Call Centre

General Telephony

Platform:	**1StreamCRM**
Version:	**14.0**
Application:	**Call Centre**
Topic:	**General Telephony**
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1STREAM

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What is General Telephony

You can use the call controller in 1Stream CRM to communicate with colleagues within your organisation or with external contacts. These are standard telephony functions referred to as General Telephony and are available in addition to inbound queue and outbound campaign telephony.

Dialling Internal Contacts

To call internal contacts via their extension, you will need to have access to the keypad dialler. Speak to your supervisor if you require access to the keypad.

To make calls via the keypad, do the following:

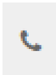
1. Click the **Keypad** icon on the call controller . The keypad pop-up is displayed.

Figure 1 - Call Controller

2. Enter the required extension.

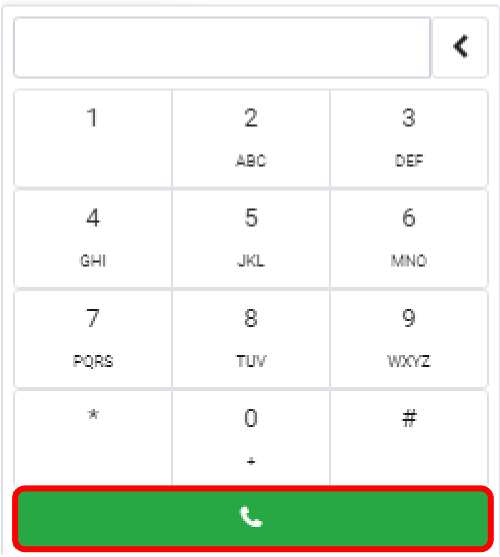
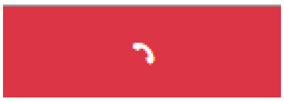


Figure 2 - Keypad

Note:
You will need to know the extensions of the internal contacts you want to speak to.

3. Click the **Dial** button.

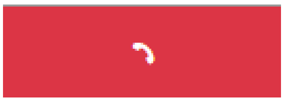
4. Click the **End Call** button once the call is complete.


Note:
You can use the keypad in the same way for an external call for a number that you know.

Dialling External Contacts

Call a Contact

You are able to call a contact directly from their contact card, provided the phone number is captured. To call a contact, do the following:

1. Click the number next to the **Primary No.** or **Secondary No.** field. The number is automatically dialled.
2. Click the **End Call** button once the call is complete.


Note:
Calling contacts is not limited to the Contacts application. You can call from any document, in any application, provided the document has customer information that includes their number.

Managing Outbound Calls

Calls can be made from any application that has a phone number captured to a document, for example, Helpdesk Ticket or Lead/Opportunity. In this example a contact card is used from the **Contacts** application.

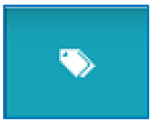
Follow these steps to make an outbound call:

1. Click **Contacts** in the applications view. All contacts are displayed.

   Note:
   Contacts open in a card view. You can change the view by clicking the list icon at the right top of the page.

2. Search for the contact you want to call.
3. Select the contact you require. The **Contact Card** is displayed.
4. Click the number to dial the contact.

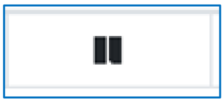
5. Complete the call with the contact.
6. Click the **Outcome** icon to wrap-up the contact.



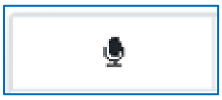
The following options are available while on the call:

- Transfer the call

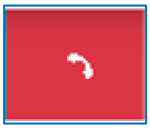
- Place the call on hold



- Mute the call



- End the call



Follow these steps to transfer a call:

1. Click the down-arrow next to the call controller.
2. Click the **Transfer** icon. The **Transfer Call** dialog box is displayed.
3. Select the radio button for where you want to transfer the call to. The following options are available:

    - Internal Phone Line
    - External Number
    - Queue

4. Select the user, contact or queue you want to transfer to by clicking the drop-down arrow next to the **User**, **Contact** or **Queue** field. The **Number** field is automatically populated when the contact is selected.

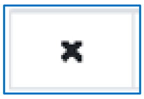
    Note:
    The fields are searchable and differ depending on which transfer option was chosen. You are only able to transfer a call to a contact that exists in the system.

5. Click the **Attended** button for a warm transfer to conference with the third party.
6. Click the **Blind** button for a cold transfer.

Note:
The **SIP Refer** button and the **Blind** button have the same function.

7. Click the **Complete Transfer** icon to complete the transfer.

Note:
Click the **Abort Transfer** icon to cancel a transfer.

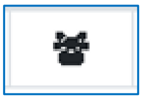


Note:
Complete and abort transfer options are accessed by clicking the down-arrow on the call controller.

8. Click the **Outcome** button to wrap-up the contact.

Follow these steps to conference a call:

1. Click the **Conference** icon. The **Conference Call** dialog box is displayed.



2. Select the radio button for where you want to conference. The following options are available:

    - Internal Phone Line
    - External Number
    - Queue

3. Select the user, contact or queue you want to transfer to by clicking the drop-down arrow next to the **User**, **Contact** or **Queue** field. The **Number** field is automatically populated when the contact is selected.

    Note:
    The fields are searchable and differ depending on the transfer option that was chosen.

4. Complete the call.

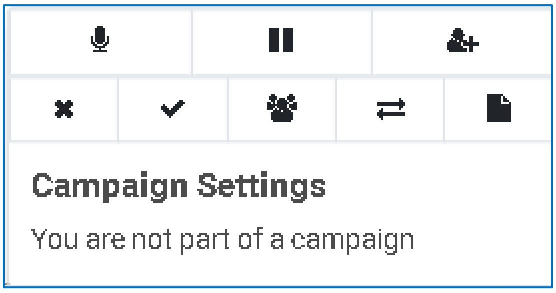


Figure 3 - Transfer Controller