routing options in cases where all agents log out while there are still calls in queue. Available with all feature packages.

2.10 Zero Out of Queue Routing
Callers can exit their place in a queue by pressing zero. These callers are then routed to a preconfigured destination.

3 Queuing Features

The Conterra Contact Center provides a comprehensive set of routing functions to meet all of your contact center needs.

3.1 Inbound Voice Queues

Incoming voice calls can be prioritized and queued to be delivered to teams or agents based on their skillset.

Available with all feature packages.

3.2 Automated Queuing of Abandoned Calls

Abandoned calls keep their place in queue and automatically generate outbound callbacks once an agent is available. The contact number of the inbound caller is needed to enable the callback feature.

Available with the Platinum feature package.

3.3 Queued / Automated Outbound Calls

Multiple queues can be managed for outbound dialing. These outbound queues are configured via uploaded customer lists. When generating outbound calls, the Contact Center always contacts an agent first to ensure that there is a live person on the call when your customer answers.

Outbound queuing, or scheduled dialouts, provides a rich set of customizable functions for each outbound call in the list, including:

- Designation of outbound call starts and expiration dates
- Configurable outbound caller IDs (can be identified by team, individual agent, or specific calls)
- Call prioritization
- Ability to deliver calls at specified times of the day
- Selection of the maximum number of outbound attempts the system can make to contact a single customer and the amount of required time (set via timer) between each attempt.

Available with the Gold and Platinum feature packages.

3.4 In Queue Voicemail-to-Email Routing

The Contact Center will supply an automated option for the caller to exit the queue and leave a voicemail for the agent. The voicemail is then sent as a WAV attachment to a designated email queue and delivered to an agent with the proper skillset. If email queues are not used, the Contact Center can also send these messages directly to any email address.

Available with Gold and Platinum feature packages.

3.5 Email Routing by Keyword

Supports the ability to create multiple email routing rules based on keywords within the subject line or within the body of the email message. These rules help ensure the most qualified agent receives the email.

Available with the Platinum feature package.

3.6 Email Routing by Email Address

Customers can submit inquiries to specific email addresses designated in the Contact Center. Depending on the setup, these emails will then flow into separate queues assigned to specific teams. This ensures better initial routing of customer emails to the best department or agent that can answer them.

Available with the Platinum feature package.

3.6.1 Suspended Email Queue

Agents can place emails they plan to answer later into a personal suspended email queue. Contact Center then allows agents to re-visit emails within this queue whenever they're ready.

3.7 Website Chat Queuing

The Contact Center supports the ability to embed a click-to-chat functionality on your website, allowing customers to quickly contact sales and support agents via online chat sessions.

Available with the Platinum feature package.

3.8 Social Media Queuing (Twitter/Facebook)

Customer posts on company social media pages will be dropped in a designated queue. Agents can then respond to each inquiry directly from the Contact Center's queue. Available with the Platinum feature package.

3.9 Blended Multimedia Queues

Through the Contact Center, agents can be assigned a mix of inbound, outbound, email, chat, and social media messages. Designated agents can be assigned different messages based on their individual skillsets and the priority statuses of the inquiries. For example, inbound calls for one agent can be prioritized over messages from other support channels. If there are no inbound calls, the system can automatically generate outbound calls as the second prioritized activity for that agent.

Available with the Platinum feature package.

4 IVR Integration

The Conterra Contact Center includes a powerful and flexible Interactive Voice Response (IVR) solution that provides rich routing functions as well as integration with back-office systems, including customer self-service options like online bill pay and purchasing.

NOTE: IVR and self-service integration of back-office or third-party applications (standard web service-based ones only) is included with the Platinum feature package. Optionally, this function can be added to the Gold feature package for an additional fee.

4.1 IVR with Third-Party Data Dips (Read/Write)

The IVR solution supports integration with web services that enable back-office or third-party applications and processes. This includes the functionality required to query, read, or write data to the back-office or third-party application.

NOTE: IVR and self-service integration of back-office or third-party applications (standard web service-based ones only) is included with the Platinum feature package. Optionally, this function can be added to the Gold feature package for an additional fee.

4.2 IVR Development via Graphical User Interface (GUI)

All IVR call trees and routing functions are configured as part of the standard feature package. For customers that develop and manage their own IVR integrations, a GUI-based IVR configuration tool can be provided.

Available with all feature packages.

5 Contact Center Group Features

The Conterra Contact Center offers an array of industry-leading features. This section highlights some of Contact Center's most in-demand capabilities and should not be read as an exhaustive list of full functionalities.

5.1 Service Levels and Thresholds

Service levels and thresholds help agents answer calls as efficiently as possible. During initial implementation, you can configure service levels in Contact Center based on a variety of different elements, including:

- The number of calls received
- The number of calls answered
- The number of abandoned calls
- The amount of time callers spend waiting in queues

Real-time thresholds reporting can be viewed on the supervisor monitoring screen.
Available with all feature packages.

5.2 Configurable Alerts for Supervisors

Each queue can be configured with alerts which can notify supervisors or managers if an alert threshold is crossed.

Available with all feature packages.

5.3 Flexible Work Locations for Agents

Agents can use virtually any telephony device to handle inbound or outbound voice calls. This can include hosted SIP phones, softphones, third-party PBXs, PBXs with SIP trunks, analog phones / home phones, and mobile phones.

Available with all feature packages.

5.3.1 Whitelist Agent Login

If agents must use designated office phones to take calls, Contact Center can generate whitelists that enable agents to log in only with approved numbers.

5.4 Mobile / Telagents

Agents can receive queued calls without being logged into Contact Center. If any agents are suddenly experiencing issues accessing the internet or their Contact Center Application (CCA) client, the supervisor can quickly switch them to stand-alone Telagent mode. When internet access has been restored, agents can sign into the CCA to resume normal operations.

Available with Gold and Platinum feature packages.

5.5 Role Based & Granular Access Levels

Each user can be assigned a specific role in Contact Center. These designations restrict their acess to certain functionalities within the system. Administrators can also override access levels for any user at any point.

Available with all feature packages.

5.6 Grouping by Departments and Teams

Supervisors can group agents and managers into specific teams or departments.

5.7 Agent Logged in to Multiple Queues

Agents can be logged in to and active in an unlimited number of queues simultaneously. Available with Silver, Gold, and Platinum feature packages.

5.8 Visual Availability Statuses for Agents

Agents can set their own availability status, which appears to other agents and supervisors in real time.

Available with Silver, Gold, and Platinum feature packages.

5.9 Agent Wrap-Up Period

The Contact Center can automatically place agents into specified wrap-up times after each call, email, or chat session. This feature provides built-in time for agents to complete any post-communication work before taking their next customer interaction.

Available with Gold, and Platinum feature packages.

5.10 Agent Wrap-Up Timer

The wrap-up timer automatically places agents back into a status of "available" after its allocated time has elapsed.

Available with Gold, and Platinum feature packages.

5.11 Automatic Removal of Agents from Queue due to Unanswered Calls

If agents don't answer a call, their status is automatically updated to "unavailable."

Available with Gold, and Platinum feature packages.

5.12 Configurable Zero-Out Key

Allows for a configurable key to exit the queue.

Available with Gold, and Platinum feature packages.

5.13 Agent Time Tracking by Status and Activity Codes

Supervisors can create customized statuses and activity codes for agents to track the time they spend on a variety of work tasks. Unique to the Conterra Contact Center, this capability allows agents to track time while simultaneously receiving incoming calls and messages.

Activity codes can be used for "unavailable" statuses to denote whether agents are at lunch or in a meeting. They also can be added for special projects or any other work-time activity that needs to be tracked.

Available with Gold, and Platinum feature packages.

5.14 Multi-Level Classification / Disposition Codes

Supervisors can configure multi-tiered disposition codes that agents use to identify the type of customer communication, the purpose of the contact, and how the agent handled the message. An example call using disposition codes could look something like the following:

- Client Type = Existing Customer
    - Claim Number = AB9876
    - Account Number = 123456789A
    - Provider Number = abc1234
- Subject 1 = Billing Call
- Subject 2 = Triple Play Service
- Subject 3 = Past Due Bill
- Resolution = Paid Balance

Disposition codes can be viewed on historical reports and in real-time. They also can be used to categorize call recordings, which makes searching for communications with specific disposition codes attached easier.

Available with Silver, Gold, and Platinum feature packages.

5.15 Max Agents in Queue

Queues can be configured to allow only a pre-determined maximum number of agents to be logged in at any given time.

5.16 Max Calls in Queue

Queues can be configured to allow only a maximum number of calls at any given time. After the maximum number of callers is reached, new incoming calls can be routed to another queue or voicemail.

5.17 Max Time in Queue

A predetermined in-queue time can be set for incoming calls. If a call has reached the maximum amount of wait time, it can be forwarded to another queue or voicemail.

5.18 Multiple DIDs Per Queue

Contact Center can support multiple inbound calls at a time that terminate at the same IVR or queue.

5.19 Multiple Language Support

The Contact Center user interface (UI) supports multiple languages, including English, French Canadian, and Spanish.

5.20 Agent Scripting

Contact Center supports the creation of rich multi-tiered scripts and workflows for agents to use on calls. Agents can receive prompts while speaking with a customer and receive step-by-step guidance when selling or offering product support. Agent scripting also ensures that communications with customers are streamlined and consistent with company policies and best practices.

Available with Gold and Platinum feature packages.

5.21 Bulletins

Contact Center administrators can record preconfigured messages (called bulletins) that automatically play to incoming callers before they enter an IVR session or queue. After the bulletin plays, you can allow the caller to continue through the call flows, redirect to voicemail, or disconnect the call.

Available with Silver, Gold, and Platinum feature packages.

5.22 Business Continuity Capability

If agents are unable to work at their primary call center location due to power failures or natural disasters, Contact Center's business continuity capability allows them to log in into their CCA client using a personal computer and mobile/home phone. If internet access is unavailable, supervisors can manually switch individual agents to Telagents, which lets them receive calls on a personal phone device without the CCA client.

5.23 Phonebook / Directory

Agents can access a pre-populated phonebook for placing outbound calls. The directory also shows a real-time view of all logged-in agents and their statuses.

Available with Silver, Gold, and Platinum feature packages.

5.24 Executive Dashboard Display

The executive dashboard shows high-level visualizations of Contact Center activity, including call volume, level of service, agent statuses, call classifications, and call distributions. It also offers a breakdown of key metrics like answer rate, average wait times, and maximum wait times.

Available with all feature packages.

5.25 Canned IM Messages

Create canned IM messages, so agents overseeing chat queues can save time on typing and respond to customers with an array of preconfigured text responses.

Available with the Platinum feature package.

5.26 Third-Party URL-Based Queries

Third-party systems like Salesforce.com or Sugar CRM can receive a URL-based query from Contact Center that is routed through agents' default browser. For all incoming calls, a calling name or number is automatically sent via URL to connected CRM systems. For this functionality to work, third-party platforms must allow for URL-based queries.

Available with Gold and Platinum feature packages.

5.27 SWAT Service

With SWAT service enabled, Contact Center can automatically send outbound calls with a pre-recorded message to specified customer lists.

Available with the Platinum feature package.

5.28 Post-Call Surveys

Supervisors can create and manage post-call customer surveys to gather customer feedback and satisfaction ratings. Agents can manually transfer customer calls to the survey or customers will receive a prompt at the end of their support call to participate in the survey.

Available with the Platinum feature package.

5.29 View Calls Taken on Agent Private Lines

Contact Center offers an optional monitoring system for agents' Conterra-powered PBX direct inward dialing (DID) line. This way, if agents receive non-queued calls directly to their Conterra phone DID, Contact Center will still have visibility into the call.

Available with Gold, and Platinum feature packages.

5.30 Online Documentation and Training Materials

Supervisors and administrators can access a rich repository of user documentation on the Contact Center administrators training page. Available materials include CCA installation instructions, user guides, quick-reference guides, administrator-specific guides, and agent training videos.

Available with Gold, and Platinum feature packages.

5.31 Contact System Support via Email

Supervisors can get in touch with Contact Center support lines via the "Click to Email Support" button on the administrators support page.

NOTE: Service providers and customers can configure the destination points for support emails.

5.32 Contact System Support via IM / Chat

Supervisors can use the "Click to Instant Message/Chat Support" button on the administrators support page to get in touch with Contact Center support.

NOTE: Destination for this support chat feature is configurable per service provider or customer.

6 Dynamic Notifications

Conterra Contact Center Dynamic Notification feature allows agents to send outbound voice, SMS, or email notifications to contact your customers using their preferred method of communication — or the most appropriate one. Use cases for this feature are varied and include (but aren't limited to) revenue generation tasks, operational efficiency needs, scheduling, customer care, and surveys.

Although previously available, the updated dynamic notification functionality has been adopted for scheduling within many different industries, particularly healthcare. Its broad application makes dynamic notifications one of the more versatile and in-demand features of Contact Center.

6.1 Feature Summary

- Capable with voice, SMS, and email messages
- Fully customizable and easy to use
- Buildable library of messaging templates for agents
- Highly scalable
- Tightly integrated with other Contact Center features
- Live dashboard reporting on status of outbound campaigns
- Ability to export reporting on completed campaigns
- Text-to-speech voice notifications in 6 voices, including English, French, and Spanish options

6.2 Tremendous vertical opportunities for:

- Healthcare (for appointment reminders)
- Retail / B2C (for deliveries, surveys, promotions, and collections)
- Real Estate (for open houses and visit scheduling)
- Travel / Hospitality (for travel date reminders, making reservations, and placing orders)
- Services (for installation and outage notifications)
- Banking (for account balance updates and payments)
- Utilities (for robocalls, outage updates, and collections)
- Education (for general notices, additional information, weather alerts, and emergency updates)
- Small and Medium Sized Businesses (for promotions, upselling, and marketing)
- Transportation (for pick-up reminders and scheduling)

7 Supervisor Features

The Conterra Contact Center provides a comprehensive set of features that help supervisors monitor and manage system activity.

Unless otherwise specified, supervisor features are available in Silver, Gold, and Platinum feature packages.

7.1 Create, Modify, and Remove Agents

Supervisors can create, modify, and remove agent profiles within Contact Center.

7.2 Supervisor Dashboard

Supervisors can view a powerful web-based reporting dashboard that shows real-time and historical views of key metrics.

7.2.1 Real-Time Statistics

Supervisors can use their dashboard to view real-time queue and agent activity. This capability allows supervisors to easily see when pre-configured thresholds have been hit.

7.2.2 Daily Global Statistics

The Contact Center dashboard shows a global daily view of key metrics for all queues, including calls received, calls queued, abandoned calls, levels of service, wait times, talk times, and call backs.

7.2.3 Daily IVR Statistics

The Contact Center dashboard provides a daily view of all calls by IVR option, including calls received, calls queued, abandoned calls, levels of service, wait times, talk times, and callbacks.

7.2.4 Daily Queue Statistics

The Contact Center dashboard provides a daily view of all calls by queue, including calls received, calls queued, abandoned calls, levels of service, wait times, talk times, and call backs.

7.2.5 Current Queue Status

The Contact Center dashboard offers real-time views of each queue, including the number of calls, number of agents currently logged in, average wait times, and callbacks.

7.2.6 Current Agent Status

The Contact Center dashboard provides a real-time view of agent activity across all assigned queues, including current statuses, time spent in statuses, incoming calls, outgoing calls, chats, and time management.

7.2.7 View Agents in Multiple Queues Simultaneously

Supervisors can view agent activity in real-time across all queues.

7.3 Real-Time In-Queue Call Management

7.3.1 Real-Time Updating of In-Queue Calls

Supervisors can see all calls currently in a queue. They can also change call priority and reassign calls to other queues in real-time.

7.3.2 In-Queue Caller ID/Name Display Visibility

If available, supervisors can view calling numbers and calling names of all calls in queue.

7.3.3 Manage Callbacks

Supervisors can see all scheduled call backs, including the number of attempts the system has made to contact the caller. Contact Center allows supervisors to make real-time priority modifications and manually retry calling customers already within the callback queue.

Available with Gold and Platinum feature packages.

7.4 Email Management

Supervisors can track and manage their email queues within Contact Center. Supervisor features are available in the Platinum feature package.

7.4.1 Email Keyword Routing Configuration

Supervisors may create or manage email templates based on keywords within the subject line or body of the email message.

7.4.2 Email Tracking

Supervisors can track email communications from initial receipt to close out. This functionality also offers visibility into agent/customer emails and agent response times.

7.4.3 Manage Suspended Email Queues

Supervisors can view the number of suspended email messages per agent, including the dates of initial receipt and the length of time they have been suspended. Supervisors can also change the priority of suspended emails, assign them to new agents, or place them into other queues.

7.5 Supervisor Call Monitoring, Whispering, and Barge-In

Supervisors can silently monitor agents, speak (whisper) to agents without callers hearing, and step into conversations (barging in) between agents and callers. Monitoring sessions can be established from any location and are started once supervisors enter a phone number at the system prompt.

Available with Gold, and Platinum feature packages.

8 Recordings

Conterra Contact Center records all inbound calls, outbound calls, emails, and chat sessions.

8.1 Call Recording

For Gold and Platinum feature packages, unlimited call recording is provided for all inbound and outbound calls. By default, call recordings are saved for 30 days, but there are several options available for longer-term call storage.

Available with Gold and Platinum feature packages.

8.1.1 Extended Storage Times

For an additional fee per concurrent agent license, recorded calls can be stored for up to 365 days.

8.1.2 Secure Download of Call Recordings

Secure FTP access allows for calls to be downloaded onto external disc storage systems. Once downloaded, the Contact Center no longer offers a view of the call recording from the supervisor dashboard. Call recordings are downloaded with a clear naming system that makes searching for specific calls easier.

8.1.3 Bring Your Own Call Recording Storage

Contact Center offers the option to store call recordings on third-party Amazon S3 or Microsoft Azure cloud-based storage systems. Both third-party systems must be managed by the user. However, Contact Center will write call recording to S3 or Azure automatically, which allows for indefinite storage while still maintaining the benefits of Contact Center's administrative tools for searching and reviewing recordings.

8.2 Email Logs

Contact Center offers views into all inbound email messages within specific queues. Stored emails can be searched by date, team, agent, "from" field, "to" field, subject line, and multi-level disposition codes.

Available with the Platinum feature package.

8.3 Web Chat Logs

Contact Center stores all inbound web chat sessions with customers. Stored chat logs can be searched by date, team, agent, "from" line, "to" line, subject line, and multi-level disposition codes. Available with the Platinum feature package.

8.4 Agent Chat Logs

Contact Center stores all chats between agents on the platform. Supervisors can search and review stored chat logs.

Available with Gold, and Platinum feature packages.

9 Agent Features

The Conterra Contact Center provides a comprehensive set of features that allow agents to monitor and handle calls within their assigned queues

9.1 CCA Agent Dashboard

The CCA Agent Dashboard provides agents with a powerful and easy-to-use hub for all their Contact Center tasks. This dashboard can be accessed on both a desktop and through the browser application.

Available with Silver, Gold, and Platinum feature packages.

9.1.1 Ergonomic Design

The CCA client is designed to be an ergonomic business tool that reduces injuries caused by repetitive strain. It accomplishes this with minimum keystroke commands and the option to click through on each function.

9.1.2 Customizable Agent Dashboard

The CCA client supports customization by agents for a more comfortable working experience. Customizable items include (but are not limited to) fonts, colors, hot keys, and speed dial numbers.

9.1.3 Configurable Hot Keys

The CCA client supports the use of keyboard hot keys to perform commonly used agent functions. This reduces the need for agents to move back and forth between their keyboard and mouse.

Hot keys include:
- Change activity to Available
- Change activity to On Break
- Initiate an internal chat
- Dial out
- Show phone book
- Enter classification information
- Transfer call

9.1.4 Agent Login Passcode

Agents must log into the CCA client before receiving calls from the queue. Passcodes can be reset by either the agent or their supervisor.

9.1.5 Integrated Agent View of Queues

Agents can see the status of all their assigned queues from the CCA client. They can also view a variety of metrics, including the number of calls in queue, wait times, amount of logged in agents, and number of available agents.

9.1.6 Agent Status and Activity Codes

Agents can select preconfigured activity codes to indicate availability and track time spent on special projects or activities for which the organization requires time tracking. Activity codes can include designations for when agents are unavailable to take calls, including "At Lunch" or "In a Meeting" statuses.

9.1.7 Call History

The CCA client allows agents to view a log of all their inbound and outbound calls, including dialed, received, and missed.

9.1.8 Personal Agent Statistics View

The CCA client allows agents to view their daily performance data.

9.1.9 Inter-Agent Status View

Agents can view the status of other agents within the CCA client. This helps agents know who can receive transfers or conference calls.

9.1.10 Inter-Agent Chat

Agents can chat with each other or enter group chat sessions within the CCA client.

9.1.11 Incoming Call Screen Pop

Agents receiving inbound calls will receive a screen pop with the caller's name and phone number. This view also allows agents to view the call's queue of origin.

9.1.12 Screen Pop for Integrated CRMs

An optional feature lets agents receive screen pop-ups within an integrated CRM tool for inbound calls (browser view only).

9.1.13 Suspending Emails for Agents

Agents can choose to suspend emails and reply to them later by placing them in a separate queue. When the agent is ready to respond, they can simply select the email from their suspended email queue.

Available with the Platinum feature package.

9.1.14 Workflow Scripts for Agents

Agents have access to the Contact Center agent scripting tool. This preconfigured workflow tool prompts agents with questions to ask a caller and, based on their responses, walks the agent through the process to sell or support complex products or services. Agents can also use the tool to notify supervisors when a step in the workflow is unclear or incorrect.

Available with the Platinum feature package.

9.1.15 Flagging Calls

If call dispositions are enabled, agents can flag calls for supervisor review. Agents can select a preconfigured reason for flagging the call. Available flagging reasons are managed by supervisors.

9.1.16 Outbound Caller ID Selection

Agents can select from different preconfigured caller IDs when making outbound calls.

9.2 CCA Agent Calling Features

The CCA client is available both as a lightweight desktop application and as a web browser portal.

NOTE: Currently, the browser version of CCA does not support 100% of the functionality available in the desktop client.

9.2.1 Outbound Calling

The CCA client provides agents with a flexible interface for generating outbound calls. Agents may enter a number to be dialed, select from a list of previously dialed numbers, or use the phone book to place an outbound call.

9.2.2 Transferring Calls

Agents can transfer calls by entering specific phone numbers or using the phonebook to select from a list of agents currently logged in. Transferring agents can also view the status of each agent logged into CCA.

9.2.3 Conference Calling

Agents can create conference calls by directly entering the phone numbers of participants, using the phonebook, or selecting from a list of logged-in and active status agents (the scheduling agent can view the status of all other logged-in agents).

9.2.4 Call Hold

Agents can use the CCA Client to place active callers on hold. Callers will hear music while waiting for the agent to return.

9.2.5 Muting Calls

The CCA Client allows the agent to mute an active call.

9.2.6 Classifying Calls

Agents can classify contacts via predefined classification/disposition codes. Agents can select codes while actively speaking with the customer or directly after the communication ends. If selecting a classification is mandatory, agents must select an option before receiving new calls.

10 IVR & In-Queue Announcements

The Conterra Contact Center can send audio announcements to waiting callers. These announcements can include both standard operational messaging (i.e. "call times might be longer due to high demand") and sales/marketing messaging. All announcement prompts are managed by Contact Center administrators or supervisors.

Available with Silver, Gold, and Platinum feature packages.

10.1 Bulletins

Allows preconfigured messages (Bulletins) to be recorded and activated on demand by Contact Center administrator or supervisor. These Bulletins can be played to callers either before they enter the IVR session or before they enter a queue. Once the bulletin plays, the caller you can allow the caller to continue through the call flows, force them to voicemail or disconnect the call.

10.2 Entrance Announcements

Callers can hear an announcement before being forwarded to a queue.

10.3 Queue Position and Wait Time Announcements

Dynamic announcements can be configured to notify callers of their place in the queue and estimated wait time.

10.4 Periodic / Multiple Announcements

Contact Center can play multiple announcements to in-queue callers at preconfigured intervals.

10.5 Music on Hold

Contact Center can play music files to callers in queues or on hold.

10.6 Whisper Messages to Agents

Agent-specific announcements can be configured before an agent takes a call. This announcement plays only to the agent in question and can contain specific information about the upcoming call.

10.7 Dial-In Prompt Recording Studio

Contact Center administrators and supervisors can manage recordings and prompts via a dial-in prompt recording studio.

10.8 Uploading Announcements

Contact Center supervisors and administrators can upload custom prompts and announcements.

11 Workforce Scheduling

The ConterraContact Center lets supervisors manage agents via powerful and flexible workforce management tools (WFM).

Available with the Platinum feature package.

11.1 Forecasting

The WFM tool allows supervisors to forecast the number of active agents they might need at any given time. These forecasts are calculated based on historical data and ensure that call center teams are never under or overstaffed.

11.2 Automated Scheduling

With WFM, supervisors can configure a set of shift rotations that will automatically carry forward until edited again. Vacation time and shift trades are reflected in real-time on the schedule.

11.3 Schedule Optimization

Supervisors can use WFM to model "what if" scenarios that determine future scheduling requirements based on projected changes in call volumes.

11.4 Adherence (Real-Time & Reporting)

Supervisors can see all their assigned agents on a single screen. They can also review which agents are in compliance, slightly out of compliance, or severely out of compliance with their set schedules.

11.5 Vacation Automation

Vacation automation ensures that agents do not schedule conflicting vacation dates so that call centers are always staffed appropriately.

11.6 Agent Shift-Trade Marketplace

WFMs allow agents to complete shift trades within a virtual marketplace. Agents can post shifts they want to trade and accept ones they want to work. The marketplace ensures that only qualified agents are accepting requisite shifts by flagging the trade for supervisor approval. An optional alternative can be enabled that lets WFM automatically evaluate and approve shift trades.

12 Agent Evaluation

The Conterra Contact Center provides an evaluator tool that rates voice and chat interactions between agents and customers. With this tool, supervisors can ensure that customer interactions are being conducted in accordance with company standards.

Available with the Platinum feature package.

12.1 Evaluation Templates

Supervisors can quickly create evaluation templates and questionnaires within Contact Center to review agent-customer interactions.

12.2 Evaluation Acknowledgement by Agents

After completing evaluations, supervisors can opt to send results to the agent in question. Agents are then asked to select the "Acknowledge" button for confirmation that they received and viewed the evaluation.

13 Contact Center Reports

The Conterra Contact Center provides hundreds of standard reports that offer overviews of system activity.

Available with Gold, and Platinum feature packages.

13.1 Standard Reports

REPORT NAME	DESCRIPTION
Flash Report	Overview of all call center activities
IVR Overall (with split)	Summary of IVR activity for specified time periods.
Call Distribution	An hour-by-hour summary of call statistics by queue for specified time periods.
Call Management Analysis	A breakdown of threshold adherence by queue. It shows the number of unique calls queued.
Calls Origination	Summary of the calls by region for each IVR within a specified time period.
Hourly Statistics	Number of calls queued, answered, not answered, and sent to voicemails for every hour of the day. It also shows the average talk and wrap-up time for each corresponding hour.
IVR Checkpoints	Number of calls that reached a pre-determined IVR function within a specified time frame.
IVR Checkpoints with Sum	A summarized report of the number of calls that reached pre-determined IVR functions within a specified time period.
After Hours Calls	Detail of calls received outside of regular office hours within a specific timeframe.
Dial Out Attempts	List of all attempts to dial out.
Dial Out Calls	List of all dial outs regardless of whether they are scheduled or not.
Unanswered Calls	List of calls that were queued once and never answered by either a live agent or voicemail.
Voicemail Analysis	Number of voicemails received per queue within a specified time period.
Post-Call Survey	A tabular report that must be exported to XLS. Columns represent survey questions, rows represent survey participants, and each cell represents the numerical response provided by the participant.
Abandoned Calls	List of all abandoned calls, including the date and time, automatic number identifier (ANI), and wait time of each before abandonment.

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Active Emails	List of emails that are currently waiting in queue.
Call Distribution (with Chats and Mail)	Total answered and abandoned calls by queue for each hour of the day.
Complete Call and Email Detail Records	Combines all calls and emails into a call detail record (CDR), which displays the source, destination, time in, and time out of each queued customer communication (as well as non-queued calls and emails).
Complete Email Detail Records	Shows all emails in a CDR-style layout and displays the source, destination, time in, and time out of each queued email (as well as non-queued emails).
Daily Peak Call Volume	Graphical representation of the call peak per day across a user-defined number of days.
Do Not Call List	List of telephone numbers that should not be dialed.
IVR Overall	Summary of all calls received into an IVR during business hours and after hours (includes details on the queue-level).
IVR Overall Report by Region	Summary of all calls received into an IVR both during business hours and after hours for a user-defined region (includes details on the queue level).
List of Hosted DIDs	Shows DIDs ported to the platform for enhanced stats and call recording. It is typically used in conjunction with the Insight service.
Service Level	List of total number of calls answered or abandoned within and outside of the designated acceptable waiting time.
Voicemail Analysis with Details	Details of the queuing time and wait time of all calls that went to voicemail.
Volume of Calls	List of total calls queued, answered, and abandoned by month for any given year. Includes month-over-month bar graph comparisons showing queue breakdowns.
SWAT — Confirmation	List of all calls delivered.
SWAT — Users Per Group	Shows the users for each SWAT group.

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13.3 Queue Reports

REPORT NAME	DESCRIPTION
Queue Productivity by 30 Minute Intervals	Shows queue activity in 30-minute intervals for specified time frames.
Queue Productivity by 30 Minutes, with Chat and Emails	Shows queue activity in 30-minute intervals for a specified time period. Also includes voice calls, queued web chats, and queued emails.
Daily Queue Productivity	Shows daily statistics of queue activity for a user-specified time period.
Weekly Queue Productivity	Shows daily statistics of queue activity grouped by week for a user-specified time period.
Monthly Queue Productivity	Shows monthly statistics of queue activity grouped by month for a user-specified time period
Yearly Queue Productivity	Shows statistics of queue activity grouped by calendar year for a user-specified time period.
Queued Calls Distribution	A chart displaying the number of calls per hour in each queue.
Outbound Queuing	List of total outbound calls made via the scheduled dial-out feature.
Individual Callback Stats	Shows details of callbacks, including the queuing date and time and the callback attempt/completion date and time.
Calls Dequeued	List of total calls that were dequeued and their reasons for dequeuing.
Daily Queue Productivity with Chats and Emails	Shows daily statistics of queue activity for a user-specified time period, including chat and email queues.
Daily Queue Summary	Similar to the Monthly Queue Summary report but separated by day.
General Queue Stats	Shows average speed to answer and agent talk time by day.
Missed Callbacks	Shows detail of callbacks that were not completed.
Monthly Queue Productivity with Chat and Emails	Shows activity grouped by month for a user-specified time frame. Includes voice calls, web chats, and queued emails.
Monthly Queue Summary	Shows monthly statistics of queue activity for a user-specified time period, including agent talk time statistics.
Queue Callback Stats	Shows the totals of all callback statistics.
Weekly Queue Productivity (with Chats and Emails)	Shows weekly statistics of queue activity for a user-specified time period, including chat and email queues.
Yearly Queue Productivity (with Chats and Emails)	Shows yearly statistics of queue activity for a user-specified time period, including chat and email queues.

13.2 Agent Reports

REPORT NAME	DESCRIPTION
Agent Activity by 30-Minute Intervals	Shows specific agent activity in 30-minute intervals.
Daily Agent Activity	Shows specific agent activity per day.
Weekly Agent Activity	Shows specific agent activity by week.
Monthly Agent Activity	Shows specific agent activity grouped by month.
Yearly Agent Activity	Shows specific agent activity grouped by year.
Agent Performance	Shows key agent-performance metrics within a user-specified time period.
Agent Utilization	Shows agent activities while logged in for a specified time frame.
Agent Utilization Total Average	Shows the average time agents spent in available statuses.
Agent Status Trace	Shows the logged activities of individual agents for specified time periods.
Agent Login/Logout Time	Shows a list of all login and logout times per agent session.
Agent Login/Logout Time (with Computer Name)	Shows a list of all login and logout times per agent session and identifies the name of the computer used to log into the CCA.
Agent Performance (with Emails)	Shows key agent-performance metrics within a user-specified time period, including emails.
Agent Permissions	Shows a list of current agent security details, including role, feature access, and queue access.
Concurrent Sessions by Team	Shows list of total logins in 30-minute increments per team.
Daily Agent Activity (Agent Full Name)	Shows specific agent activity per day with the agent's full name.
Daily Agent Activity (with Chats and Emails)	Shows specific agent activity per day, including chat and email queues.
Daily Agent Activity (with Missed Calls)	Shows daily agent activity, including missed calls.
List of Agents	Shows list of active agents.
Monthly Agent Activity (with Chats and Emails)	Shows specific agent activity by month, including chat and email queues.

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Weekly Agent Activity (with Chats and Emails)	Shows specific agent activity per week, including chat and email queues.
Yearly Agent Activity (with Chats and Emails)	Shows specific agent activity per year, including chat and email queues.
Agent Configuration	Shows detailed list of each agent's profile configuration, including username, threshold limits, permissions, and skillsets.
Agent Skillset	Shows definitions of all skillsets and agents. Also indicates team-based skillset assignments and special-agent settings.

13.4 Call Tracking Reports

REPORT NAME	DESCRIPTION
Call Tracking With Grouping	Shows detail of every call handled by IVR/DNIS for a user-specified time period, including call dispositions.
Call Tracking Without Grouping	Shows detail of every call handled for a user-specified time period without grouping.
Notes Tracking	Shows comprehensive list of all notes made by agents for a user-specified time period.
Subjects Tracking by Territory	A summary of call dispositions for a user-specified time-period.
Subjects Tracking Per DNIS	A summary of call dispositions by DNIS for a user-specified time-period.
Outbound Call Tracking	Shows a comprehensive list of outbound calls containing classification data.
Outbound Call Tracking with Notes	Shows comprehensive list of outbound calls with classification data, including agent-made notes.
Outbound Call Tracking Without Grouping	Shows comprehensive outbound call list with client type classification data.
Outbound Call Tracking (No Callbacks)	Shows detailed outbound call list with classification data, excluding callbacks.
Call Tracking with Grouping By Subject	Shows detailed outbound call list with classification data grouped by caller type and subject.
Notes Tracking with Subjects	Shows detailed inbound call list with agent notes.
Scheduled Outbound Call Tracking Without Grouping	Shows list of total scheduled outbound calls with caller type and subject.
Call Tracking (All Fields)	Comprehensive inbound call report with all classification fields.

Call Tracking Summary — Inbound/Outbound	List of total inbound and outbound calls sorted by classification data, including calls with no data.
Inbound Call Tracking Summary	List of total Inbound calls sorted by classification data.
Inbound-Outbound Call Tracking	List of total inbound and outbound calls sorted by classification data.
Inbound/Outbound Call Tracking with Grouping	List of total inbound and outbound calls sorted by caller type and subject.
Notes Tracking with Emails	Comprehensive list of inbound calls and emails with agent notes.
Outbound Call Tracking with Grouping	List of total outbound calls by caller type and subject.
Subject Tracking	List of total inbound calls sorted by subject and inbound path.

13.5 Billing Reports

REPORT NAME	DESCRIPTION
Complete Call Detail Records	Call-by-call details of all calls for a user-specified time period.
Daily Concurrent Sessions Peak	Shows maximum number of concurrent sessions.
Dial Out Billing	Shows outbound call details, including long-distance (LD) costs.
Inbound Billing	Inbound call details, including inbound toll-free number (TFN) costs.
Second Leg Billing	Shows charges related to calls made by agents from a queue.
Total Number of Calls Per DNIS	Shows a daily summary of all calls by DNIS for a user-specified time period.

13.6 Workforce Management Reports

REPORT NAME	DESCRIPTION
Agent Forecasting	Shows the number of agents that should be staffed on any given day for each one-hour interval.
Agent Schedule	Shows lists of agent schedules for one or multiple days, including lunch breaks and special events occurring during work shifts. The report shows agent name, team, event (if applicable), start and end time of shift, role description, and working location (if specified).

Event	Shows a list of all events scheduled within a specified time period. It includes the start and end time for each event, scheduled agents, and the total amount of worked minutes per event.
Queue Schedule	Shows which agents are scheduled by queue for a specified time period. It includes agent name, start and end time of shift or event, and total worktime minutes spent.
Vacation	Shows allotted vacation time per agent. Also shows a breakdown of vacation time used and remaining accruals.
Vacation Limits	Lists the maximum number of vacation hours that can be booked on any given day. It also shows the actual number of vacation hours booked per day.

13.7 Custom Reports Available

REPORT NAME	DESCRIPTION
Daily Queue Productivity by IVR	Shows daily statistics of queue activity sorted by IVR for a user-specified time period.
Queue Productivity in 30 min interval with AWT	Shows daily statistics of queue activity with adjustable abstract window toolkit (AWT) for a specified time period.
Weekly Agent Activity 2	Shows unanswered calls for agents on a weekly basis.
Calls during lunch hours	Shows calls made during lunch hours.
Short duration calls after transfer	Shows transferred calls with a short duration.
Activity Report (5 min base)	List of total calls handled within and after five minutes.
Afterhours Calls with DNIS name	Call details for after-hours calls, including DNIS.
Agent Activity — with Missed Calls	Shows total missed calls per agent within a designated reporting period.
Agent Performance with Time Tracking	Shows key agent-performance metrics within a user-specified time period, including totals per status.
Agent Session Termination	Shows information for calls terminated by the system.
Agent Utilization Average per Day	List of agent's average time spent in all statuses.
Call Tracking Report	Shows a customized call tracking report.

Call tracking with grouping with DNIS name	Shows details of every call handled by IVR/DNIS for a user-specified time period. Includes call dispositions and DNIS name.
Call Tracking without grouping with DNIS Name	Shows the detail of every call handled for a user-specified time period. Includes call dispositions and DNIS name.
Call Volume and Staffing (Chart)	Shows chart of calls queued and transferred. Also shows all agents' log-in times in 30-minute increments.
Click-to-dial Details	Shows click-to-dial totals with time information.
Complete Call Details	Shows CDRs with abandoned call marking.
Custom Call Distribution	Shows total calls answered and abandoned by queue in 1-hour intervals.
Custom Call Distribution 2	Shows total calls answered and abandoned by queue within adjustable intervals.
Custom Call Tracking	Shows comprehensive call details with classification and survey data.
Custom Call Volume Report	Shows a bar graph of total calls per hour with their duration.
Outgoing Calls	Shows outbound calls with talk-time statistics.
Queue Productivity Totals	Shows queue productivity totals, not divided by time frame.
Daily Agent Activity with percentages	Shows specific agent activity per day with the percentage of time spent in each status.
Daily Agent Productivity by Queue	Shows a list of agent call totals by queue.
Daily Agent Transfer	List of agent transfer totals, including direct inbound calls and outbound calls to third parties and queues.
Daily Agent Transfer by Queue	Shows agent transfer totals by queue. Does not include DID transfers.
Daily Call Tracking	Summary of call tracking categories by queue.
Daily Queue Report	Shows daily queue totals with service level percentages for 30, 60, and 130 seconds.
Daily Queue Report with callbacks	Shows daily queue totals with service level percentages for 30, 60, and 130 seconds, including callbacks.
Daily Queue Specific Agent Utilization	Shows call totals, including callbacks and transfers by agent, queue, and day.

DNIS Listing	List of active DNIS IVR.
First call resolution	Shows the number of calls transferred by agents for each call subject. Also shows the number of calls finished with the initial answering agent.
Full Call Details	Shows filtered calls by a second parameter within specified time frames.
Hourly Call Log	Shows call details by agent per hour.
Outbound calling call analysis	Shows total long-distance minutes by region.
Outbound Calls	Shows comprehensive outbound call list, including duration and connection result.
Queue Productivity with DNIS name	Shows productivity levels by queue with DNIS name. Not divided by time frame.
Queue Productivity with Handle Time	Shows daily statistics of queue activity for a user-specified time period, including chat and email queues and handle time.
	Shows totals by queue and hour intervals with abandoned times and handle times.
Queue Summary	Shows callback details, including queue and result.
Requested Callbacks Details	Shows totals calls made in preset talk time intervals: 0-3, 3-10, 10-30, 30+ (in minutes).
Talk Time Report	Shows summary of calls transferred to each DID.
	Shows details of calls transferred to a specific DID.
Total of calls transferred per DID	Shows comprehensive unanswered call list with DNIS name.
Transfers made to a specific DID	Shows daily queue statistics by team, including queue breakdown and subject-tracking totals.
Unanswered Calls with DNIS name	Shows custom report with call tracking information sorted by agent.

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