



OCEANCRM · PHONE SYSTEM

Staff user guide

For agents and office staff who answer and make calls

Version 1.0 · October 2026 · English

1. What you will use

- **The Phone window** in OceanCRM: your telephone in the browser. You answer, call, transfer and write notes here.
- **The Inbox**: website chat, e-mail, Facebook Messenger and WhatsApp messages from customers, in one list.
- **The Ocean Attendance app** (Android), if your company gives you a phone extension on it.
- Your login is the same as for the rest of OceanCRM. What you can see depends on the permissions your manager gave you.

2. Starting your day

1. Log in to OceanCRM and click the  **Phone** button at the top. The Phone window opens. Keep it open in its own window all day.
2. The first time, the browser asks to use your **microphone**. Click **Allow**. If you see "The microphone is blocked", click the lock icon at the left of the address bar → **Microphone** → **Allow**, then reload the page.
3. Wear a headset. Use the **Echo test** to hear yourself and check the sound.
4. Set yourself to **Ready**. Only Ready people get calls from the queue.

Status	What it means
Ready	You take calls from the queue.
Break · Lunch · Meeting · Training	The queue skips you. Your time on each is counted for your supervisor.
Offline	You are not working.

On a desk phone you can also dial *45 for Ready and *46 for Break.

3. Answering a call

1. When a call comes, the Phone window rings and shows the number. If the caller is a customer or lead, their name and recent history appear.
2. Click **Answer** (or **Decline**).
3. During the call you can use:
 - **Mute** — the customer cannot hear you.
 - **Hold** — the customer hears music. Click **Resume** to come back.
 - **Keypad** — to press numbers into another company's menu.
 - **Pause recording** — while the customer gives a card number or a password. Click again to carry on recording.

- **End call.**

4. Transferring a call

Click **Transfer** and type an extension (for example 102), a ring group or an outside number.

- **Send** — a blind transfer. The call goes straight there and you are free.
- **Talk first** — a warm transfer. The customer waits on hold while you speak to your colleague. Then choose:
 - **Hand over** — the customer is connected to your colleague and you leave.
 - **All three** — you, the customer and your colleague talk together.
 - **Back to caller** — your colleague cannot help. You return to the customer.

A transfer to an outside number needs a free telephone line. If all SIM lines are busy, the transfer fails and the customer stays with you.

5. Notes and outcome after every call

The notes card stays open after the call. Please fill it every time — your reports and the company's follow-ups come from it.

1. Write what the customer wanted in **Notes**. Add each request with **Add**.
2. Choose the **outcome** (for example Interested, Call back, Not interested, Do not call).
3. For a call back, pick the date. It appears on your follow-up list.
4. Click **Done**.

6. Calling a list in your free time (Auto dial)

Your manager puts numbers on a **call list** and may give some of them to you.

1. In the Phone window, find **Auto dial** and choose the **Wait between calls** (for example 30 seconds).
2. Click **Start**. Your own numbers come first, then the shared ones. You see the name, the campaign and **What to say**.
3. The number rings. Talk, then fill the notes card and outcome.
4. After the wait, the next number rings by itself. A customer calling in pauses the auto dial.
5. Click **Stop** when you finish.

Numbers on the Do-not-call list, customers who asked not to be called, and calls outside the campaign's calling hours are skipped automatically. Numbers that did not answer are tried again later.

7. Call backs and missed calls

- A missed call rings the **bell** 📞 at the top of OceanCRM with a **Call back** button.
- Customers waiting in the queue can press **1** to be called back. These appear in **Phone system → Call backs**. Click **Call**, then mark **Reached** or **No answer**.
- Voicemails arrive in the bell and by e-mail (if your company turned it on). Dial ***97** to listen on a desk phone.

8. The Inbox — chat, e-mail, Messenger, WhatsApp

Open **CRM → Inbox**.

1. Choose **Mine**, **Unassigned** or **All** at the top, and the channel and status.
2. Click a conversation. The messages show in the middle; the customer's calls, tickets and other chats show on the right.
3. Type your reply and click **Send**. Use **Ready replies** for common answers. Tick **Internal note** to write something only colleagues see.
4. Use **Ticket** to open a support ticket, **Call** to phone the customer, **Close** when it is finished.
5. If your company turned on AI, ✨ **Suggest reply** writes a draft, and the translate buttons turn the customer's message into English or Sinhala, or your reply into Sinhala or Tamil. Always read a draft before sending.

A 🕒 next to a conversation means the first reply is late. Website chats should be answered within 5 minutes.

9. Support tickets

- **CRM → Support Tickets** shows tickets. **Assigned to me** filters your own.
- Each ticket has an **answer by** and a **fix by** time. If they pass, the ticket is moved up a priority and your supervisor is told.
- Add replies in **Replies / updates**. Tick **Internal note** for colleagues only.
- When fixed, set the status to **Resolved** and choose **How it ended**.

10. Knowledge base and call reviews

- **Phone system → Knowledge base**: search answers while the customer waits. Many articles have a ready reply you can copy.
- **Phone system → Call reviews**: your supervisor's scores and coaching for your calls. Click **Got it** to confirm, or **Disagree** to explain why the review is wrong. A supervisor will decide and tell you.

11. Desk phone and keypad codes

Dial	Does
*45 / *46	Ready / Break
101 , 102 ...	Call a colleague's extension
*8	Answer any phone ringing in your company
**101	Answer extension 101 when it rings
700	Park a call (during the call, transfer to 700 and hear the slot number)
701 – 720	Pick up a parked call from any phone
*700 – *799	Conference rooms
## + number	Blind transfer during a call
*2 + number	Warm transfer; *2 again hands over, *1 cancels, *3 all three
*9	Pause / resume the call recording
*97	Your voicemail
*43	Echo test

12. If something does not work

Problem	Try this
No sound or "microphone blocked"	Allow the microphone (section 2), check the headset is chosen as the microphone, reload.
I am Ready but no calls come	Keep the Phone window open (not closed or asleep). Ask your supervisor whether you are in the queue.
The phone rang but I did not hear it	Keep the Phone window in its own window, not a background tab; turn the computer sound on.
Calls out fail	The SIM lines may all be busy. Wait and try again, or tell your supervisor.