

# RingCentral Call Queues

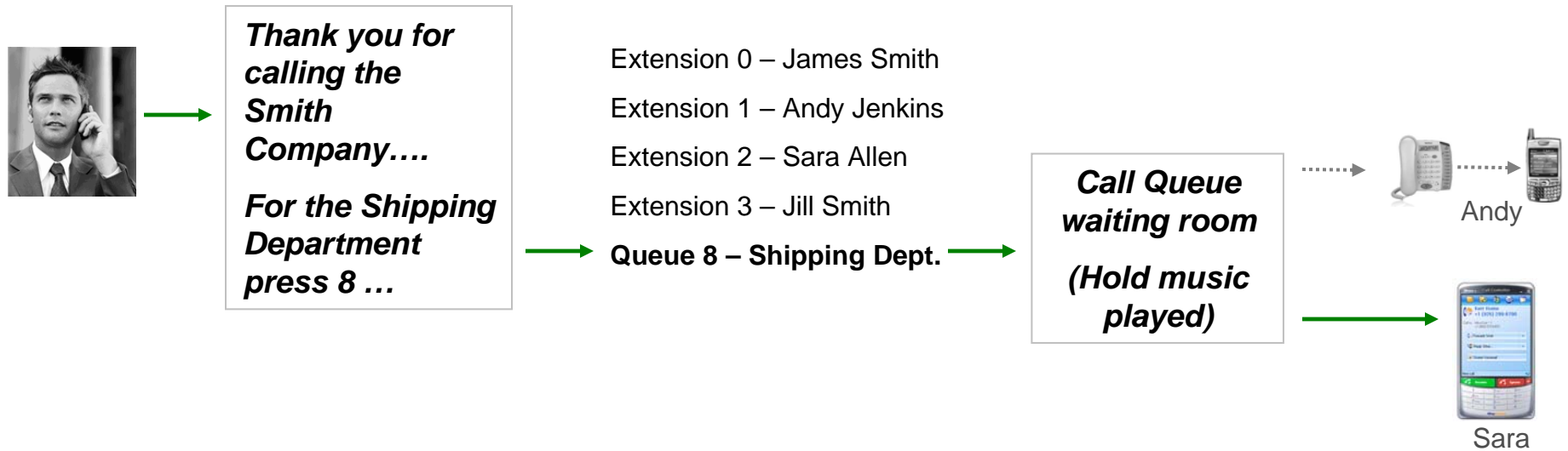
August 2008

- a) How does it work?
- b) Setting up Queues
- c) Agent actions to take a call in the queue
- d) Reporting Tools

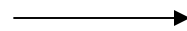


**a. How does it work?**

# How does RingCentral Call Queues work?



*Customer calls your RingCentral number and presses 8 for Shipping*



*He waits in the queue, while RingCentral forwards the call to the **extensions** of two employees. Andy's work phone and mobile rang, but he did not answer. Then, Sara answered the call on her softphone.*

## Why should you use RingCentral Call Queues?

- ✓ Forward callers to multiple extensions
- ✓ Keep their callers on hold indefinitely or for a set period of time while trying to locate or more agents
- ✓ Easily communicate to customer he can press 1 to leave a message, if he doesn't wish to remain on hold.
- ✓ Choose from more routing options than Answering Rules:

	Call Queues	Answering Rules
Sequentially in Fixed Order	✓	✓
Sequentially in Rotating Order	✓	✓
Simultaneously	✓	✓
Random Order	✓	
Fewest Numbers of Calls	✓	
Longest Waiting	✓	
Skill Based	✓	

## **b. Setting up Queues**

**Step 1** – In Extensions, click the Call Queues tab, then click **Add a Queue ...**

Overview Messages Call Log Contacts **Extensions** Preferences Download

**EXTENSIONS**

- ▶ Summary
- ▶ Company Rules
- ▶ Company Greetings
- ▶ Company Directory
- ▶ Settings

**QUEUES**

- ▶ Summary
- ▶ Agents
- ▶ Status
- ▶ Reports

**Call Queues Summary**

Extensions **Call Queues**

**Introducing RingCentral Call Queues**  
**Never have another important call go to voicemail!**

**FREE Preview**

Rather than going to voicemail, give your callers the opportunity to stay on the line and have their call answered live with a RingCentral Call Queue. Often referred to as ACD (Automatic Call Distribution), RingCentral Call Queues will give you the ability to queue incoming calls, play music and messaging while callers hold and route calls automatically to any phone.

- ✓ Unlimited number of agents and queues
- ✓ Up to 50 callers on hold in each queue
- ✓ Forward calls to remote offices and employees
- ✓ Report on Queue and Agent call activity
- ✓ Rules and skills based call routing
- ✓ Custom greetings and Music/Messaging on hold

**Add A Queue >>**

**Step 2** – Check the box next to each Agent who will take calls from the queue, then press Continue.

- Overview
- Messages
- Call Log
- Contacts
- Extensions
- Preferences
- Download

**EXTENSIONS**

- ▶ Summary
- ▶ Company Rules
- ▶ Company Greetings
- ▶ Company Directory
- ▶ Settings

**QUEUES**

- ▶ Summary
- ▶ Agents
- ▶ Status
- ▶ Reports

### Add Queue - Getting Started

- 1. Queue Information**
- 2. Answering Options

First, you will need to select some of your current Extensions as Agents (Agents will be used within your Queue's Answering Rules). If you haven't yet set up an Extension for each Agent you plan to use in your Queues, just click Continue; you can configure this Queue now and add Agents to it later.

Ext.	Name	Agent
0	System Extension	<input type="checkbox"/>
1	Andy Jenkins	<input checked="" type="checkbox"/>
2	Sara Allen	<input checked="" type="checkbox"/>
3	Jill Smith	<input checked="" type="checkbox"/>

Send an email to the selected extensions with instructions on how to use Queues

CONTINUE

**Step 3** – Complete Queue Information and press Continue.  
(Note: the number used for a queue cannot conflict with an extension number).

### Configure Queue - Queue Information

1. Queue Information    2. Answering Options

#### Basic Information

Queue:  [What's this?](#) [See Numbers in Use](#)

Name:

Email Address:

The Queue Number is what your callers will dial on their phone to access this queue from your Company Greeting. You must choose a Queue number that is not already in use by another extension or queue. For more information on how to set up queues with existing extensions, click the [Get Help!](#) button found on this page.

#### Password & Security

New numeric password:

Re-enter new password:

Use between 5 and 10 digits. Cannot contain repeating or sequential digits (such as 22222 or 12345) or match any of your personal or account information. Please write this password down and store it in safe place.

[CONTINUE](#)

## Step 4 – Complete the Answering Options for this Queue (details on next pages):

1. Queue Information
2. Answering Options

**When a caller enters the Queue:**

1. Play an Introductory Greeting:  ▶ New Edit ✕

Enable Call Screening:  ▶ New Edit ✕

Call Screening Prompt:  ▶ New Edit ✕

Connect Prompt:  ▶ New Edit ✕

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**While the caller is waiting:**

2. Play Music On Hold:  ▶ New Edit ✕

[▶ Advanced Music On Hold Options](#)

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**Try to locate an available agent:**

3. Send the calls to agents in this sequence:  ▶ New Edit ✕

Active	Order	Agent Name	Ext Number
<input type="checkbox"/>		Andy Jenkins	1
<input type="checkbox"/>		Sara Allen	2
<input type="checkbox"/>		Jill Smith	3
<a href="#">Select All</a>		<a href="#">Select more agents...</a>	

**Sequentially in Fixed Order**

When multiple agents are available (not on a call), the system will attempt to reach them in the exact order you specify in the list.

If none are available, the caller will wait on hold and will be sent to the first agent that becomes available.

Maximum time to wait for an agent to answer before trying the next:  [What's this?](#)

Post-call wrap up time before agent's status is automatically set available:  [What's this?](#)

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**4. Voicemail Options:**

Automatically send caller to voicemail if they are on hold for more than:  minute(s).

If the total number of callers waiting in the queue exceeds:

Automatically send new callers to voicemail

Advise new callers of heavy call volume and to call again later

Play Voicemail Greeting:  ▶ New Edit ✕

Deliver new messages to:

SUBMIT

## Step 4 – Complete the Answering Options

### 1. When a caller enters the Queue:

*Choose Introductory Greeting caller hears when entering:*

"Thank you for calling [Queue Name]..."  
"Hello, you have reached [Queue Name]..."  
No - Play Ring Back Tones Only  
No - Play Music On Hold Only

#### When a caller enters the Queue:

Play an Introductory Greeting:

"Thank you for calling [Queue Name]..."

New Edit X

Enable Call Screening:

Only if Caller ID is not present

Call Screening Prompt:

"Please say your name..."

New Edit X

Connect Prompt:

Please hold for next available agent...

New Edit X

*Screen the caller, if you wish*

No  
On all calls  
Only if Caller ID is not in Contacts  
Only if Caller ID is not present

*If screening is Enabled, select the Prompt message*

Please hold for next available agent...  
Please stay on the line for next available agent...

## Step 4 – Complete the Answering Options

### 2. While the caller is waiting:

*Choose the Hold music callers will hear while waiting in the queue:*

**While the caller is waiting:**  
Play Music On Hold:      
[▶ Advanced Music On Hold Options](#)

*Clicking “Advanced...” link will bring up four more fields - “music on hold” options*

*Click New to record or upload your own music file.*

**While the caller is waiting:**  
Play Music On Hold:      
     
Interrupt with prompt:      
 Ask the caller if they want to skip to voicemail by pushing # every:  minute(s).  
Keep Waiting Prompt:      
[▲ Advanced Music On Hold Options](#)

## Step 4 – Complete the Answering Options

### 3. Try to locate an available agent:

*Assign which agent (extension) will participate in answering calls to this queue. The “Agent Profile Rule” in Andy’s extension will be used to forward the call to his phone(s):*

**Try to locate an available agent:**

Send the calls to agents in this sequence:

Active	Order	Agent Name	Ext Number
<input checked="" type="checkbox"/>	▼ ▲	Andy Jenkins	1
<input checked="" type="checkbox"/>	▼ ▲	Sara Allen	2
<input type="checkbox"/>		Jill Smith	3
<a href="#">Select All</a>		<a href="#">Select more agents...</a>	

Maximum time to wait for an agent to answer before trying the next:  [What's this?](#)

Post-call wrap up time before agent's status is automatically set available:  [What's this?](#)

**Sequentially in Fixed Order**  
When multiple agents are available (not on a call), the system will attempt to reach them in the exact order you specify in the list.  
  
If none are available, the caller will wait on hold and will be sent to the first agent that becomes available.

This option specifies how long wait after an agent completes a call before automatically setting their status to "Available".

If an agent does not answer within this threshold, the queue will stop the call to the current agent and will move onto the next available agent.

Send the calls to agents in this sequence: Sequentially in Fixed Order

Active	Order	Agent Name
<input checked="" type="checkbox"/>	▼ ▲	Andy Jenkins
<input checked="" type="checkbox"/>	▼ ▲	Jill Smith
<input type="checkbox"/>		System Extension

- Sequentially in Fixed Order
- Sequentially in Rotating Order
- Simultaneously
- Random Order
- Fewest Numbers of Calls
- Longest Waiting
- Skill Based

Send the calls to agents in this sequence: Skill Based

Active	Skill	Agent Name	Ext Number
<input checked="" type="checkbox"/>	High	Andy Jenkins	1
<input checked="" type="checkbox"/>	Low	Jill Smith	3

**Sequentially in Fixed Order** When multiple agents are available (not on a call), the system will attempt to reach them in the exact order you specify in the list. \*

**Sequentially in Rotating Order** When multiple agents are available, the system will rotate (in the order you specify) the first agent that is called (aka "Round Robin"). Great for distributing Sales calls, for example. \*

**Simultaneously** When multiple agents are available, the system will forward the caller to all of the available agents at the same time. \*

**Random Order** When multiple agents are available, the system randomly selects an agent to forward call. \*

**Fewest Number of Calls** When multiple agents are available, the system will forward the call to the agent who has answered the least amount of calls within a 1 hour period. \*

**Longest Waiting** When multiple agents are available, the system will forward the call to the agent who whose been available the longest without answering a call. \*

**Skill Based** (see upper right screen-shot for example) When multiple agents are available, the system will always forward the call to the agent with the highest skill level (High, Medium or Low) within the queue. \*

\* If none are available, the caller will wait on hold and will be sent to the first agent that becomes available.

## Step 4 – Complete the Answering Options

### 4. Voicemail Options:

*This sets the maximum time callers will be waiting in the queue. Choose from 1 to 60 minutes.*

**Voicemail Options:**

Automatically send caller to voicemail if they are on hold for more than:  minute(s).

If the total number of callers waiting in the queue exceeds:

Automatically send new callers to voicemail

Advise new callers of heavy call volume and to call again later

Play Voicemail Greeting:

Deliver new messages to:

*If this “Advise...” choice were selected, caller would not be able to leave a voicemail message. He would hear a pre-set “Announcement” greeting telling him to call back later.*

*If 25 callers are currently waiting in the queue, the 26<sup>th</sup> caller will be sent straight to voicemail.*

**Step 5** – Configure Business Hours for this new Queue (optional), and complete the setup wizard.

Add Queue - Almost Done - Shipping Dept.

1. Queue Information 2. Answering Options

Your Shipping Dept. has been created!

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**You're Almost Done...**

Would you like to configure the Business Hours (hours of operation) for this Queue now? If you do not set your Business Hours, your queue will be open 24 hours a day.

YES, I'LL SET THEM NOW NO, I'M FINISHED



That's it! Your Queue is now ready for calls.

**Note 1: Queue Maintenance** – Click one of the links to edit queue information:

Call Queues Summary

Extensions		Call Queues						
Queue	Name	Messages		Priority	Status / Change	Rules	Preferences	Delete
		New	Saved					
<a href="#">8</a>	<a href="#">Shipping Dept.</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">Medium</a>	<a href="#">Enabled</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

ADD QUEUE      DELETE

*Change queue #*

*Add a brand new queue*

*Change Name or email contact*

*More than one queue?  
Assign Priority weighting.*

*Delete the Queue*

**Queue Priority** ✕

If there are calls in multiple queues, Queue Priority will determine which call should be answered first.

High  
 Medium  
 Low

**SUBMIT**

**Note 2: Edit Queue Rules – Click Edit link under Rules column:**

Call Queues Summary

Extensions		Call Queues						
Queue	Name	Messages		Priority	Status / Change	Rules	Preferences	Delete
		New	Saved					
8	Shipping Dept.	0	0	Medium	Enabled	<a href="#">Edit</a>	<a href="#">Edit</a>	<input type="checkbox"/>

[ADD QUEUE](#) [DELETE](#)

*Click one of the links to adjust configurations settings for the Shipping Dept. queue*

*Click Add Rule and use the **“Custom Rule”** wizard to build a new queue that’s automatically reached by Caller’s ID and/or Called RingCentral number.*

[ADD RULE](#)

My Rules		
Enabled	Name	Description
<input checked="" type="checkbox"/>	<a href="#">Business Hours</a>	<b>When:</b> <a href="#">Mon-Fri 9:00AM-6:00PM</a> <a href="#">Edit</a> <b>Introductory Greeting:</b> <a href="#">Default Introductory Greeting</a> ▶ <b>Agents:</b> 1 - Andy Jenkins, 2 - Sara Allen <b>Voicemail:</b> <a href="#">Default Voicemail Greeting</a> ▶
<input checked="" type="checkbox"/>	<a href="#">After Hours</a>	<b>Executes when no other rules apply.</b> <a href="#">Edit</a> <a href="#">Delete</a> <b>Voicemail Greeting:</b> <a href="#">Default Voicemail Greeting</a> ▶

**Note 3: Edit Queue Rules** – To change an employee’s queue participation status, check (or uncheck) their Agent box in the Extension Summary:

Extensions Summary

Extensions		Call Queues							
Ext.	Name	Agent	Messages		Status / Change	Rules	Preferences	Delete	
			New	Saved					
0	James Smith	<input type="checkbox"/>	1	0	Enabled	<a href="#">Edit</a>	<a href="#">Edit</a>		
1	<a href="#">Andy Jenkins</a>	<input checked="" type="checkbox"/>	0	0	<a href="#">Enabled</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<input type="checkbox"/>	
2	<a href="#">Sara Allen</a>	<input checked="" type="checkbox"/>	0	0	<a href="#">Enabled</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<input type="checkbox"/>	
3	<a href="#">Jill Smith</a>	<input checked="" type="checkbox"/>	0	0	<a href="#">Enabled</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<input type="checkbox"/>	

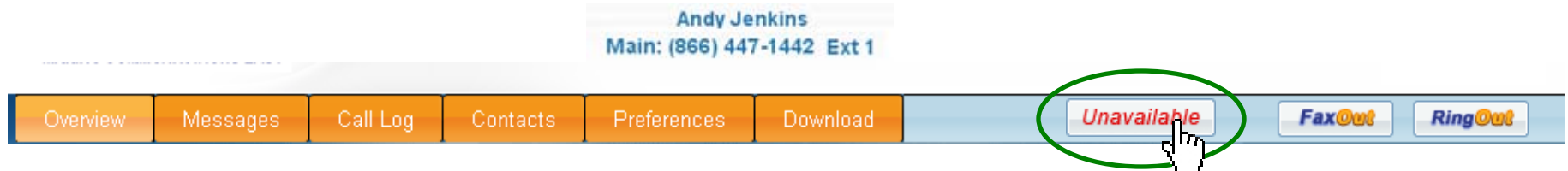


## **c. Agent actions to take a call in the queue**

**Step 1** – Employees mark themselves “Available” to take a call from the queue:  
Andy and Sara, are both marked as queue Agents...

Ext.	Name	Agent
0	James Smith	<input type="checkbox"/>
1	<a href="#">Andy Jenkins</a>	<input checked="" type="checkbox"/>
2	<a href="#">Sara Allen</a>	<input checked="" type="checkbox"/>

... thus, they will both have an Available/Unavailable button found at the top of their online extension window. Since Andy is one responsible for taking calls into the “Shipping Dept.” queue, he will click the button ...



... and his status changes to “Available:”



... and Andy would click the button again to mark himself **Unavailable**

**Step 2** – Andy now logs into his Extension’s Answering Rules page, and sets up his **Agent Profile Rule** – the way all calls will be routed from any queue:

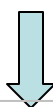
**Answering Rules**

Here is a list of your Answering Rules. When a new call is received, one rule will be executed depending on the time of the call and/or caller.

**CALL SETTINGS**

- ▶ Answering Rules
- ▶ Forwarding Numbers
- ▶ Greetings
- ▶ Music On Hold
- ▶ Blocked/Allowed Numbers

Agent Profile Rule		
Name	Description	
<a href="#">Agent Profile</a>	Executes when a call is offered to you from a Queue.	<a href="#">Edit</a>



**Rule:** Agent Profile Rule

**Conditions:** Executes when a call is offered to you from a Queue

**When my status is Available and I am offered a call:**

Notify my Call Controller and wait  seconds before forwarding begins

Forward my calls:

Active	Order	Group	Phone Name	Phone Number <a href="#">Edit</a>	Ring For	Options
<input checked="" type="checkbox"/>	▼ ▲	📁	📞 Work	+1 (555) 555-4321	<input type="text" value="3 rings"/>	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	▼ ▲		📞 Mobile	+1 (555) 555-1234	<input type="text" value="4 rings"/>	<a href="#">Edit</a>

+1 (555) 555-4321 - Work

Play Queue Name during prompt:

**Set to "On" and you'll have option to Accept or Decline the call.**



That's it! Incoming calls into the queue during Business Hours will now follow the Agent Profile Rules for Andy and Sara:

*Calls will follow Andy's Agent Profile Rules first. If he doesn't answer, Sara's answering rules will be followed.*

Try to locate an available agent:

Send the calls to agents in this sequence:

Active	Order	Agent Name	Ext Number
<input checked="" type="checkbox"/>	▼ ▲	Andy Jenkins	1
<input checked="" type="checkbox"/>	▼ ▲	Sara Allen	2

*Note: If Andy has "Play Queue Name prompt" On:*

+1 (555) 555-4321 - Work

Play Queue Name during prompt:

*... and he presses 2 on his mobile and Declines to take the call, he'll be automatically marked as **Unavailable**, and won't receive any more queue calls.*

To make himself Available again, he can:

1. Log into his account and mark the button **Available** or,
2. Dial into his mailbox and press 4, or
3. If using a DigitalLine IP phone, dial \*37

## **d. Reporting Tools**

**Agent Status** - The Company Administrator (logged into extension 0) can click Extensions/Agents and see which **employee** has marked himself as “Available” to take a queue call:

The screenshot shows a web interface with a top navigation bar containing buttons for Overview, Messages, Call Log, Contacts, Extensions, Preferences, and Download. A mouse cursor is hovering over the 'Extensions' button. On the left, there is a sidebar with two main sections: 'EXTENSIONS' and 'QUEUES'. Under 'EXTENSIONS', there are links for Summary, Company Rules, Company Greetings, Company Directory, and Settings. Under 'QUEUES', there are links for Summary, Agents, Status, and Reports. The 'Agents' link is highlighted with a mouse cursor. The main content area is titled 'Agents Status' and contains a table with the following data:

Ext.	Name	Status
0	James Smith	Unavailable
1	Andy Jenkins	Available
2	Sara Allen	Available
3	Jill Smith	Unavailable

*In this example, calls into the queue will only be routed to Andy and Sara's extension Answering Rules.*

**Queues Status** – Check Status of the *queue* to see who has made themselves “Available” to take a call:

The screenshot shows a navigation bar with the following items: Overview, Messages, Call Log, Contacts, Extensions, Preferences, and Download. The 'Extensions' menu is open, showing a sidebar with 'EXTENSIONS' and 'QUEUES' sections. The 'Status' option under 'QUEUES' is highlighted. The main content area displays the 'Queues Status' table.

Queue	Name	Messages		Agent	Status
		New	Saved		
<a href="#">8</a>	<a href="#">Shipping Dept.</a>	<a href="#">0</a>	<a href="#">0</a>	2 Available 2 Unavailable	<a href="#">View All</a>

*Click View All to display status of all participating extensions*

2 Available 2 Unavailable		<a href="#">Hide</a>
1 – System Extension	Unavailable	
2 – Andy Jenkins 1	Available	
3 – Sara Allen 2	Available	
4 – Jill Smith 3	Unavailable	

**Reports** – Generate reports on Agent and Queue activity, by date range:

Overview Messages Call Log Contacts Extensions Preferences Download

**EXTENSIONS**

- ▶ Summary
- ▶ Company Rules
- ▶ Company Greetings
- ▶ Company Directory
- ▶ Settings

**QUEUES**

- ▶ Summary
- ▶ Agents
- ▶ Status
- ▶ Reports

### Queue Reports

Please use one of the options below to generate a report.

From: July 16 2008 To: July 23 2008

**Report on Agent Activity:**  
Hold down the "Ctrl" key to select multiple

- 1 – System Extension
- 2 – Andy Jenkins 1
- 3 – Sara Allen 2
- 4 – Jill Smith 3

**Report on Queue Activity:**  
Hold down the "Ctrl" key to select multiple

- Shipping Dept.

GENERATE GENERATE