

Mitel® Customer Service Manager

CallViewer

CallViewer provides telephony call control, screen popping, and desktop automation on a Windows-based computer. CallViewer makes extensive use of Caller ID and Dialed Number Identification Service (DNIS).



Note: For detailed information and instructions for CallViewer, refer to the online Help.

Start CallViewer

From the Start menu, select Programs – **Mitel Customer Service Manager**, and then select **CallViewer**.

Main Menu

Right-click the tray bar icon to display the Main Menu, which consists of the following options:

- **Look and Feel:** Allows you to select the look for CallViewer.
- **Buttons:** Allows you to configure the user-defined buttons.
- **Hot Keys:** Allows you to configure the user-defined hot keys.
- **Rules:** Allows you to configure the user-defined rules.
- **Actions:** Allows you to install a Ready-To-Go macro or create a user-defined macro.
- **Network Settings:** Allows you to choose which CSM Server to use.
- **Startup Wizard:** Allows you to run the Startup Wizard again without having to reinstall the software.
- **Help Topics:** Opens the online Help for CallViewer.
- **Options:** Allows you to configure CallViewer options.
- **Save:** Saves any changes.
- **Exit:** Closes CallViewer.

Look and Feel Options

Use the following descriptions to help you select the look and feel option that suits your needs best. Options include:

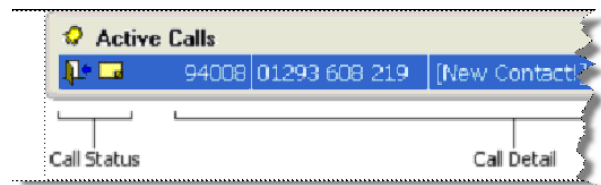
- **Mitel Legacy:** Provides a familiar interface if you are an existing user with its similarity in appearance to previous versions of CallViewer client. The Legacy option has a compact design that requires little desktop space, which makes it ideal for call center agents use; however, it contains the fewest features. It also offers a smaller “mini mode” version with only control buttons.
- **Mitel Executive Display:** Provides a small main window with options to open additional windows for the dial pad, save calls, call history, and user-defined buttons. This option may be preferred by the non-call center user because of its flexibility.

- **Mitel Quick Connect:** Provides call controls in the smallest interface. This option may be preferred by a call center agent who needs basic call control functionality without sacrificing space on the desktop.
- **Mitel Handset:** Provides basic call control through an interface that resembles a telephone display, with additional windows for call history and user-defined buttons.

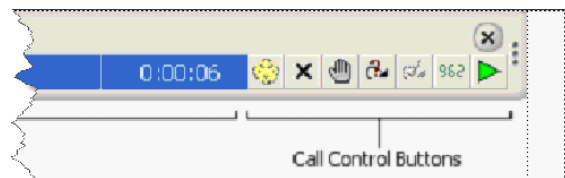
Active Call List

The active call list displays a current list of calls and routed e-mail messages. Depending on which “look” you have selected, the active call list may be displayed in its own window, or it may be located with other information. The active call list sizes itself vertically to include all active calls. Each call in the active call list provides the following information and functions:

- **Call Status:** The call status consists of two icons. The left icon indicates the current call status, (for example, inbound, outbound, answer, alerting, etc.).



- **Call Control Buttons:** The right side of the call list contains one or more call control buttons for each call in the list. You can configure which buttons appear in the list from the Call List Buttons page of the Options dialog. Some buttons may be disabled; this depends on the status of the calls at your extension, whether you are licensed to use the call control feature, and whether the telephone system supports the call control feature.



- **Call Detail:** The call detail area displays one or more fields of information about each active call. If you select more fields than fit on the window, some fields are hidden. You can also double-click an item in the call list to display a dialog box containing all information known about the call.

The color of the text in the call detail area denotes the call type. See the online Help for details.

















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Call Control Buttons

The table below provides a description for the Call Control Buttons.

Button	Description
	Answers the call that is alerting your extension.
	Drops the specified call shown in the Call List.
	Places the specified call on individual hold.
	Places the specified call on system hold.
	Directly transfers an answered call or redirects an alerting call to the specified extension/group.
	Places the specified call on hold, and dials the specified extension/group to make a consultation call for a call transfer.
	Transfers the specified call on hold to the party at the distant end of the current answered call.
	Records the call.
	Annotates the call.
	Sets account code against the call.
	Displays a menu of user actions to execute.
	Executes default macro 1.
	Executes default macro 2.
	Executes default macro 3.

Dial List

CallViewer stores a list of the last 20 dialed or received telephone numbers. The dial list works in a similar fashion to a recent file list – if a telephone number that is already in the list calls or is called, the existing entry is moved to the top of the list, rather than being added to the list again.

Click a dial list button on a window to display a menu containing all the numbers in your recent dial list. Click a number in the list to immediately place a call to that caller from your extension.



Call History

The call history window displays a list of all calls and e-mail messages that have been active at your extension. While CallViewer is running, it stores information about each call or e-mail message at your extension. Up to 5000 items can be stored, depending on which license of CallViewer you have.

Buttons

The following button types are available in CallViewer windows:


- **Fixed Buttons:** These buttons are part of the look. They perform a specific action, such as opening another window, and cannot be changed or removed from the window.
- **User Buttons:** You can create these buttons. When they are created they appear in the “User Button area.” You can choose the action that the button performs when it is clicked and whether to display a picture on the button, and/or a piece of descriptive text.
- **Feature Buttons:** These buttons are similar to both Fixed Buttons and User Buttons. A feature button already exists in a specific location in a look, and often has some default functionality, such as changing the ACD Agent state of the associated CallViewer extension. However, you can edit a feature button to change its assigned action.

Button Manager

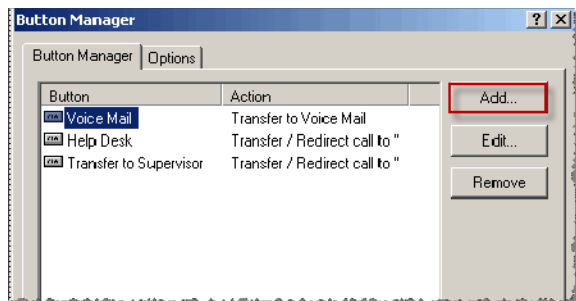
You can create, edit, and delete user-defined buttons that are displayed in the "button area" of a CallViewer window using the Button Manager.

To open Button Manager:

Do one of the following:

- Right-click the CallViewer tray bar icon () and select **Buttons**.
- Open the Buttons window on any of the CallViewer looks.
- Right-click to access the Button Manger shortcut menu, and then click **Buttons**.

Button Manager opens as shown here.

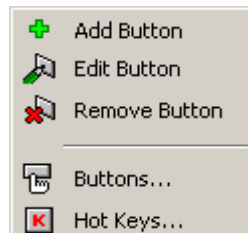


Add a Button

You can create your own button, by adding it. To create a button, do one of the following:

- From the Button Manager, click **Add**.
- From the Buttons window, right-click and then select **Add Button**.

Program the options on the General, Action, and/or the Hot Key tabs as needed. See the "Add/Edit Button Options" in the online Help for details on programming the options.




Quick Connect Button

Several of the looks include a separate Quick Connect button that can be positioned anywhere on the desktop, regardless of whether the main window is minimized or not. The Quick Connect button is a small window that can be dragged by its edges to any position on the desktop.

Place a Call

You can place a call using CallViewer in a number of ways, which are described as follows:

To use the Go Dial option to place a call:

1. Highlight a phone number in another application.
2. Click the Go Dial () button.

To use the Dial List to place a call:

Do one of the following:

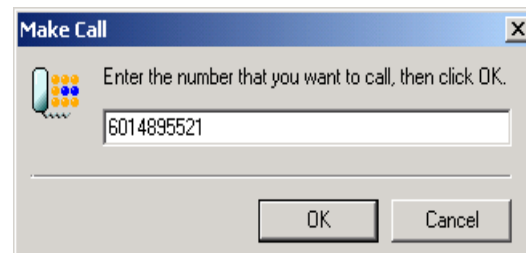
- Click the Dial List Area to select one of the last twenty recently placed calls. The number is dialed when you select it.
- Type a new number in the Dial Area's text box, and press Enter to dial the number.

To use the Call History window to place a call:

Double-click the number you want to call in the Call History window. The number is automatically dialed and the details of the call appear in the Active Call list.

To use the Dial Command to place a call:


1. From the Action menu, select **Dial**. The Make Call dialog box appears.



2. Type the telephone number in the text box, and then click **OK** to dial the number.


Answer a Call

You can answer a call at your extension by doing one of the following:

- Click  on the alerting call in the Active Call List, or on the main window.
- Click the **Answer** button on the main window.
- Select **Answer** from the Action menu.
- Click the CallViewer tray bar icon and select **Answer** from the Primary Menu.
- Press hot keys **Alt + F12** to answer the call.

End a Call

You can end a *single call* at your extension by doing one of the following:

- Click the  button on the Active Call List for the call that you want to drop.
- Select the **Release Call** option from the Action menu.
- Press hot keys **Ctrl + F5** to drop the current call.

You can drop *all calls* at your extension by doing one of the following:

- Use the **Release** command from the Action menu.
- Click the **Release** button on the look's main window.
- Click the CallViewer tray bar icon, and then select **Release** from the Primary Menu.
- Press hot keys **Alt + F11** to release all calls.



Note: Use the Hot Key Manager to reconfigure hot keys if you want to use an alternative key sequence.