IntellaQueue

- Agent Editor
- Agent Assignments
- Agent Assignments Schedule
- Queue Leave Conditions
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  - Generate Reports (IntellaQueue)
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Agent Editor

Overview

The **Agent Editor** screen is for adding and managing login credentials for Agents. An Agent is a special account on the system specifically for IntellaQueue tracking and usage.

> Each Agent requires an available license in order to be created.

> Even though Agent logins are not bound to a particular device or extension, the device that they use must be set to allow agent logins for IntellaQueue, or they will be disallowed from doing so even with a proper agent license.

Adding a New Agent

1) Click the **New Agent** button and fill out the various fields for the Agent:

- Keep in mind Agent Num and (optional) Agent Pin are number-only fields
- The **Associated User** field will list all of the users available
  - Multiple Agents can be associated with the same user if that Agent has multiple phones
  - As part of the **[development road map: new Agent Device handling]** will take care of Agents that have multiple phones to no longer need multiple Agent logins.

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	Field	Type	Description
Required	First Name	Text	For new Agent
	Last Name	Text	For new Agent
	Agent Num	Numeric	Number that the Agent will be using to login
Optional	Pin	Numeric	Security pin for Agent login, recommended to prevent people logging in using the wrong agent number

	Field	Type	Description
	Associated User	List	The Agent's own web portal user account. This is used for reporting purposes and only if Agents are not hot-desking • All of the calls the extension has made/received while the Agent was not logged in will be known
View Only	Manager	Boolean	If Yes, then the **[Agent Toolbar]** has extended capabilities including: • Live call monitoring • Controlling Agent status • Setting **[Manager Only Statuses]** on Agents Use the **[License Manager]** to set which Agents have Manager status.

2) Next select an **Agent Num** and an **Agent Pin** (optional).

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3) Lastly, you can associate a user account with the Agent.

4) Click the **Save** button. After you click save, you will see a message stating **Changes Saved**.

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Deleting an Agent

1) Navigate to the **Agent Editor** screen via the **Navigation Panel**.

2) Find the Agent you wish to delete, highlight it by clicking on it, and then click the red **X** under the **Delete** column.

3) A confirmation pop-up will appear confirming your selection. Click **OK** to confirm. You will see a message stating **Changes Saved**.

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Agent Assignments

Overview

The **Agent Assignments** screen is dedicated to assigning Agents to specific Queues. There are two different modes to consider when using this screen. **Queue Select Mode** and **Agent Select Mode**, which you can access via a button at the top left hand of the **Agent Assignments** screen as pictured below.

In Agent Selection Mode:

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In Queue Selection Mode:

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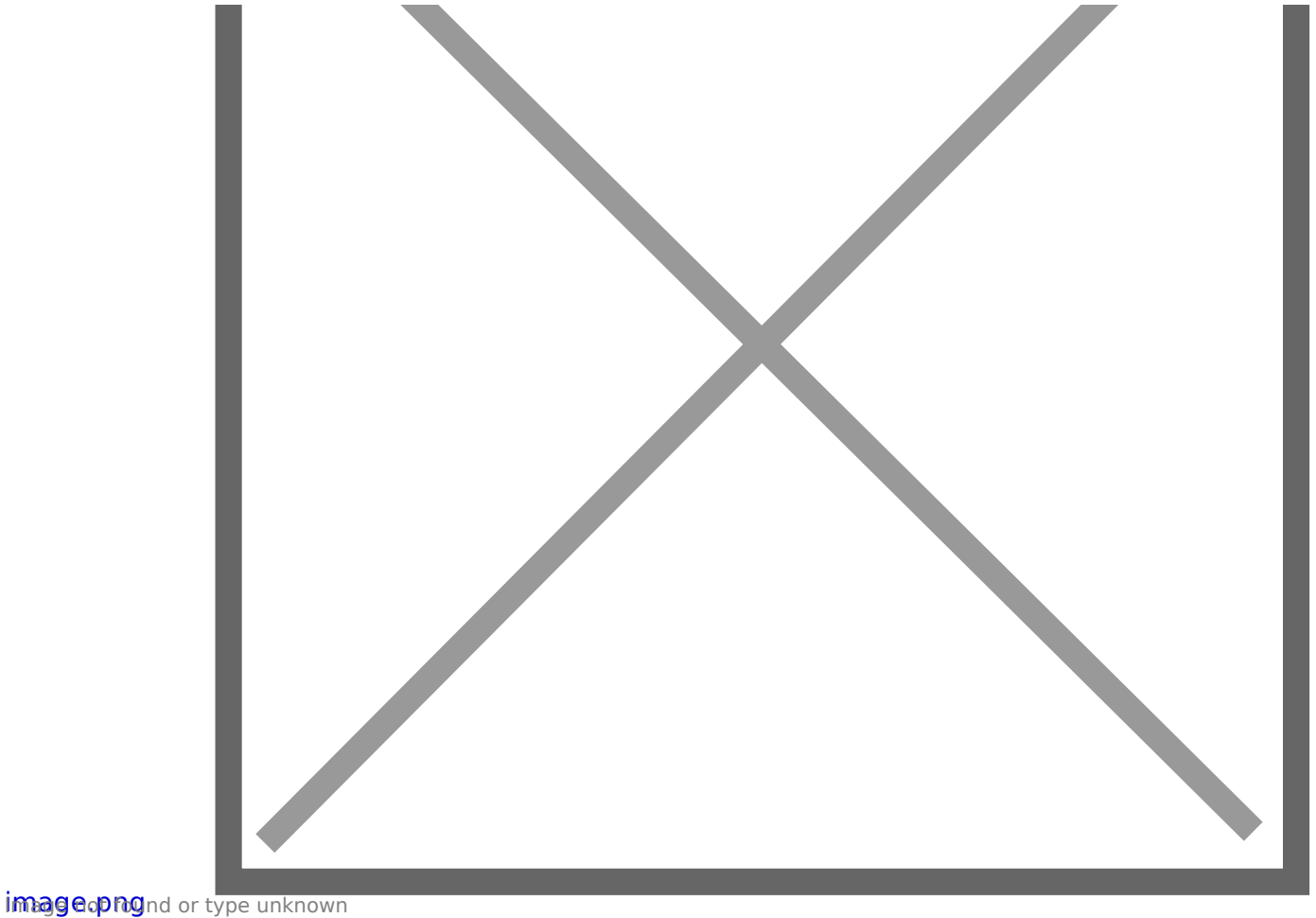image.png or type unknown

Regardless of which mode you are in, it is important to ensure that you have the correct Agent or Queue selected before making changes. This can be accessed from the drop-down at the top right-hand of the screen to the left on the mode selection button. In the example below, we are selecting a Queue to add Agents to while in **Queue Selection Mode.** It works vice versa if you are in **Agent Selection Mode** (you are selecting an Agent to add Queues to).

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Configuring Agents while in Queue Selection Mode

1) Start by navigating to the **Agent Assignments** screen via the **Navigation Panel.**

2) Then ensure you have selected the correct mode and the proper Queue from the drop-down.

3) To add Agents, click the green arrows under the **Include** column for each Agent you wish to add. As you include each Agent, they will be moved to the **Included Agents** panel.

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> If you need to add additional agents, you can click the **Create New Agent** button above the
> **Available Agents** panel. This will immediately take you to the **Agent Editor** screen.
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4) To remove Agents from a Queue click the green arrows under the **Exclude** column from the **Included Agents** panel for each Agent you wish to exclude.

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Configuring Agents while in Agent Selection Mode

1) Start by navigating to the **Agent Assignments** screen via the **Navigation Panel.**

2) Ensure you selected the correct **mode** and the proper Agent from the drop-down.

3) To add Queues to the agent, click the green arrows under the **Include** column for each Queue you wish to add (see the image below). As you include each Queue, they will be moved to the **Included Queues** panel.

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4) To exclude Queues from an Agent, click the green arrows under the **Exclude** column from the **Included Queue** panel for each Queue you wish to exclude.

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Agent Assignments Schedule

Overview

This screen is dedicated to assigning specific schedules to Agents, whether it be on a temporary or permanent basis.

Often this feature is used to assign Agents to specific Queues during times when other people who are normally staffed to that Queue are unavailable.

> Note: An Agent must log in before the schedule change becomes active.

- **Example 1**: The main sales team takes a lunch every day from 12:00-1:00 PM. An Agent (or multiple Agents) is assigned to this Queue to help with potential sales calls while the normally staffed Agents are out at lunch. This would be an example of a recurring semi-permanent schedule
- **Example 2**: On a particular day there is going to be a 2-hour meeting with the Installation team between 2:00-4:00 PM, so a temporary schedule is assigned to a specified number of Agents to field these calls during this meeting. When the meeting is over, the schedule will be deleted.

Adding an Agent Assignments Schedule

1) Navigate to the **Agent Assignments Schedule** screen from the **Navigation Panel.** Click the **New Agent Assignment Schedule.**

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	Name	Type	Description
Required	Agent Name	List	For preexisting Agent
	Queue Name	List	For Preexisting Queue
	Day	List	Day of Week

	Name	Type	Description
	Start Time	List	Start Time (24 hour clock)
	End	List	End Time (24 hour clock)
Optional	Overflow	List	Priority

2) Next choose an **Agent Name, Queue Name, Day, Start Time,** and **End Time** for the **Schedule. Overflow** is optional but is useful if you have multiple Queue assignments in place.

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3) Click the **Save New Agent Assignment Schedule** button. After you click save, you will see a message stating **Changes Saved**.

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Deleting an Agent Assignments Schedule

1) Navigate to the **Agent Assignments Schedule** screen from the **Navigation Panel.**

2) Find the **Agent Assignments Schedule** you wish to delete, highlight by clicking on it, and then click the red **X** under the **Delete** column.

3) A confirmation pop-up will appear confirming your selection. Click **OK**, you will see a message stating **Changes Saved**.
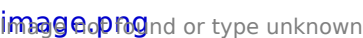
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Queue Leave Conditions

Overview

This screen is for setting maximum wait times that callers may wait in a Queue before going to an unavailable destination. This is optional, but it is useful if there is a need for a caller to be sent to **Voicemail,** a specific extension, or even another Queue, among other options. It is useful because you can specify certain periods in the day when there may be a shortage of Agents in the Queue or when they may be too busy to receive incoming calls.

Ensure that you selected the correct Queue before making any changes. You can select a Queue via the drop-down menu in the top left-hand portion of the **Queue Leave Conditions** screen (see image below).

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Adding a New Queue Leave Condition

1) Navigate to the **Queue Leave Conditions** screen from the **Navigation Panel.**

2) Select the correct **Queue** via the drop **Select Queue** function at the top left-hand part of the screen.

3) Click the button labeled **New Queue Leave Condition**.

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4) Next choose a **Start Time, End Time, Caller Wait Time,** and **Goto** destination.

	Name	Type	Description
Required	Start Time	List	Start Time (24 hour clock)
	End Time	List	End Time (24 hour clock)
	Caller Wait Time	List	Caller Queue Queue Wait Time (15 second increments)

	Name	Type	Description
Image not found or type unknown		Field	Handle agents sent to unavailable destination

5) Click the **Save Queue Leave Condition** button. After you click save you will see a message stating **Changes Saved**.
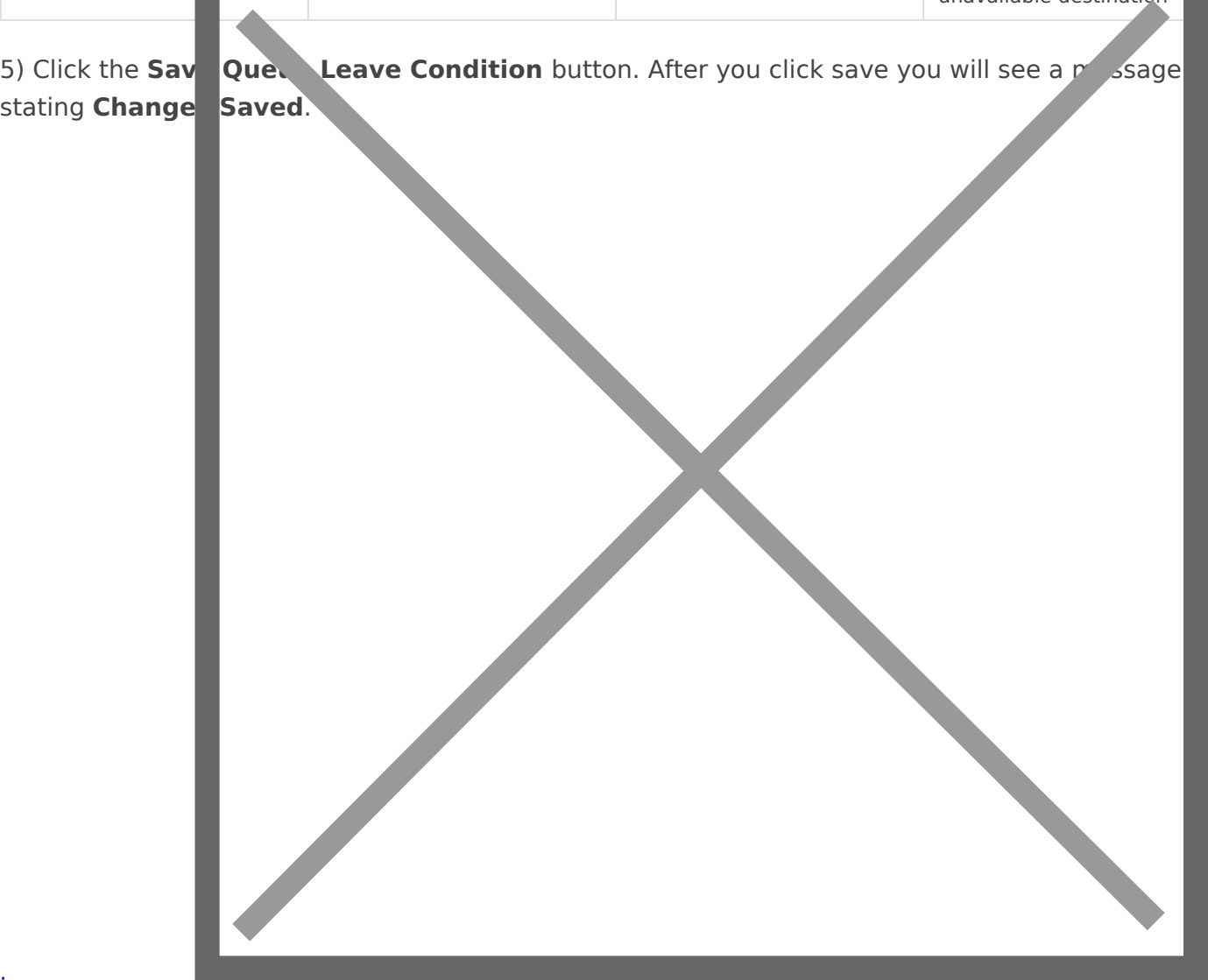
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Removing a Queue Leave Condition

1) Navigate to the **Queue Leave Condition** screen from the **Navigation Panel.**

2) Find the **Queue Leave Condition** you wish to delete, highlight it by clicking on it, and then click the red **X** under the **Delete** column.

3) A confirmation pop-up will appear confirming your selection. Click **OK.** You will see a message stating **Changes Saved.**

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Queue Settings

Overview

This screen is for creating and configuring basic settings for new Queues**.** There are a handful of required settings and a larger group of **Additional Settings** that may be required depending on what your organization is trying to achieve on a per-queue basis.

- Adding a Queue
    - Additional CallQueue Settings
- Removing a Queue

Adding a Queue

1) Navigate to the **Queue Settings** screen from the **Navigation Panel.** Click the **New Queue** button.

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2) Next choose a **Queue** name, **Description,** and **Strategy.**

	Field	Type	Description
Required	Queue	Field	Name of Queue
	Description	Field	Description of Queue
	Strategy	List	How Queue behaves when it calls available Agents (see below)

Strategy	Description
Random	Calls agent in a true random fashion.
Round Robin (Login)	Calls Agent in a circular order based on login time.
Linear (Login)	Calls are based on who has logged in first.
Ring All	Calls all available agents (not currently on a call).

Strategy	Description
Fewest Minutes (Usage)	Calls agent with the fewest minutes of talk time for queue calls with respect to the rest of the agent team's login time.
Fewest Minutes	Calls the first available agent with the fewest minutes of talk time for queue calls (and only queue calls).
Fewest Calls (Usage)	Uses the same logic as **Fewest Minutes Usage** except uses total queue calls as the basis.
Fewest Calls	Will call the first available agent with the fewest number of calls (only queue calls are counted).
Last Recent	Will call the agent who has not gotten a queue call for the longest (does not factor in other activity).

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3) Lastly, click the **Save New Queue** button to save**.** After you click save you will see a message stating **Changes Saved**.

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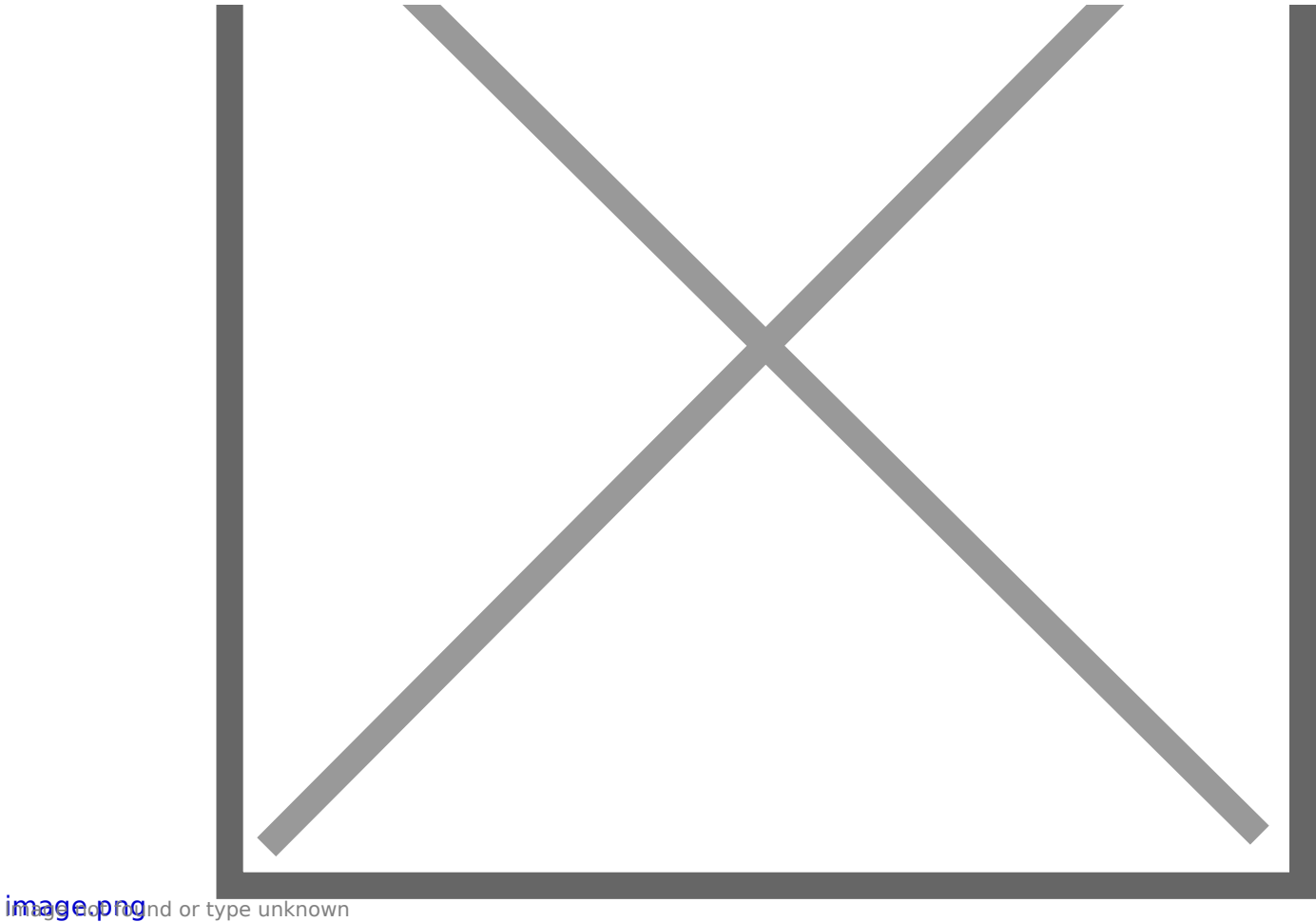
Additional CallQueue Settings

There are additional settings to consider when configuring a new Queue. These settings are located on the right side of the Queue Settings screen and are as follows.

Name	Value
Queue Timeout	Maximum time a caller can wait in this queue.
Agent Timeout	How long to ring an agent before trying the next.
Wrap Up Time	How long to pause calls to an agent after a call.
Agent Auto Logout	Yes/No: Defines whether or not an agent is automatically logged out if they do not pickup
Join Empty	Yes/No: Defines whether or not a caller can enter an empty queue (no agents)

Name	Value
Leave Empty	Yes/No: Defines if a caller shall leave a queue if it becomes empty.
Goto Voicemail on Timeout	Defines where caller is sent if the queue times out (if this is set above)
Goto Voicemail on Empty	Defines where caller is sent if the queue has not available agents
Goto Voicemail DTMF Context	Allows a caller to exit a queue and be sent to voicemail by digit entry on phone
Goto Elsewhere on Timeout	Defines where the caller goes if they timeout, if not a voicemail.
Goto Elsewhere on Empty	Defines where the caller goes if their are no agents available in the queue , if not a voicemail.
Goto Elsewhere on DTMF Context	Defines a different destination that caller will be sent to if they digit press on their phone.
Goto Elsewhere on NightMode	Sends the caller elsewhere if the queue in question is in night mode. See **DayNight Schedule** and **Agent Assignments** for additional information.

After you make changes in the **Additional CallQueue Settings** click the **Save** button at the bottom. You will see a message stating **Changes Saved.**

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Removing a Queue

1) Navigate to the **Queue Settings** screen from the **Navigation Panel.**

2) Find the **Queue** you wish to delete, highlight it by clicking on it, then click on the red **X** in the **Delete** column.

3) A confirmation pop-up will appear confirming your selection. Click **OK.** You will see a message stating **Changes Saved**.

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Generate Reports (IntellaQueue)

Generate Reports (IntellaQueue)

Please navigate to the appropriate category on the left-sidebar.

Agent Calls

Field	Description
Agent Name	Name of the agent
Date	The date within the date range selected
Tot Login	Total amount of time the agent has been logged in
Calls In	# of inbound calls to the agent while the agent is logged in
Queue In	# of inbound queue calls only
Agent In	# of non-queue inbound calls
Avg Talk In	Average time agent is talking for inbound calls
Tot Talk In	Total time the agent is talking for inbound calls
Calls Out	# of outbound calls from agent while the agent is logged in
Dialer Out	# of dialer calls only
Agent Out	# of outbound calls only

Field	Description
Avg Talk Out	Average time agent is talking for outbound calls
Tot Talk Out	Total time agent is talking on the phone for outbound calls
Tot Calls	# of total calls
Tot Talk	Total time the agent is talking on all calls
Avg Answer	Avg amount of time it takes an agent to pick up a ringing call
Longest Wait	Max time a caller waited before getting picked up Wait times for both inbound and outbound queue calls
Tot Hold In	Total time agents put callers on hold for all queue calls
Tot Pause	Total time agents put callers on hold for all queue calls
Avg Pause	Avg time agents put callers on hold for all queue calls
Pauses	# of pauses

Missed Rings	# of calls that rang the agent who didn't pick up Ex: call rings agent's phone, gives up, next agent answers The first agent has a missed ring.
Xfer Calls	# of calls the agent received that were transferred

Agent Calls Full

Field	Description
In - Total Calls	# of all inbound calls to agent (queue and direct)
In - Agent Total	# of direct only calls (non queue calls) to agent
In - Queue Total	# of inbound queue only calls
In - Queue External	# of queue only calls from external callers
In - Queue Internal	# of queue only calls from internal extensions
Total Calls	# of total calls answered or made by the agent
In - Queue Hold Avg	Average hold time per queue only call
In - Queue Answer Avg	Average ring time per queue only call (answer speed)
Total Avg Talk	Average talk time across all calls for agent
In - Total Talk Avg	Average talk time per call for all inbound calls
In - Queue Talk Avg	Average talk time per call of queue only calls
In - Queue Wait Max	Longest time waiting until picked up queue only calls
Agent Name	Name of the agent
Date	The date within the date range selected
In - Queue Hold Total	Total hold time callers are on hold for queue only calls
Total Login	Total logged in time for the agent
Total Talk	Total talk time across all calls for agent
In - Total Talk	Total talk time across all calls for agent
In - Queue Talk Total	Total talk time of queue only calls

Field	Description
In - Agent Talk Avg	Average talk time per direct only calls to agent
In - Agent Talk Total	Total talk time of direct only calls to agent
In - Agent Ext	# of direct only calls to agent from external callers
In - Agent Int	# of direct only calls to agent from internal extensions

Out - Total Calls	# of outbound calls from agent (dialer and direct)
Out - Total Talk	Total talk time for outbound only calls
Out - Total Talk Avg	Average talk time per outbound only call
Out - Dialer Total	# of dialer only calls
Out - Dialer Talk Avg	Average talk time per dialer only calls
Out - Dialer Talk Tot	Total talk time of dialer only calls
Out - Agent Total	# of direct agent outbound only calls
Out - Agent Ext	# of direct agent outbound only calls to external numbers
Out - Agent Int	# of direct agent outbound only calls to extensions
Out - Agent Talk Avg	Average talk time per direct agent outbound only calls
Out - Agent Talk Total	Total talk time of direct agent outbound only calls
Pause Total	Total pause time for the agent across all queues (in and out)
Pause Avg	Average pause time per pause across all queues
Pause Count	# of pauses across all queues
Missed Rings	# of calls that rang the agent who didn't pick up
Xfer Calls	# of calls the agent received that were transferred

Per-Agent Per-Queue

Field	Description
Agent Name	Name of the agent
Date	The date within the date range selected
Logged In	Total time agent has been logged in for the particular queue
Queue	Queue name the agent is logged into
Tot Calls	# of calls the agent answered for the particular queue
Avg Talk	Average talk time per call for the particular queue calls
Tot Talk	Total talk time across all calls for the particular queue calls
Answer Speed	Average ring time per particular queue call

Field	Description
Longest Wait	Max time a caller waited before getting picked up for queue
Tot Hold	Total hold time callers are on hold for the particular queue
Avg Hold	Average hold time per call for the particular queue
Tot Pause	Total pause time for the agent for the particular queue Note that the grand total for the agent is multi-counted
Avg Pause	Average pause time for the agent for the particular queue
Pauses	# of pauses for the agent for the particular queue Note that the grand total for the agent is multi-counted
Missed Rings	# of calls that rang the agent who didn't pick up

| Xfer Calls | # of calls agent received that were transferred to the queue |

Per-Queue Per-Agent

Field	Description
Queue	Queue name all the agents are logged into
Agent Name	Name of the agent logged into the particular queue
Date	The date within the date range selected
Tot Login	Total time agent has been logged in for the particular queue
Tot Calls	# of calls the agent answered for the particular queue
Avg Talk	Average talk time per call for the particular queue calls
Tot Talk	Total talk time across all calls for the particular queue calls
Answer Speed	Average ring time per particular queue call

Field	Description
Longest Wait	Max time a caller waited before getting picked up for queue
Tot Hold	Total hold time callers are on hold for the particular queue
Avg Hold	Average hold time per call for the particular queue
Tot Pause	Total pause time for the agent for the particular queue
Avg Pause	Average pause time for the agent for the particular queue
Pauses	# of pauses for the agent for the particular queue
Missed Rings	# of calls that rang the agent who didn't pick up
Xfer Calls	# of calls agent received that were transferred to the queue

Per-Queue Wait Cutoffs

Field	Description
Queue	Name of the queue
Date	The date within the date range selected
# 0-30 sec	# of calls for queue for duration within 0 to 30 seconds
% 0-30 sec	% of calls for queue for duration within 0 to 30 seconds
# 31-60 sec	# of calls for queue for duration within 31 to 60 seconds
% 31-60 sec	% of calls for queue for duration within 31 to 60 seconds
# 61-120 sec	# of calls for queue for duration within 61 to 120 seconds
% 61-120 sec	% of calls for queue for duration within 61 to 120 seconds
# 121+ sec	# of calls for queue for duration of more than 121 seconds
% 121+ sec	% of calls for queue for duration of more than 121 seconds

Avg Calls Per Hour Per Day

Field	Description
Date	The date within the date range selected
Queue Name	Name of the queue
Average Active Calls Per Hour For The Day	Average # calls for each hour calls were received, for the day.

Calls Per Day Of Week

Field	Description
Day	The day of the week, Monday, Tuesday, etc
Queue Name	Name of the queue
Total Calls For Day Of Week	Total calls for each day of week. If the span is 4 weeks, then for all calls made for each day of the week are totaled. There may be certain days of the week that have many more calls than other days.

Call Volume Per Queue (partial)

Field	Description
Date	The date within the date range selected
Queue Name	Name of the queue
Tot Calls	# of calls per queue for the interval selected
Tot Answered Calls	
Avg Answer Speed	
Avg Queue Wait	
Tot Missed Rings	
Tot Duration	Total time of all calls per queue for the interval selected
Avg Duration	Average call duration per call per queue for the interval selected

Queue Busy Hour

Field	Description
Date	The date within the date range selected
Queue Name	Name of the queue
Average Active Calls	Avg calls for particular hour possibly across multiple days.

Agent Activity

Field	Description
Date	Date and time of the agent activity, either a login or a logout
Agent First Name	First name of the agent involved with the login or logout
Agent Last Name	Last name of the agent involved with the login or logout
Queue Name	Name of the queue the agent was logged in or logged out of
Login / Logout	Either login or logout noting the type of activity

Agent Logins

Field	Description
Login	Login time for the agent
Logout	Logout time for the agent
Duration	How long the agent was logged in for
Agent First Name	First name of the agent who was logged in
Agent Last Name	Last name of the agent who was logged in
Queue Name	Name of the queue the agent was logged in
Logout Reason	Why the agent was logged out of the queue

Agent Login Week (needs all info)

Field	Description
Agent Name	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Total Login	
Avg Login	

Agent Pauses (needs all info)

Field	Description
Start	
Stop	
Duration	
Agent First Name	
Agent Last Name	
Queue Name	
Status	
Start Reason	
Stop Reason	

Agent Pause Summary

Field	Description
Agent Name	Name of the agent logged
Date	The date within the date range selected
Pause Status	Various pause codes the agent has used during date range
Pause Duration	How long each pause code has been active
Avg Pause	Average pause time for the agent per individual pause
Max Pause	Longest pause time across the particular pause code
Num Pauses	# of pauses for the agent

System Summary (needs all info)

Field	Description
Date	
All Calls	
All Answered	
All Missed	
Invalid	
Forwarded	
Queue Voicemails	
Manual	
Manual Answered	
Manual Missed	
InQueue	
InQueue Answered	
InQueue Missed	
Inbound	
Inbound Answered	
Inbound Missed	
Other	
Other Answered	
Other Missed	
Queue	
Queue Answered	

Field	Description
Queue Missed	
Dialer	
Dialer Answered	
Dialer Missed	
Dialer Connected	
Dialer Unconnected	
Talk Total	
Talk Manual	
Talk InQueue	
Talk Inbound	
Talk Other	
Talk Queue	
Talk Dialer	
Avg Talk	
Avg Talk Manual	
Avg Talk InQueue	
Avg Talk Inbound	
Avg Talk Other	
Avg Talk Queue	
Avg Talk Dialer	

Executive Report (needs all info)

Field	Description
Avg Talk Dialer	
Date From	
Date To	
Incoming Calls	
Manual Calls	
Dialer Calls	
Dialer Calls Answered	
Dialer Agent Answered	
Total Calls Handled	
Voicemails	
Missed Calls	
Tot Talk Time	
Avg Talk Time	

Queue Bailout (needs all info)

Field	Description
Time	
From Num	
From Name	
Queue	
Jump	
Type	
Voicemail	
Night Mode	
DTMF	
Target	

Queue Bailout Summary (needs all info)

Field	Description
VM Total	
Queue	

Voicemail Per Hour (needs all info)

Field	Description
Hour	
Mailbox	
Num Voicemails	

Overview

Welcome to the **IntellaQueue** documentation space. This space is dedicated to organizations that are running a call center style phone system and have our IntellaQueue product licensed. Here you will find detailed instructions on how to add and manage Agents, Queue, and powerful **Report Generation.** Similar to the **Core Web Portal** each space represents a **screen** within the IntellaSoft Web Portal, and can be accessed from the **Navigation Panel**. The IntellaQueue components are typically contained within a collapsible folder called Call Center in the web portal, as shown below.

For more advanced system customization see:

- **Agent Editor** for adding and removing **Agents,** as well as setting **Agent** login information
- **Agent Assignments** for add/removing **Agents** to **Queues,** and vice versa (associating agents with **Queues)**
- **Agent Assignments Schedule** for configuring **Queue** parameters for **Agents**
- **Queue Leave Conditions** for configuring parameters for **Agents** to be removed Queues (such as when no callers are waiting/incoming)
- **Queue Settings** for adding new **Queues** and configuring basic settings for said **Queues**
- **Generate Reports** powerful report generation gathered from **Agent** and **Queue** calls.
- **Call Center Data** contains data about calls made to and from **Queues** in a hierarchical format.

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Call Center Data

We are rebuilding this page. Stay tuned for updates!

Installation

How to Install IntellaQueue PC Toolbar

1) Download the application.

2) Open your downloads folder

3) Run `intellaQueue-setup.exe`

4) On the IntellaQueue pop-up, hit the install button

5) On the next page check the accept checkbox and let the installation run

6) When this is done, you will have this desktop icon. Run it

7) Once you run it, you will be prompted with the Database Settings Window

8) Click Connect

9) Replace `cxxxxx` with your client ID, including the c

10) Replace `yyy` with the desired extension

11) Replace `zzzz` with the Agent Number set in the agent editor

12) Press login

Web Toolbar Login

1) Go to https://toolbar.intellasoft.net/

2) Enter the user's Extension (Client ID-Extension Number), Agent Number, and Agent Pin

3) This will bring the agent toolbar up, where the user needs to hit the login button