



Catalytic Call Centre

Wallboard Guide





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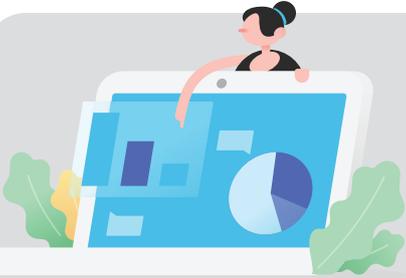
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1 Product Overview



The Catalytic Wallboard is a PC-friendly, lightweight, easy-to-install and cost-effective ACD wallboard for the Catalytic Call Centre solution.



What you see is what you get

The benefits of the Catalytic Wallboard are in plain sight. They include:

- The wallboard displays live statistics of a Catalytic Call Centre
- Multiple queues can be monitored on a single wallboard
- Up to 5 remote users can make a browser connection to the host PC

The stats speak for themselves

Statistics that inform and empower your Call Centre operations are available by the categories of both queue and agent



A room, with a view

Up to date statistics are critical, but not all call centre operations are carbon copies. Catalytic offers a range of wallboard layouts to display the key metrics that are most relevant to your particular environment and business.



2 Using this Guide

This quick reference guide will help you gain the most out of your Catalytic Call Centre Wallboard feature.

We'll cover basics to help you get started right away and we'll give you tips to leverage the range of features and benefits to your business advantage.

For further assistance contact email support@catalytic.co.za or call 087 945 0006

3 Installation

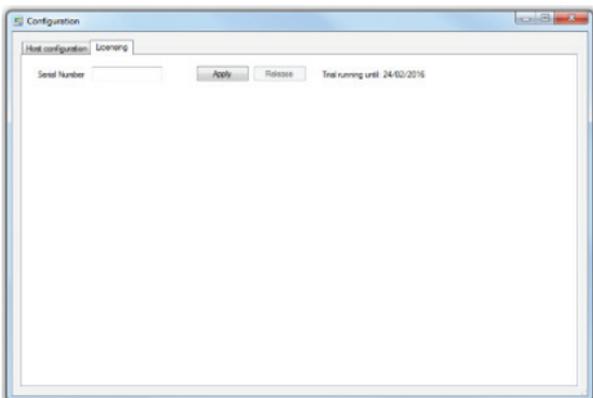
Go Wallboard is a software application providing visual representation of call information presented from the Catalytic Call Centre solution.

The Go Wallboard software is supplied as an Internet download. It is a self-contained installer that contains the files needed to install a copy of Go Wallboard. When you first run Go Wallboard, it takes you through an installation and configuration phase where you need to tell it your call centre server's address and your login credentials

Note: Please contact your service provider for the login credentials required to enter during the setup process.

4 Licensing

A license is required to use the product and is provided in the form of an eight digit serial number. To enter the serial number, please go to File -> Configuration and select the tab called 'Licensing'. Enter the serial number and click on 'Apply'.



Release license button:

If you have previously registered Go Wallboard and you want to move the software to another PC then you must release the software from the original machine. To do this, press the 'Release license' button and write down the code that you are given.

Before installing Go Wallboard on the new machine, you must make your service provider aware that you are moving the license. They will need the serial number and the release code you have been provided in order to release the license association with the old machine.

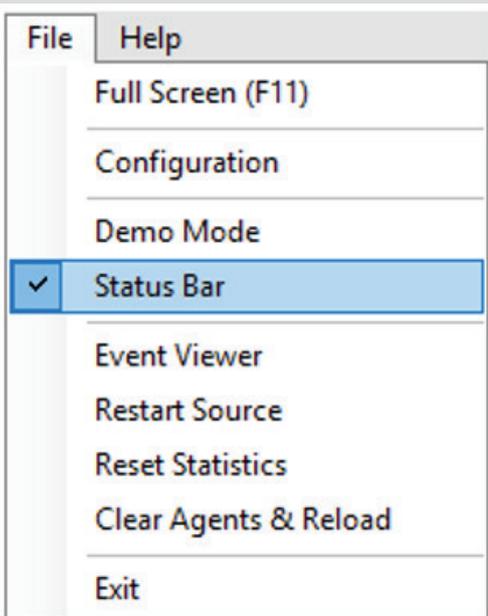
Note: A single license is bound to a single installation per PC. Please contact your service provider should you wish to install another instance of the wallboard on another PC



5

Main Menu

Once installed and opened the following menu is available:

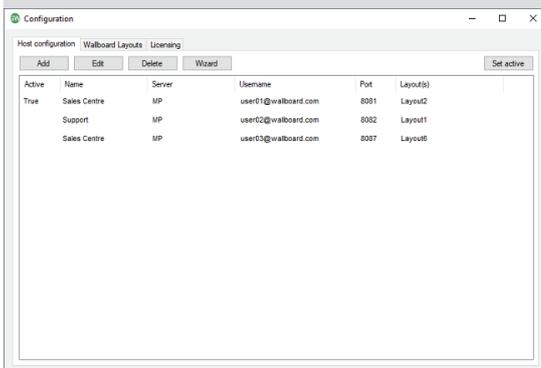


- **Full Screen (F11):** Hit 'F11' to go full-screen.
- **Configuration:** Select this to configure and change all settings.
- **Demo Mode:** Demonstrates how the software should behave when successfully connected to a call centre
- **Status Bar:** Show or hide status bar at the bottom of the window.
- **Event Viewer:** Check Event and Debug Logs.
- **Restart Source:** Restart Go Wallboard's connection to the XSP Server. Note: This does not reset statistics.
- **Reset Statistics:** Reset all reported statistics to zero. Note: All statistics are reset to zero at midnight automatically. Closing Go Wallboard does not reset statistics.
- **Clear Agents and Reload:** Clears and reloads all Call Centres and Agents. Statistics are reset to zero.
- **Exit:** Exit the software.

6

Configuration

Use this option to set up and configure a new wallboard host (view).



A "host" is the configuration associated with an individual wallboard view.

- **Add Host:** Click on this button to add a new host.
- **Edit Host:** Select a host and click on this button to edit its details.
- **Delete Host:** Select a host and click on this button to delete it.
- **Wizard:** Takes the user through the step by step configuration.
- **Set Active:** Activate (a selected host) connection and display view.
- **Host list window:** Displays a list of all available and configured hosts.



6A

Add a new wallboard Layout

Multiple wallboard views (hosts) can be configured and saved for future use.

The 'Add' dialog box has three tabs: Host Configuration, Thresholds, and Advanced. The Host Configuration tab is active. It contains the following fields:

- Name: Sales Centre
- Product: MP
- Username: user1@gowallboard.com
- Password: [Redacted]
- Layouts: Layout6 (with a 'Select' button)
- Layout Switch Interval: N/A (dropdown menu)
- Call Center Filtering: All Call Centers (with a 'Select' button)
- Web server port: 8082

Buttons at the bottom: Test Settings, Cancel, Save.

- **Name:** Your name for this Wallboard view.
- **Username:** BroadWorks Call Center Supervisor user name.
- **Password:** BroadWorks Call Center Supervisor password.
- **Layout:** Select preferred wallboard layout.

The 'Choose Layouts' dialog box shows a list of layouts on the left and a preview of the selected layout on the right. The preview shows a dashboard with four sections: Customer Services, Sales, Tech Support, and Accounts. Each section has a grid of metrics and charts.

Section	Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	Metric 6
Customer Services	1749	71	88.9%	2	Abandoned Calls	Agenda Available
Sales	1684	60	88.9%	4	Abandoned Calls	Agenda Available
Tech Support	1789	69	88.9%	2	Abandoned Calls	Agenda Available
Accounts	1787	75	88.9%	3	Abandoned Calls	Agenda Available

- **Layout Switch Interval:** Automated Layout Switching will rotate through selected Layouts at a defined interval.
- **Call Center Filtering:** By default, all call centre queues associated with the username will be displayed. Use this option to filter the queues displayed.

The 'Choose Call Centers' dialog box has a list of call centers with checkboxes. Two are checked: Promotions Hotline and Record Sales. A 'Save' button is at the bottom right.

- **Web Server Port:** Allows an end user to connect to the Wallboard via web browser e.g. 10.100.0.27:8082 where 10.100.0.27 would be the IP address of the client running the Wallboard in this instance.



6B Set Thresholds and SLA

The tile colour for selected call waiting, call count and SLA statistics will graduate between the selected colours as the thresholds is approached and reached.

The 'Add' dialog box has three tabs: Host Configuration, Thresholds, and Advanced. The 'Thresholds' tab is active. It contains the following sections:

- Colors:** Three color swatches (green, orange, red) are shown. Below them are input fields for 'Call Waiting Range (seconds)' (set to 30) and 'Call Count Range (calls)' (set to 10).
- SLA:** Four rows of SLA settings:
 - 'Less than or equal' with a value of 90 and a red color swatch.
 - 'Between' with values 90 and 95 and an orange color swatch.
 - 'Greater than' with a value of 95 and a green color swatch.
 - 'Call Answer Time (seconds)' with a value of 15.

Buttons at the bottom include 'Test Settings', 'Cancel', and 'Save'.

- **Colours:** A Set colour scheme for the configured thresholds (Call Waiting, Call Count and SLA) by clicking on the coloured boxes. When a threshold is crossed, an alert with corresponding "colour severity" will be displayed.
- **Call Waiting Range:** Set range for selected call waiting statistics.
- **Call Count Range:** Set range for selected call count statistics.
- **SLA:** The Call Answer Time and Service Level statistics will display if a call centres SLAs are being met.

6C Set Active

To open the wallboard, highlight the preferred Host and click 'Set Active'.

The 'Configuration' window has three tabs: Host configuration, Wallboard Layouts, and Licensing. The 'Host configuration' tab is active. It contains buttons for 'Add', 'Edit', 'Delete', 'Wizard', and 'Set active' (highlighted with a red box). Below the buttons is a table:

Active	Name	Server	Username	Port	Layout(s)
True	Sales Centre	MP	user01@wallboard.com	8081	Layout2

Note: Setting a new Host active will reset the Wallboard statistics.

6D Status Bar

The Status Bar is located at the bottom of the Go Wallboard Window and extends across the entire width of window. It is used to conveniently present different information and options. To enable the Status Bar, click on the File menu and then click 'Status Bar'.

The 'Go Wallboard for BroadWorks' window shows a status bar with the following data:

	Promotions Hotline	Record Sales
Average Talk Time	00:00	00:00
Agents Available	3	3
Callers(%)	0%	0%
Layout1	0	0
Layout2	0	0
Layout3	0	0
Layout4	0	0
Layout5	0	0
Layout6	0	0
Layout7	0	0
Layout8	0	0
Layout9	0	0
Empty	0	0
AllStats	0	0
Simple	0	0

On the left side of the status bar, there is a 'Layout selector' menu with options: Layout1, Layout2, Layout3, Layout4, Layout5, Layout6, Layout7, Layout8, Layout9, Empty, AllStats, Simple.

Layout selector

The Layout selector is located on the left hand side of the status bar and allows a user to easily switch between available layouts by simply clicking on the option and selecting the preferred layout.

Connection status

Connection status is located on the right hand side of the Status Bar and displays the connection status between Go Wallboard and the Catalytic platform.



6E

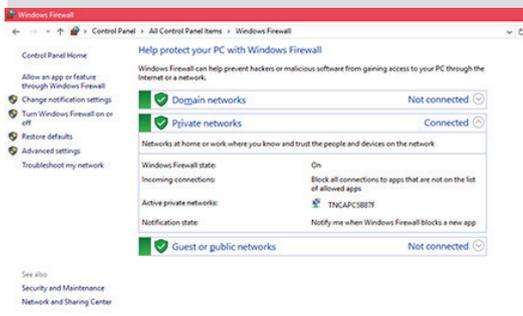
Browsing to the Wallboard

The Wallboard can also support up to five connections to it from a remote browser. This means the Wallboard view can be mirrored on other PCs, tablets or Smart TVs. To do this simply enter the IP address of the device running the Wallboard followed by ":8080 (where 8080 is the port assigned to the Wallboard Host) in the URL field of the remote browser.

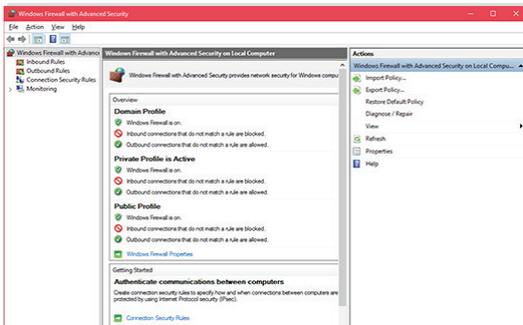
Note: port 8080 is the default port for this and can be changed in the Wallboard configuration. Check the Wallboard configuration to get this value. The PC local firewall rules may block access.

6F

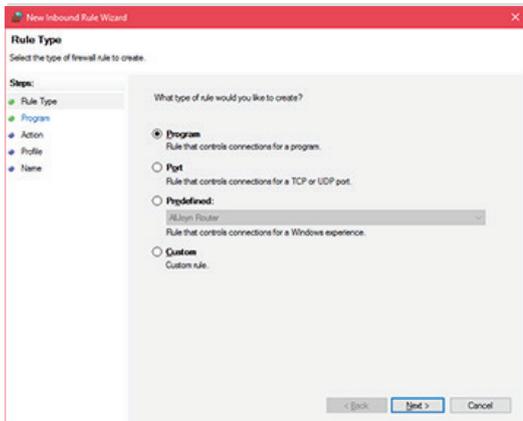
Modify firewall to allow remote browser connection



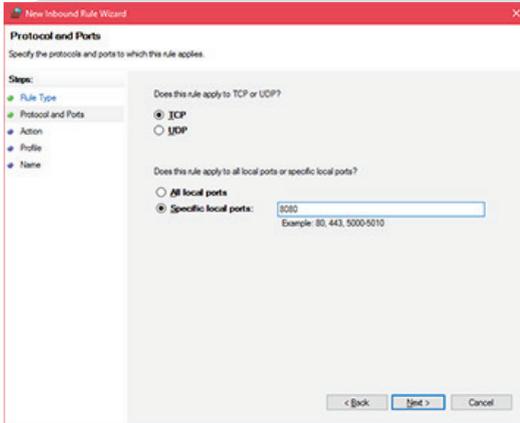
1. Go to Control panel / Windows Firewall.



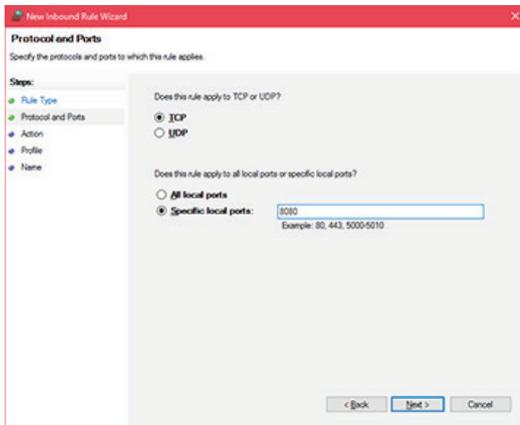
2. Select "Advanced settings".



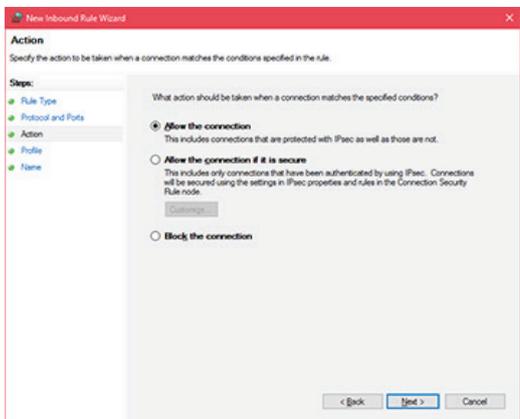
3. Select "Inbound rules" followed by "New Rule".



4. Select "Port" radio button and click "Next" and then type in the appropriate port number in "Specified local ports" field associated with Wallboard view (the default is port 8080 but check Wallboard configuration). Click "Next".



5. Select "Allow the connection" and click "Next".



6. Name the rule and finish.

Note: For External API usage the same steps as above should be undertaken with port 9000.



7 Custom Layouts

7A Layout Configuration

Choose a Template from the dropdown menu: Empty Template, Example Layouts (AllStats Layout, Example, Simple Layout) and System Layouts (these are the standard layouts shipped with the product).

The screenshot shows a dialog box titled 'Add' with a close button (X). It has two tabs: 'Layout Configuration' and 'Advanced'. The 'Name' field contains the text 'Test'. The 'HTML Template' field is a dropdown menu currently showing 'Empty Template'. At the bottom, there are 'Cancel' and 'Save' buttons.

- **Empty Template**
– A completely Blank template.
- **AllStats Layout**
– A template which includes all available stats.
- **Example**
– A simple template which includes some basic statistical elements but does not include any styling.
- **Simple Layout**
– A simple template which includes some basic statistical elements and styling.

Click Save to save the Layout

7B Edit Layout

Left-click on the Layout you wish to edit and then left-click the Edit button.
In the window which opens, click Edit again – this will open your default HTML editor.

This is an identical screenshot of the 'Add' dialog box as shown in section 7A, with 'Name' set to 'Test' and 'HTML Template' set to 'Empty Template'.

Note–Custom Templates are saved in C:\Users\[Username]\AppData\Local\MondagoWallboard\Cust omTemplates\ when performing a Save action the .html file in this location will be updated and the Layout will automatically refresh in Go Wallboard if it is the active Layout.

Important Note: If the Save As...action is used from within the editor, it is recommended that you save the .html file in a different location and then use the Import option to add the Layout to Go Wallboard.



7C

Import Layout

Left-click Import button.
Navigate to the location of the HTML file for the layout you wish to import and click Open.

7D

Delete Layout

Left-click on the Layout you wish to delete and then left-click Delete button.

Important Note: If the Save As...action is used from within the editor, it is recommended that you save the .html file in a different location and then use the Import option to add the Layout to Go Wallboard.

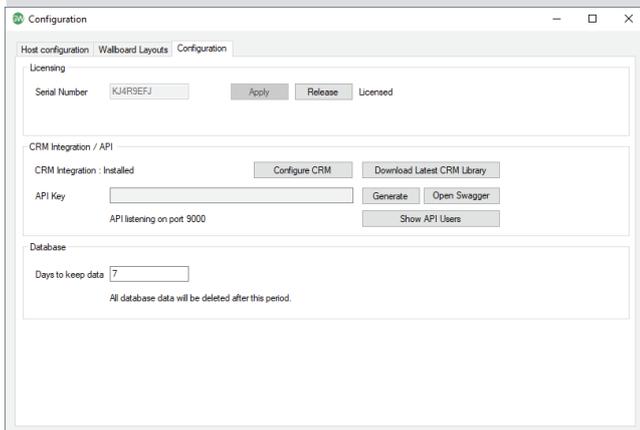
7E

Editing a Layout

Wallboard custom layouts use standard HTML and CSS, so anyone proficient in web design/development should be able to create a wallboard design or easily modify the sample templates to their needs.

8

Using the API to make new layouts



An API (application program interface) is available with Go Wallboard that enables third party applications to get access to the same statistics used by Go Wallboard. This is particularly for generation of more complex historical layouts or to embed call centre information into business applications such as service desk systems. The API is a standard rest API documented using Swagger making it friendly and easy to use by software developers.

To use the API go to File / Configuration / Configuration click on 'Generate' in the 'CRM integration / API' section and copy the API key generated. Then click on 'Open Swagger' and paste the API key into the 'api_key' field in swagger to start interrogating the data available through the API.

The API requires a license to operate and a single license is shipped with Go Wallboard as standard. A license is consumed by IP address. To release the license simply click on 'Show API Users' and then right click on the connection you want to release the license from and select 'Release'.



catalytic

it's the *connection* that matters



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