



OCEANCRM · PHONE SYSTEM

Owner and manager guide

Setting up and running the phone system and call centre

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1. How the phone system fits together

A customer calls one of your SIM numbers. The SIM sits in a GOIP box (a **line**), which passes the call to OceanCRM's phone switch. The switch follows your **Incoming calls** rule, usually to a **Call menu** ("press 1 for..."), then to a **Queue** where callers hear music until an agent who is Ready answers in the browser, on a desk phone, or in the Ocean Attendance app. Every call is written to the **Call log**, with its recording if you record.

Menu (Phone system)	What it is for
Extensions	One per person or phone. Give each staff member an extension.
Gateways	Your GOIP boxes and SIM lines; registration status; price per minute.
Incoming calls	Where calls on each line go, office hours, and where they go when closed.
Call menus	Recorded greetings and "press a key" choices.
Queues	Callers wait in line with music; agents answer in turn.
Ring groups	Several phones ring together, no waiting line.
Holidays	Poya days and closures.
Agent board	Who is Ready, on a call or on a break, right now.
Call log · Call backs · Call reviews	Every call, recordings, call-back requests, quality scores.
Call centre reports · Workforce planning · Costs and call quality	Figures, staffing and money.
Call centre settings	Recording, notifications, surveys, report e-mails, ticket times, AI.

2. Give your staff access

In **Settings** → **Staff / Users**, open a person and tick what they may do. Call centre access is split so you can give each person only what they need:

Tick box	Gives
Call centre — campaigns, call log, reports, costs	Running the call centre: campaigns and call lists, all calls, reports, costs, workforce.
Phone system: set up extensions, lines, menus, queues, settings	Changing the phone system. A wrong setting can stop calls, so give it to few people.
Call centre: live board, listen / whisper / join calls, score calls	Supervisors: the agent board, listening in, scoring calls, settling disputes.
Call centre: my call queue only	Agents: their own calls, call backs, knowledge base, their reviews.
Call centre: play call recordings	Listening to recordings. Every play is logged.
Call centre: download call recordings	Taking a copy of a recording. Every download is logged.

The **Manager** role has all of them; the **Call supervisor** role has supervising but not setting up.

Then in **Phone system → Extensions → New** give the person an extension number (for example 103) and choose **Used on: Browser** for the Phone window, or **Softphone or desk phone (SIP)** for a desk phone or the mobile app. **Login details** shows what to type into a desk phone.

3. Incoming calls, menus and queues

Queues

1. **Phone system → Queues → New queue.** Add the agents' extensions and their skill for this queue (Expert gets calls first, Backup only when others are busy).
2. Choose who gets the next call (longest idle, fewest calls, round robin, ring all...), ring time, rest after a call, the longest wait and where callers go then.
3. Callers hear music and their place in line. With **press 1 to be called back** on, their number goes on the Call backs list.
4. **VIP customers jump the line** and **Ring the customer's own agent first** use the customer record (VIP, language, own agent) — set them on the customer's page under **When they call**.
5. Give the queue a **Language** if you have separate Sinhala, Tamil and English teams; customers marked with a language go to their queue.

Call menus

1. **Phone system → Call menus.** Upload the **Greeting** (any audio file; a phone voice note is fine).
2. Add **Keys**: one key (0–9, *, #) or two keys (10–15, 01–09). Each sends the caller to a queue, extension, ring group, voicemail or another menu.
3. Set what happens when nobody presses a key, and whether callers hear music or ringing after choosing.

Incoming calls and holidays

- **Incoming calls:** for each line (or "Any line"), where calls go when open, office days and hours, and where they go when closed (for example a voicemail or a message).
- **Holidays:** on these dates the closed rule is used all day.

4. Call centre settings

Phone system → Call centre settings:

- **Recording:** none, incoming, outgoing or all; how many days to keep; tell callers "this call may be recorded".
- **Notifications:** missed-call bell; voicemail by e-mail; after-call SMS survey (rating 1–5, 0–10 and "how easy").
- **Quality and shifts:** calls picked at random for review each week; break minutes allowed per shift.
- **Costs:** monthly budget (alerts at 80% and 100%), price of an SMS and a paid WhatsApp message.
- **Report by e-mail:** the PDF report every morning or every Monday, to the addresses you enter.
- **Support tickets:** answer-within and fix-within minutes per priority; auto-assign new tickets.
- **AI helpers:** only with your own AI key (Business profile). Without it, everything else works normally.

5. Watching the call centre live

- **Agent board:** every agent's status and current call, queues waiting, today's figures, top agents and alerts (callers waiting with nobody free, long breaks, overdue tickets). It refreshes every 5 seconds.
- **Listen, Whisper** (only the agent hears you) or **Join:** your own extension rings, then you are in the call. Every use is logged.
- You can set an agent back to Ready or to Offline from the board.

6. Reports, reviews and planning

- **Call centre reports:** speed of answer, service level, calls abandoned, handle time, fixed-first-time, conversions, satisfaction (CSAT, NPS, ease), each agent's figures, and agents needed per hour. Download the calls as CSV or the report as PDF.
- **Call reviews:** score a call from the Call log (**Score**) with coaching; **Pick calls to review** chooses some at random. Agents can disagree; use **Settle** to keep or change the score.
- **Workforce planning:** calls expected per hour for the next 7 days and agents needed, against people on HR shifts (red = too few); people each shift should have; how good the forecast was; and schedule adherence (late, Ready time, breaks over, left early).
- **Costs and call quality:** costs by line, agent and campaign against your budget; call quality (MOS) per line and agent; line uptime.

7. Calling lists of customers

1. **Call centre** → **Campaigns** → **New**: name, what the agent says, calling hours, retries.
2. **How numbers are dialled**:
 - **Preview**: each agent's Phone window gets one number at a time (Auto dial).
 - **Power**: the switch rings several numbers per free agent and puts answered calls through to the campaign's queue.
 - **Predictive**: like Power, and it adjusts itself to keep dropped calls under your limit.

You can hang up on answering machines automatically and choose which line (caller ID) the campaign calls from.
3. In the campaign's **Call list**: **Paste numbers**, **Add customers / leads** or **Import**, and **Give to** a person. **Set priority** for hot leads.
4. The campaign's **Results** show reached, machines, dropped and converted.

8. Inbox, website chat and e-mail

- **CRM** → **Website chat** → **New**: title, greeting, colour; copy the one-line script into your website. Chats arrive in the Inbox. A matching knowledge-base article is offered to the visitor first.
- **CRM** → **E-mail inbox** → **New**: your support mailbox (Gmail works with an App Password). **Test** checks it. New mail arrives every minute; replies go from the same address in the same thread.
- Facebook Messenger messages arrive automatically when your Facebook page is connected.

9. Connecting other systems

- **Settings** → **API keys**: a key for your website or software; it is shown once. Instructions: `/developers` .
- **Settings** → **Webhooks**: OceanCRM tells your system when a call ends, a ticket opens, and so on.
- **Settings** → **CRM connections**: HubSpot, Zoho CRM, Salesforce, Zendesk with your own credentials.

10. Recordings and privacy

- Recordings are kept for the days you set, then deleted every night.
- Only people with the recording permissions can play or download them. **Pause recording** (or `*9`) while card numbers are read out.
- Customers who ask not to be called go on **Call centre** → **Do not call**; the dialler skips them.