OfficeServ ACD — Agent User's Guide

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CHAPTER 1. Introduction

OfficeServ Agent is a call center agent of the ACD[™] V3.1.1 package that enables call center agents to operate the ACD[™] V3.1.1 system effectively and enables managing call center agents.

Agent provides all functions that can be performed by call center agents for operating the call center.

Purpose

This document introduces the OfficeServ ACD — Agent application and describes how to operate the Agent application

Document Content and Organization

This document contains nine chapters and an abbreviation.

Chapter 1. Introduction

This chapter introduces the Agent application.

Chapter 2. Installation

This chapter describes about Agent application installation.

Chapter 3. Agent

This chapter describes about Agent application.

Chapter 4. Basic Operations

This chapter describes about basic feature of Agent application.

Chapter 5. Call Operations

This chapter describes about basic call features.

Chapter 6. Split Operations

This chapter describes about split features.

Chapter 7. Favorite Operations

This chapter describes about Favorite features.

Chapter 8. Message Operations

This chapter describes about Message window features.

Chapter 9. Split Stats Operations

This chapter describes about split Statistics.

Chapter 10. Agent Stat Operations

This chapter describes about Agent Statistics.

ABBREVIATION

This chapter describes the frequently used acronyms.

Conventions

The following special paragraphs are used to point out information that should be read. This information may be set-off from the surrounding text, but is always preceded by a bold title in capital letters.



Console Screen Output

- The lined box with 'Courier New' font will be used to distinguish between the main content and console output screen text.
- **Bold Courier New**' font will indicate the value entered by the operator on the console screen.

References

Revision History

Edition No.	Date of Issue	Remarks
00	Jun 2008	Base document version 1.0

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ABBREVIATION 52

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CHAPTER 2. Installation

This chapter provides an overview of OfficeServ ACD Agent installation.

Prerequisites

Before installing the OfficeServ ACD Agent, check the following requirements.

Hardware Requirements

- **1.** Intel 2.4 CPU or above.
- *2.* Memory 1GB memory or above.
- **3.** Hard disk drive 24 GB free disk space.

Software Requirements

- **1.** Operating System
 - · Microsoft Windows 2003 Server/ Professional.
 - Microsoft Windows 2000 Server/ Professional.
 - The system should have the following installed configurations:
 - o Service pack 4 or above.
 - Microsoft Windows XP Professional.
 - The system should have the following installed configurations:
 - o Service pack 2 or above.
 - MS .NET framework 2.0

ACD Agent Installation

To install Agent

- *1.* Insert the CD provided into the CD-ROM drive.
- **2.** Run the self-extracting setup file **SETUP.EXE** from the CD-ROM.

NOTE	SELF-EXTRACTING If Autorun is enabled on the system, the installation starts automatically.



3. The Choose setup language screen is displayed. Select the Language and Click OK.



4. The OfficeServ ACD Agent Setup screen is displayed.



• If the Microsoft .NET framework is not installed then the below message is displayed



- Click OK and Dot Net framework 2.0 setup is launched.
- On successful installation the Setup Complete screen is displayed.

OR

• Otherwise the following error message is shown.



5. After going through the Welcome screen, click Next to continue.



6. The End User License screen is displayed. Read the license and click I accept... radio button and Next, and the installation continues.

OfficeServ ACD Agent - InstallShield Wizard	×
License Agreement Please read the following license agreement carefully.	
Software License Agreement & Limited Warranty For OfficeServ ACD Agent for OfficeServ Keyphone Series. Samsung Electronics Co., LTD. IMPORTANT, READ CAREFULLY: 	
< <u>B</u> ack <u>N</u> ext > Cancel	

7. The Agent Option screen is displayed.

- Enter the ACD Server IP address or DNS Name.
- Enter Agent ID and Agent Station. Click Next.

OfficeServ ACD Agent - InstallShield Wizard	
Agent Options	, and a
Please enter Agent options.	Contraction of the
ACD Server IP or DNS Name:	
	_
Agent ID:	
Agent Station:	
InstallShield	
< <u>B</u> ack <u>N</u> ext >	Cancel

- 8. The Select Setup Option screen is displayed to allow the agent to change the ACD server IP and station number regardless of security level
 - Select the Modifiable ACD Server IP and Station Number check box. Click Next.

OfficeServ ACD Agent - InstallShield Wizard
Select Setup Option Select the setup option Which best suites your needs
Check the checkbox to allow the agent to change ACD Server IP and station number regardless of security level.
Modifiable ACD Server IP and station number
InstallShield
< <u>B</u> ack <u>N</u> ext > Cancel

9. The Choose Destination Location screen allows the user to choose the directory for the software.

OfficeServ ACD Agent - InstallShield Wizard	×
Choose Destination Location Select folder where setup will install files.	
Setup will install OfficeServ ACD Agent in the following folder.	
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.	
Destination Folder C:\\Samsung Electronics\OfficeServ ACD\Agent\ Browse	
< <u>B</u> ack <u>Next</u> Cancel	

• To install in the default folder, click **Next**.

OR

• To install in a different folder, select the folder by clicking on **Browse...** Click **OK** in the **Choose Folder** window

10. The **Progress Bar** of the **OfficeServ ACD Agent Setup** is displayed.

OfficeServ ACD Agent - InstallShield Wizard
Setup Status
OfficeServ ACD Agent is configuring your new software installation.
C:\DOCUME~1\anuradha\LOCALS~1\Temp\dotnetfx.exe
InstallShield

11. Click **Finish**, to complete the installation of ACD in the **Setup Complete** screen.

OfficeServ ACD Agent - InstallShield Wizard						
SAMSUNG	InstallShield Wizard Complete					
	Setup has finished installing OfficeServ ACD Agent on your computer.					
Officer						
ACD Agent						
	< Back Finish Cancel					

CHAPTER 3. Agent

This section describes the Agent module which is used by an agent to control a call.

Starting up the Agent

To start the Agent,

1. From the Windows desktop, click Start and choose Programs » Samsung Electronics » OfficeServ ACD » Agent.

OR



2. Click ACD Agent Agent icon on the desktop.

3. The Agent application is displayed.

🔵 Offic	eServ ACD	Agent										E	
File	Agent	Control	Help										
	9)	3)	0	6			6	2	() ()	6	6		
Logged	d Out 00:0	0:00 Idle			1-No	Call	2-	No Call		DI	VD Au	ito Ansv	ver

4. The agent has to configure the Login settings like IP Address, Language and other parameters. Select File » Options » General tab to configure the Login settings.





6. On successful login, the agent information is displayed in the title bar of the agent application.



Agent Menu

The section presents the menu bar options. Detailed descriptions on menu bar operation will be following. The section describes the options available in ACD Agent.

The menus of the Agent are the following:



File Menu

The [File] menu allows the user to configure agent application settings.



Menu	Shortcut	Description
Option	Ctrl + Shift + O	This option allows the user to configure the agent application settings
Exit	Ctrl + Q	This option allows the user to close the Agent application.

View Menu

The **[View**] menu allows the user to view/hide the Split information, favorite, message ticker, split stat and agent stat windows

View Agent Cor		Agent Control	Call Control	Help		
~	Sp	olit Information W	indow			
~	Fa	avorites Window				
~	Me	essage Ticker Wir	ndow			
~	Split Stat Window					
~	Agent Stat Window					
	Always On Top					
	Caller Information Popup Ctrl+P					
-	_					

Menu	Shortcut	Description
Split Information Window		This option allows the user to hide/show the Split Information Window
Favorites Window		This option allows the user to hide/show the Favorite Window
Message Ticker Window		This option allows the user to hide/show the Message Ticker Window
Split Stat Window		This option allows the user to hide/show the Split Stat Window
Agent Stat Window		This option allows the user to hide/show the Agent Stat Window
Always on Top		This option allows to set/reset the agent application on top of other application

Caller Information	Ctrl + P	This option allows to show/hide the Caller
pop-up		Information for an incoming call

Agent Control Menu

The [**Agent Control**] menu allows the user to connect to the server, change the password, set break and toggle between wrap-up.

Agent Control Call Control	Н
Logout	
<u>S</u> et Break	
<u>T</u> oggle Wrapup	
<u>C</u> hange Password	ł

Menu	Shortcut	Description
Login /Logout		This option allows the user to connect/disconnect from the ACD Server
Set Break		This option allows the user set his status to a particular Break type for only one time.
Toggle Wrap up		This option allows the user to toggle between Extend Wrap-up and End Wrap up.
Change Password		This option allows the user to change the current password

Call Control Menu

The [Call Control] menu allows the user to perform call related operations.

<u>C</u> a	all Control <u>H</u> elp		
	<u>D</u> ial	Ctrl+M	
	<u>A</u> nswer	Ctrl+R	
	D <u>i</u> sconnect	Ctrl+Shift+D	
	<u>R</u> edial	Alt+R	
	<u>H</u> old		
	<u>T</u> ransfer		
	<u>C</u> onference		
	D <u>o</u> Not Disturb		
	A <u>u</u> to Answer		

Menu	Shortcut	Description
Dial	Ctrl + M	This option allows the user to make a call

Answer	Ctrl + r	This option allows the user to answer an incoming call
Disconnect	Ctrl + Shift + D	This option allows the user to disconnect a ongoing call
Redial	Alt + R	This option allows the user to redial the previous dialed number
Hold		This option allows the user to place a call on hold and retrieve a held call.
Transfer		This option allows the user to transfer the call to the other split/agent/phone number
Conference		This option allows the user to setup a 3- party conference by adding another caller to an ongoing call
Do not Disturb		This option allows the user to activate or deactivate the DND function
Auto Answer		This option allows the user to activate or deactivate the Auto Answer function

Help Menu

The [Help] menu presents the version and copyright information.

<u>H</u> elp]			
A	bout	ACD	Agent	
		10 2110	12-1	17-1

Menu	Shortcut	Description
Help		This option displays the ACD Agent
		version and copyright information.



	Extend/End wrap up
	Record
	Supervisor
6	Dial
	Answer
	Disconnect
6	Hold/Retrieve
6	Transfer
	Conference

CHAPTER 4. Basic Operation

This section describes some of the basic features of Agent application.

Options

The **[Options]** menu allows to Configure the environment settings for a agent, set/release split and Agent stat items to be monitored, set the agent hot keys and log/Language settings.

General

The [Options] menu allows to set the entire environment for a Agent.

1. Select **File** » **Options** on **Agent Application**. Select **General** tab.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select File » Option. Select General tab
- **3.** The General dialog box is displayed.

By default, General tab is displayed.

General Screen P Server Setup	op Split Stats Agent Stats Hotkeys Set the IP address or DNS name of the OfficeServ ACD Server 107.108.208.	Debug CIM
Interface Langua	age Choose a language for ACD Agent English	
Agent Options	Set agent preferences Default Break Type:	8 - User2
Agent ID : A2002	Delay before Auto Answer (in seconds):	1
Extension: 2002	No Answer Action:	Set Agent To Bre 🝷
	<u>o</u> k	

- **4.** Server Setup Enter Server IP or DNS Name.
- 5. Select the language to change the **Interface** to a different language.
- **6.** Set Agent Preferences

NOTE	Agent Preference Agent should have permission to set preferences for Agent ID, Extension, Delay before Auto Answer and No Answer Action. For more information, see Agent Permissions in Supervisor manual.
	While installing, in Select Setup option screen, the Modifiable ACD Server and Station Number checkbox must be checked in order to change Extension and Server IP. For more information, See Step 8 in Installation Chapter.

- Agent ID Enter the agent login ID (Max. 8 characters).
- Extension Enter the Device number (Max. 8 digits). The items are used to log in by an agent.
- **Break Type** Select the default break type to be applied, when the agent click

in Call Control Toolbar.

- **Delay before Auto Answer** Enter the number of seconds, for the call to wait before it is answered automatically
- No Answer Action Select the action to be taken, when the agent is not answering the incoming ACD call.

7. Click **OK** to Save and Exit the **Option** dialog box.

Screen Pop

The **[Screen Pop]** tab allows the user to select the items to be displayed when a customer call is received

1. Select File » Options on Agent Application. Select Screen Pop tab.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select File » Option. Select Screen Pop tab.
- *3.* The Screen Pop dialog box is displayed.
- **4.** Select the pop-up window settings to be displayed.

OfficeServ ACD Agent System Options General Screen Pop Split Stats Call Settings Determine how inform calls	Agent Stats Hotkeys Debug CIM
Popup Window Settings Image: Screen Pop on Incoming Call Image: Bring up Agent on Incoming Call Image: Play Sound on Incoming Call Image: Always on Top	Choose Fields To Display Caller Information Image: Incoming Split Image: Transferring Split Image: DID Number Image: DID Name Image: Caller ID
Select Ring Sound	Call Type Customer Level

- 5. Select the ringing tone to be played by clicking on the **Browse** button.
- **6.** Caller Information Select the parameters to be displayed in the Caller Information dialog box.
- 7. Click **OK** to save and exit the **Option** dialog box.

Split Stat

The [Split Stat] tab allows selecting the split parameter item to be monitored



Agent Stat

The [Agent Stat] tab allows selecting the agent parameter item to be monitored.



Hot Keys

The **[Hot Keys]** tab allows the user to assign a keyboard shortcut to access functions in menus and sub-menus.

1. Select Configuration » Options on Agent Application. Select Hot Keys tab.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select File » Option. Select Hot Keys tab.
- *3.* The **Hot Keys** dialog box is displayed.

OfficeServ ACD Agent Sy	stem Options	X			
General Screen Pop Assign Hotkeys	Split Stats Agent Stats Hotkeys Debug CIM				
Action Hide Agent Interface Open Options Window Make Call Answer Call Disconnect Call Toggle Hold Transfer Call	Hotke Hotkey Settings Ctrl+Sr Ctrl+M Ctrl+R Ctrl+Sr Ctrl+Sr Ctrl+H Ctrl+H				
<u> O</u> K					

4. To Assign:

- Select the action from the list to assign the Hot Key.
- In Hot Key settings, enter the key sequence, and then click Assign



5. To Un-assign:

- Select the action from the list to un-assign the Hot Key.
- Click Delete.

6. Click OK to save & exit the Option dialog box.

Debug

The **[Debug]** tab allows the user to set Log option.

1. Select **File** » **Options**. on **Agent Application**. Select **Debug** tab.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select File » Option. Select Debug tab.
- *3.* The **Debug** dialog box is displayed.

😔 OfficeServ ACD A	gent System Options	X		
General Scre	en Pop Split Stats Agent Stats Hotkeys Debug CIM			
Log Level	Set the detail level of debug logs. Note that higher detail means more disk storage 3 v			
Log Folder	Choose the folder to store debug log files D:\Hari\log\log1 Browse			
Delete Logs	Delete log files. Log files are also automatically deleted 30 days after creation			
<u>©</u> K				

- **4.** Log Level Set the Priority from the dropdown list.
- 5. Select the location to save log file, by clicking on **Browse** (...) button .
- *6.* Click **Delete** button to delete the log files.



7. Click **OK** to save & exit the **Option** dialog box.

CIM

The **[CIM]** tab allows the user to integrate the Agent software with the CIM (Customer Information Management) software for contact management.

NOTE CIM This tab is enabled only if 'Use Phonebook' option is enabled in the ACD license.
--

1. Select **File** » **Options**. on **Agent Application**. Select **CIM** tab.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select File » Option. Select CIM tab.
- *3.* The **CIM Settings** dialog box is displayed.

OfficeServ ACD Agent Sys	item Options		X
General Screen Pop	Split Stats Age	nt Stats Hotkeys	Debug CIM
CIM Settings			
2	Select CIM :	None	•
	GoldMine Settings		
	ID :		
	Password :		
	lni :		<u>Browse</u>
	Exe :		Browse
	Ģ	<u>o</u> k	

- *4.* **Select CIM** Select the CIM software from the dropdown list.
 - If Select CIM is Outlook, for more information, see MS Outlook section
 - If Select CIM is GoldMine, Enter the following details in GoldMine Settings:
 - **ID** Enter the Goldmine user ID
 - Password Enter the GoldMine Password
 - **Ini** Enter the GM.ini file under **GoldMine** Installation folder or select the path by clicking on the **Browse** button (GM.ini).
 - o Exe Enter the GoldMine exe file under GoldMine Installation folder or

select the path by clicking on the **Browse** button.

- For more information, see <u>GoldMine</u> section
- If Select CIM is ACT, for more information, see <u>ACT</u> section.
- 5. Enter the corresponding information for the selected CIM.
- **6.** Click **OK** to save and exit the **Option** dialog box.

MS Outlook

This section describes how to use the **Microsoft Outlook**TM with the Agent.

- **1.** From the Windows desktop, click Start and choose Programs » Microsoft Office » Microsoft Office Outlook.
- *2.* The **Microsoft Outlook** is displayed.

💵 Ethan Green Hawke	- Contact					
Elle Edit View Insert Format Iools Actions Help						
i 🛃 Save and Close 🛃 🛃 🔘 🤻 🤣 🐼 🗸 🔺 🔹 🔹 🖕 🎝						
General Details	Activities Certificates All Fields					
Full <u>N</u> ame	Ethan Green Hawke		E-mail 💌	ethan1020@samsung.com		
<u>]</u> ob title:	Actor	0	Displa <u>v</u> as:	Ethan Green Hawke (ethan1020@samsung.com)		
Company:	Dangsa		Web page address:	http://www.ethanhawke.com		
File as:	Hawke, Ethan Green		IM address <u>:</u>			
Phone numbers			-			
Business 🔻	2019			-		
Home 🔻	2021					
Business Fax 🔻	2061					
Mobile 🔻	2284					
Addresses						
Business 🔻	1150 Kelly Johnson Bird.					
This is the mailing add <u>r</u> ess						
				-		
		Categories		Private		

 NOTE
 CIM

 The Select CIM field is Outlook in CIM tab of Option menu. For more information, see CIM section.

3. Launch OfficeServ ACD Agent application and login to agent.



4. Incoming Call — On arrival of new call, the Caller Information is displayed in Outlook.

- 5. Outgoing Call The agent can make a new call from Outlook.
 - The toolbar is displayed, if Outlook is successfully integrated with Agent.



OR

- To view the Toolbar, follow the steps below
 - o Click Tools » Options » Others » Advanced Option » COM Add-Ins button.
 - Click Add button and select OutlookAddin.dll under CMT program file folder.
 - Run the **Outlook** and select **Contacts** tab. See **1** in the below figure
 - Select the phone number to dial. See **3** in the below figure.
 - The customer name is displayed in the toolbox. If click the field, the customer's phone number is displayed. See 2 in the below figure.

📴 Contacts - Microsoft Outlook								
Elle Edit View Go Iools Actions Help						help 👻		
Sensew + 🗃 📭 🗙 Y 💌 🔕 + 😰 Find 🕕 Type a contact to find 🛛 + 🔞								
2021 3 • H	2021 3 Hawke, Ethan Green + N X							
Contracto	3 2	2021	3	_	_			
	2	2019		Company	File 0 c (Rucipers Phone	Rucipose Env	
	- 2	284		Company		Dusiness Priorie	Dusiness rax	
			iere t					
Current View		Flag Statu	us: Unflagged (5 items)					
Address Cards	8=		John Depp	Dangsa	Depp, John	2023		
	8		Ethan Green Hawke	Dangsa	Hawke, Ethan Green	2019	2061	20
	8=		Jeon JiAh	Samsung	JiAh, Jeon	2021		
O By Company	8=		Angelina Jolie	Dangsa	Jolie, Angelina	2022		
O By Location	8=		Seol Seekyoung	Samsung	Seekyoung, Seol	2020		
By Follow-up Flag								
Open Shared Contacts								
Customize Current View								
Mail								
🛄 Calendar								
8 Contacts								
ず Tasks								
. 🕞 🕅 »								
S Items /								

- Select the number and click N button to dial. At the same time, the Agent displays "Outgoing" with dialed number.
- To disconnect the call, press 🗱 button.
- To leave the call record in the Outlook, press 💷 button.

GoldMine

This section describes how to use the GoldMine with the Agent.

1. From the **Windows** desktop, click **Start** and choose **Programs** » **GoldMine**.

2. The **GoldMine** is displayed.



3. Launch OfficeServ ACD Agent application and login to agent.



- **4.** Incoming Call On arrival of new call, the Caller Information is displayed in GoldMine
 - The **Caller ID Notification** dialog box is displayed with basic Caller Information.

Caller ID Notification	
Contact: Jiah Jeon Company: samsung Location: New York, NY 10000	<u>Open</u>
Phone: 2021	<u>I</u> gnore
Message: Incoming Call	



Caller Information

Caller Id notification dialog box is displayed only if the Caller Data is saved.


• Click **Open** or **Goto** button. The **Caller Information** is displayed

- 5. Outgoing Call The agent can make a new call from GoldMine.
 - Select **Contact** » **Dial Phone** » **Dial Phone 1** to Make a Call to the number in the **Phone 1** section.

👼 GoldMine 6.5 - [Jiah Je	eon]				
🎢 <u>F</u> ile <u>E</u> dit <u>V</u> iew ∣	<u>L</u> ookup	Contact Schedule	<u>C</u> omplete <u>T</u> ool:	s <u>W</u> indow <u>H</u> elp		_ 8 ×
🔍 🤉 🔹	6	<u>D</u> ial Phone	Þ	🥔 Dial Phone <u>1</u>	Alt+1	
New Find Note	Caler	🕍 Insert a Note	Ctrl+l	🍠 Dial Phone <u>2</u>	Alt+2	p
X		Write	•	3 Dial Phone <u>3</u>	Alt+3	
Getting Started	83	Create E-mail		🞯 Dial <u>F</u> ax	Alt+4	Phone1: 2021 Ext: Work
				훯 <u>R</u> edial the Last Number	r	Phone2: 01199280759 Ext: Home Phone3: 0312799883 Ext: Office
		Take a <u>P</u> hone M	essage	🐼 Manual Dial		FAX: 0312799884 Ext: FAX
GoldMine Support		😢 Add a Detail		A Incoming Call		E-mail: 2022@samsung.ncom
Onnine		📾 Link a File		Bly Johnson Blvd.		web site, http://www.sansung.com
Ja		Assign a Proces	3			Contact Type:
Quile L Okard Without		🔩 Launch Web Site		rk		Industry: Software Publishing Interest: Truck
QUICKStart Wizard			State: NY	Zip: 10000		Acent Mngr: J. Smith
			Country: South	Korea Merge:		Open: Black
Preferences			Summary Fields	GM+View Notes Conta	acts 🔪 Deta	ails Referrals Pending History
			Comments:			Last Contact: 07/04/06 3:03pm
1			Prev Result:			Last Attempt: 07/04/10 1:04pm
Toolbars			Next Step: Visi	t FrontHange Solution's Home pag	ge	Last Update: 07/04/09 USEB
			Next Action:	Appointment:		Creation: 07/03/29 USER
			Call Back:	Forecast:		Record: 3 of 3
Dial Phone1				Num 01:	:08:57 Use	er 2007년 4월 10일 화요일 14:12

• The number is dialed.

ACT

This section describes how to use the **ACT**TM with the Agent.

1. From the Windows desktop, click Start and choose Programs » ACT.

2. The ACT is displayed.

M section.
Ν

🞯 ACT! 7 Premiu	m for Workgroups - A	ACT_TEST		
; <u>F</u> ile <u>E</u> dit <u>V</u> iew	<u>L</u> ookup <u>C</u> ontacts <u>G</u> ro	oups <u>S</u> chedule Wr <u>i</u> te <u>R</u> eports <u>T</u> ools	<u>H</u> elp	
I4 4 2 of 5	🕨 📦 🚺 Contacts)Contact List 🔒 📑 🤯 🚳 👘 🏌	🖥 🍽 🎽 🛃 🛃 🚳	🕀 🏟 🤉 🗦 🗙
💿 Back 💿	Contact Detail			View Groups/Companies
	Company	samsung)	Address	
Contacts	Contact	Jiah Jeon		
	Salutation	Jiah		
Groups	Title	Account Manager	✓ City	Auckland
	Department	Administration	✓ State	NT
Companies	Phone	[82] 2021 Ext	Postcode	
	Mobile	(82) 0119 9280759	. Country	×
Calendar	Fax	(82) 0312 979883		
(VE)	ID/Status		🗸 Web Site	www.samsung.com
Task List	Referred By		🖌 E-mail	ja02.jeon@partnet.samsung.com
Ŕ				
Opportunity List				

3. Launch OfficeServ ACD Agent application and login to agent.



4. Incoming Call — On arrival of new call, the Caller Information is displayed in ACT.



6. **Outgoing Call** — The agent can make a new call from ACT.

- Click in **Phone** field to highlight the number.
- Press Jutton in toolbar. At the same time, Agent displays "Outgoing" with dialed number

🛞 ACT! 7 Premiu	m for Workgroup	s - ACT_TEST				
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ii ii 1 of 4	🕨 🙀 🚺 Contact	s 👰 Contact List 📔 🖟	🤌 🔿 🐁	🖆 窗 🛤 🕻	🛓 🛃 🕞 🧐 🖉 🖨 🧯	2 🚽 🗙
💿 Back 💿	Contact De	etail		Vie	w Groups/Companies,	Make cal
	Company	samsung		Address		^
Contacts	Contact	Jiah Jeon				
	Salutation	Jiah				
	Title	Administrator	*	City	Wellington	~
Groups	Department	Engineering	*	State	VIC 🗸	
<u>m</u>	Phone	[82] 2021 Ext		Postcode		
Companies	Mobile	8201199280759		Country	Korea, Republic of	~
	Fax	(82) 0312 979883				
Calendar	ID/Status	Contractor	*	Web Site	www.samsung.com	
(j=	Referred By	Friend	*	E-mail	ja02.jeon@partnet.samsung.com	
<u>S</u> E						
Task List 👤						
Layout 🗸						×

• To disconnect the call, press 🗱 button.

Login

The **[Log In]** menu allows the user to gain access to the ACD Server and to be recognized as a current user.



1. Click Agent Control » Log In on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Agent Control » Log In.

OR

3. On Call Control Toolbar, click



- **4.** The Agent Login dialog box is displayed.
 - **Password** Enter the Password.
 - Click Login to login to ACD Server.
 - On successful log-in, agent status changes to Break status.

⊖ Agent Login	X
Agent Settings	
Extension: 2005	
Agent ID: A0001	
Password:]
	-
Login Scancel	J

5. For Split Login



•

Split Permissions

Agent should have "Split Login" permission for split login. For more information, see **Agent Permissions** in **Supervisor** manual.

- On Call Control Toolbar, click
- The Splits for Login dialog box is displayed.

⊖ Select Splits for Login	X
Agent Settings	
Extension: 2005	
Agent ID: A0001]
Password:]
Available Splits ✓ Default Split ✓ Split A ☐ Split B ☐ Split C	
🔋 Login 🕼 Cancel	

- **Password** Enter the password.
- Available Splits Select the splits the agent wants to login.
- Click Login button. The Agent is logged in to the selected splits.

6. On Call Control Toolbar, click *(intersection)*, to change to **Available** Status.

Logout

The [Log Out] menu allows the user to log out of ACD Server.

1. Click Agent Control » Log Out on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (²²) icon in the Notification Area of task bar and select Agent Control » Log Out.

OR

3. On Call Control Toolbar, click



- **4.** A confirmation message "**Are you sure you want to Logout**" is displayed.
- 5. Click Yes to log out of the ACD Server.



Always on Top

The [Always on Top] menu allows the user to set the agent application on top of other application.

1. Select View » Always on Top on Agent Application.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select View » Always on Top.
- *3.* The Agent application will be on the top level of other applications.

Caller Information Popup

The [**Caller Information Popup**] menu allows the user to show/hide the Caller Information pop-up for an incoming call.

- **1.** On receiving of inbound call, the **Caller Information** dialog box is displayed.
- 2. To show/hide the Caller Information window while the incoming call is going on,
 - Select View » Caller Information pop-up on Agent Application.

 Right click on the OfficeServ ACD Agent (^(Q)) icon in the Notification Area of task bar and select View » Caller Information pop-up.

Basic Call Information	с.	Customer Data	2004
DID Name:		Customer ID:	
DID Number:	3501	Customer Level:	
Call Type:	ACD Inbound	Completion Code:	
Call For:	Default Split	minor1	^
Arrived to me:	2:32:19 PM	Minor2	
Answered by me: 2:32:22 PM		minor3	
		- minor4	*
Call Notes			
			1



Caller Information

You can select the parameter item to be displayed in the Caller Information. For more information, see **File >Options >Screen pop** tab.

3. The **Caller Information** dialog box will not close, if a complete code is assigned to the agent, by the supervisor in **Supervior** application, then once the call is disconnected the agent has to select the completion code and enter the call notes.

4. Click **Save** button to save the call details and close the dialog box.

NOTE	Caller Information Pop-up For save button to be enabled, Agent should have Assign Completion Code permission. For more information, see Supervisor manual.
	For cancel button to be enabled, Agent should have Cancel Completion Code permission. For more information, see Agent Permissions in Supervisor manual

Change Password

The [Change Password] menu allows the agent to change the existing login password.

1. Select Agent Control » Password on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (^(Q)) icon in the Notification Area of task bar and select Agent Control » Password.

Θ	Change Login Password	X
	Password Setup Old Password:	
	New Password:	
	🖹 <u>S</u> ave 💌 <u>C</u> ancel)

- **3.** The Change Password screen is displayed.
- *4.* **Old Password** Enter the existing password.
- **5.** New Password Enter the new password.
- **6.** Confirm New Password Enter the new password again to confirm.
- 7. Click Save to change the password. A message, "Password Changed" is displayed.

Exit

- The [Exit] menu allows you to exit the Agent application.
- **1.** Click File » Exit on Agent Application.

- 2. Right click on the OfficeServ ACD Agent (²²) icon in the Notification Area of task bar and select File » Exit.
- **3.** The Agent Application is closed.

About ACD Agent ...

- **1.** Click **Help** » **About ACD Application**.
- *2.* The **OfficeServ ACD Agent** version and copyright information is displayed.



CHAPTER 5. Call Operation

This section describes the basics call operations:

Dial

The [Dial] option allows the user to make a call to an extension or external number.

1. Select Call Control » Dial on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (²²) icon in the Notification Area of task bar and select Call Control » Dial

OR

3. On Call Control Toolbar, click

4. The Make a Call dialog box is displayed.

⊖ Make a Call 🛛
Choose a destination Enter a number to call, or choose a destination from the box below. Call Destination: 2004 Split/Agent/Favorite Selection Agent List Favorites a1 Agent 2 Agent 3 Agent 4
💿 <u>D</u> ial 💌 <u>C</u> ancel

5. Enter the phone number or by select the number in Split/Agent/Favorite section.

6. Click **Dial** button and the specified extension will be dialed.

Answer

The [Answer] option allows the user to answer a call.

1. Once an inbound call is ringing, the **Caller Information** dialog box is displayed

Caller InformationI
If Screen pop on incoming call is selected in Options → Screen pop tab.

2. Select Call Control » Answer on Agent Application.

OR

3. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Answer.

OR

4. On Call Control Toolbar, click

OR

- 5. Click Answer button on the Caller Information dialog box to answer the call.
- 6. The status changes to **Busy** in status bar.

Disconnect

- The [Disconnect] option allows the user to disconnect an ongoing call.
- 1. Select Call Control » Disconnect on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Disconnect.

OR

3. On Call Control Toolbar, click

- **4.** Click **Disconnect** button on the **Caller Information** dialog box to disconnect the call.
- **5.** The call will be disconnected. In case of another call **On Hold** when a call is disconnected, the held call will be automatically retrieved.

Redial

The [Redial] option allows the user to redial the previous dialled number.

 NOTE
 Redial

 In case, no number is present to redial, then Make a Call dialog box is displayed

1. Select Call Control » Redial on Agent Application.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Redial
- *3.* The call is made to the previously dialled number. If previous dialled number does not exist then **Make a Call** dialog box is displayed.



Hold

The [Hold] option allows the user to place a call on hold or retreieve the hold call.

- *1.* Select the call in **Call Status Bar**.
- 2. On Call Control Toolbar, click 💯
- *3.* The CallStatus of the call changes to On Hold.



Transfer to Agent

The [**Transfer**] option allows the user to transfer an ongoing call to another agent or phone number.

1. When a call is in progress. Select **Call Control** » **Tranfer** on **Agent Application**.

OR

2. Right click on the OfficeServ ACD Agent (22) icon in the Notification Area of task bar and select Call Control » Transfer

3. On Call Control Toolbar, click

1	-	-	L.		
ъ			0	i.	
R	C	2		L	
1	c		1		

NOTE Trans This fe	er ture is enabled only if a single call is in progress
	⊖ Transfer Call 🗵
	Choose a destination Enter a number to transfer to, or choose a destination from the box below. Split / Agent / Favorite Selection Agent List Split List A0 Default Division P0000 Default Group S0000 Default Split S0001 Split A S0002 Split B S0003 Split C Transfer Destination
	💿 <u>T</u> ransfer 💌 <u>C</u> ancel

- 4. The Transfer Call dialog box is displayed.
- **5.** Enter the phone number or by selecting the number in **Split/Agent/Favorite** section and Click **Transfer** button. The ongoing callstatus changes to **Hold** and a consult call is made to the selected agent.(Transfer Initialize)
- 6. Once the consult call status is Busy, again select Call Control » Tranfer, or On Call

Control Toolbar, click , the call is transferred.(Transfer Complete)

7. The Agent status changes to Idle.

Transfer to Split

The [Transfer] option allows the user to transfer an ACD Call to a split.

NOTE Transfer

NO split list is displayed for Non-ACD Calls.

1. When an inbound call is displayed. Select Call Control » Tranfer on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (⁽²⁾) icon in the Notification Area of task bar and select Call Control » Transfer

OR

3. On Call Control Toolbar, click

⊖ Transfer Call 🛛
Choose a destination Enter a number to transfer to, or choose a destination from the box below.
Split / Agent / Favorite Selection Agent List AD Default Division AD Default Division Product Group Source Selection AD Default Split Source Selection AD Default Division Source Selection AD Default Division Source Selection AD Default Division Source Selection AD Default Division Source Selection AD Default Split Source Selection AD Default Split AD
Transfer Destination
<u> </u>

- 4. The Transfer Call dialog box is displayed.
- 5. Select the Split from in Split/Agent/Favorite section.
- 6. Click **Transfer** button, the call is transferred to the selected split.

Transfer
This feature is enabled only if a single call is in progress

Conference

The [**Conference**] menu allows the agent to set up a three-party conference by adding another party to an ongoing call.

1. When an call is under progress, select **Call Control** » **Conference** on **Agent Application**.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Conference

OR

- **3.** On Call Control Toolbar, click
- **4.** The **Create Conference** dialog box is displayed.

😔 Create Conference	X
Choose a destination Enter a number to call, or choose a destination from the box below. Split / Agent / Favorite Selection Agent List Favorites a1 Agent 2	
Agent 3 Agent 4	
Conference Party: 2008	
😟 <u>C</u> onference 🔅 <u>C</u> ancel)

- **5.** Enter the phone number or by selecting the number in **Agent List/Favorite** section and click **Conference** button. The ongoing callstatus changes to **Hold**.(Conference Initialize)
- 6. Once the Consult call is connected (Busy), again select Call Control » Conference, or On

Call Control Toolbar, click , the agents will be connected to the conference.(Conference Complete)



Do Not Disturb (DND)

The [Do Not Disturb] menu allows to activate or deactivate the DND function.

1. Select Call Control » Do Not Disturb on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Do Not Disturb

OR

- **3.** Double click on **Do Not Disturb** in status bar to activate the feature.
- 4. The DND will be activated and highlighted in the status bar.

Auto Answer

The [Auto Answer] menu allows to activate or deactivate the Auto Answer function.

1. Select Call Control » Auto Answer on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Auto Answer

- **3.** Double click on **Auto Answer** in status bar to activate/deactivate the feature.
- **4.** If the agent does not answer within the auto answer delay period, then the inbound call will be answered automatically.

Auto Answer
Auto Answer delay period is configured in Options →General

Supervisor

The [Supervisor] option allows the agent to dial the Supervisor extension.

	NOT
	•

Supervisor Extension

The option is disabled if Supervisor number is not configured in Supervisor application. For more information, see **System Options** in **Supervisor** manual.

- 1. Click on Call Control Toolbar.
- 2. A call will be made to the Supervisor extension
- *3.* In case of ongoing call, it will be put on hold and a consult call is made to the supervisor number.



Supervisor Extension

The Supervisor's extention specified in the **System Options** page of the **ACD Supervisor** is dialled.

End Wrap-Up

The [End Wrap-Up] option allows the agent to set his status to Available from Wrap-up status.

1. When the agent status is Wrap-up. Select **Agent Control** » **Toggle Wrapup** on **Agent Application**.

OR

2. Right click on the OfficeServ ACD Agent (22) icon in the Notification Area of task bar and select Agent Control » Toggle Wrapup

- 3. Call Control Toolbar, click
- **4.** Select **End Wrap-up** from the pop-up menu.
- 5. The agent status changes to Idle from Wrap-up status.

Extend Wrap-Up

The [Extend Wrap-Up] option allows the agent to extend his Wrap-up status

NOTE	Extent Wrap-up Agent must have Extend Wrap-up permission for this menu to be enabled. For more information,
-	see Agent Permissions in Supervisor manual.

1. When the agent status is Wrap-up. Select **Agent Control** » **Toggle Wrapup** on **Agent Application**.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Toggle Wrap up

OR



- **4.** Right Click and select **Extend Wrap-up** from the pop-up menu.
- 5. The agent Wrap-up time is extended.



Extended Wrap-up

To end the extended wrap-up status, click on Toggle Wrap-Up menu again.

Break

The [Break] option allows the agent to set his status to Break or from Break to Available





2. The agent status changes to **Break**.

Break Type

NOTE

The break type is received from the server when agent logs in. Break types can be set by the Supervisor. For more information, see File \rightarrow Option \rightarrow General \rightarrow Default Break Type option.

Set Break

The [Set Break] option allows the agent to set his status to a particular Break for only one time.

1. Click Agent Control » Set Break Wrapup on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select Call Control » Set Break

OR



4. The **Specify Break Type** dialog box is displayed.

⊖ Specify Break Type 🛛 🛛)
Choose a Break Type	
3 - Rest Break	
	-
♀ <u>S</u> elect ♀ <u>C</u> ancel	

- 5. Select the Break type from the dropdown list.
- **6.** Click **Select.** The agent status changes to **Break**

Recording

The [Recording] option allows recording the conversation between the Agent and the Caller through Call recorder application.

- 1. When call is under progress. on Call Control Toolbar, click
- 2. A message, "Call Recording has started" is displayed.

Recording

NOTE

The recording icon is disabled for that call once recording starts successfully.

3. Once the recording starts succesfully, it is automatically stopped when the call is disconnected.

CHAPTER 6. Split Operations

This section describes the Split bar operations:



4. List of split is displayed, to which logged in agent belongs.



Split Log-in

The [Split Log -in] option allows the agent to log in to the selected split.

NOTE Split Log-in

Agent should have "Split Login" permission for this option to be enabled. For more information, see **Agent Permissions** in **Supervisor** manual.

- *1.* The Agent status should be in **Break**.
- 2. Select the Split to log-in. The corresponding **Split** details is displayed.
- 3. Right click and select Log-in on My Status field.
- **4.** On successful login, the split status will change to **logged-in**.

Split Log-out

The [Split Log -out] option allows the agent to log out of the selected split.

NOTE Split Log-out

Agent should have "Split Login" permission for this option to be enabled. For more information, see **Agent Permissions** in **Supervisor** manual.

- *1.* The Agent status should be in **Break**.
- *2.* Select the Split to log-out. The corresponding Split details is displayed.
- 3. Right click and select Log-out on My Status field.
- **4.** The agent is logged out of the split.

Split Priority

The [Priority] option allows the agent to set the priority for the selected Split.

NOTE

Split Priority

Agent should have "Split Login" permission for this option to be enabled. For more information, see **Agent Permissions** in **Supervisor** manual.

- *1.* The Agent status should be in **Break**.
- 2. Select the Split and the corresponding Split details is displayed.
- *3.* Right click and select **Priority Level** on **Priority** field.



Supervisor will assign priority level to Agent in Assign Agent Splits in Supervisor application.

Cancel

The [Cancel] option allows closing the split pop-up menu.

- *1.* Select **Cancel** from the pop-up in the **Split Information Window**.
- *2.* The Pop-up menu is closed.

CHAPTER 7. Favorite Operations

This section describes the Favorite bar operations:

Favorite Bar

The [Favorite Window] menu shows or hides the Favorite window.

1. Select View » Favorite Window on Agent Application.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select View » Favorite Window
- **3.** The **Favorite Window** is displayed.



Agent

Add Agent

- The [Add] option allows adding an agent to the favorite list.
- **1.** Right click on the **Add New** icon and select **Add Agent** from the pop-up in the **Favorite Window**.
- *2.* The **Add Agent Shortcut** dialog box is displayed.
- *3.* Select the agent from the **Select Agent** section.
- **4.** The corresponding **Agent ID** and **Agent Name** is displayed. The agent can change the **Agent Name** if required.
- 5. Click Save to add the agent to the favorite list.

😔 Add Agent Shortcut	X
Favorite Setup	
Select Agent	
- Agent List	
Agent 2 Agent 3	
Agent 4	
Agent ID:	1
Agent Name:	
🖹 Save 🗵 🖾 Cancel	

Modify Agent

The [Edit] option allows editing selected agent information.

- **1.** Right click on the Favorite Agent and select **Edit Favorite** from the pop-up in the **Favorite Window**.
- *2.* The Edit Agent Shortcut dialog box is displayed.

😔 Edit Agent Shortcut	X
Favorite Setup	
Select Agent	
Agent List	
Agent 3	
Agent 4	
Agent 2 (Logged Out)	
Agent ID: A0002 Agent Name: Agent 2	
Save Scancel	_

- **3.** Enter the required changes
- *4.* Click **Save** to update the agent information.

Delete Agent

The [Delete] option allows to delete the selected agent

- 1. Right click on the logged on Agent and select **Remove Favorite** from the pop-up in the **Favorite Window**.
- *2.* The agent is removed from the list.

Split

Add Split

The [Add] option allows adding a split to the favorite list.

- 1. Right click on the Add New icon and select Add Split from the pop-up in the Favorite Window.
- *2.* The Add Call Center Split Shortcut dialog box is displayed.

😔 Add Call Center Split Shortcut	×
Favorite Setup	
Select Split	
A0 Default Division 	
Split ID:	
Save Scancel	-

- *3.* Select the Split from the **Select Split** section.
- **4.** The corresponding **Split ID** and **Split Name** is displayed. The agent can change the **Split Name** if required.
- 5. Click Save to add the split to the favorite list.

Modify Split

The [Edit] option allows editing select split information.

- **1.** Right click on the Favorite split and select **Edit Favorite** from the pop-up in the **Favorite Window**.
- *2.* The Edit Call Center Split Shortcut dialog box is displayed.
- *3.* Enter the required changes

⊖ Edit Call Center Split Shortcut 🛛 🗵
Favorite Setup
Select Split
Split List AO Default Division AO Default Division SO000 Default Group SO001 Split A SO002 Split B SO003 Split C A1 Marketing Division
Split ID: S0001 Split Name: Split A
Save Scancel

4. Click Save to update the split information.

Delete Split

The [Delete] option allows to delete the selected split

- **1.** Right click on the logged on split and select **Remove Favorite** from the pop-up in the **Favorite Window**.
- *2.* The split is removed from the list.

Phone Number

Add Phone Number

The [Add] option allows adding a phone number to the favorite list.

1. Right click on the Add New icon and select Add Phone Number from the pop-up in the Favorite Window.

⊖ Add Phone Number Shortcut	X
Favorite Setup Number to Dial: 2004 Label Name: ext1	
Save Scancel	

2. The Add Phone Number Shortcut dialog box is displayed.

- *3.* Number to Dial Enter the Phone number.
- 4. Label Name Enter the name to identify with the number.
- 5. Click Save to add the phone number to the favorite list.

Modify Phone Number

The [Edit] option allows editing selected phone number information.

- **1.** Right click on the favorite phone number and select **Edit Favorite** from the pop-up in the **Favorite Window**.
- *2.* The Edit Phone Number Shortcut dialog box is displayed.

⊖ E	dit Phone Num	ber Shortcut	X
	Favorite Setup - Number to Dial: Label Name:	2004 ext1	
	🗎 <u>S</u> ave	e (<u>Eancel</u>	_

- **3.** Enter the required changes
- 4. Click Save to update the agent information.

Delete Phone Number

The [Delete] option allows to delete the selected phone number

- **1.** Right click on the logged on label name and select **Remove Favorite** from the pop-up in the **Favorite Window**.
- *2.* The phone number is removed from the list.

Sort

Auto Arrange

The [Auto Arrange] option allows arranging the favorite icons to the left side of the screen.

- **1.** Right click and select **Auto Arrange** from the pop-up in the **Favorite Window**.
- *2.* The Favorite list will be arranged to the left side of the screen.

Sort by Name

The [Sort by Name] option allows arranging the favorite icons in an alphabetical order

- **1.** Right click and select **Sort by Name** from the pop-up in the **Favorite Window**.
- *2.* The Favorite list will be arranged in the alphabetical order.

Sort by Usage

The [Sort by Usage] option allows arranging the favorite icons according to the usage since the log on.

- *1.* Right click and select **Sort by Name** from the pop-up in the **Favorite Window**.
- 2. The Favorite list will be arranged in the order of usage

Sort by Type

The [**Sort by Type**] option allows arranging the favorite icons in the order of type. For example, if there are many agents on favorite window, these will be arranged next to each other, followed by phone number and split.

- *1.* Right click and select **Sort by Type** from the pop-up in the **Favorite Window**.
- *2.* The Favorite list will be arranged in the order of type.

Cancel

The [Cancel] option allows closing the Favorite pop-up menu.

- **1.** Select **Cancel** from the pop-up in the **Favorite Window**.
- *2.* The Pop-up menu is closed.

Close Favorite Window

The [Close Favorite Window] option allows closing the Favorite window.

- **1.** Right click and select **Close Favorite Window** from the pop-up in the **Favorite Window**.
- *2.* The favorite window is closed

Call Favorite

The [**Call Favorite**] option will make a call to the selected agent/phone number (not available for favorite split)

- **1.** Select a Agent/Phone number from the favorite list to call.
- *2.* Right click and select **Call Favorite** from the pop-up in the **Favorite Window**.
- **3.** The extension of the selected Agent/Phone number will be dialled.

Transfer to Favorite

The [**Transfer to Favorite**] option allows transferring an ongoing call to the selected agent/split/phone number

- *1.* Select a Agent/Split/Phone number to transfer.
- 2. Right click and select Transfer to Favorite from the pop-up in the Favorite Window.
- *3.* The call will be transferred to the selected Agent/split/Phone number.

	NOTE	

Transfer

For more information, see Transfer to Agent & Transfer to Split option.

Conference Favorite

The [**Conference Favorite**] option to set up a conference to the selected agent/phone number (not available for favorite split)

- *1.* Select a Agent/Phone number to conference.
- 2. Right click and select Conference Favorite from the pop-up in the Favorite Window.
- *3.* The Conference call will be setup for the selected Agent/Phone number



Conference

For more information, see <u>Conference</u> option.

Add Favorite

The [Add Favorite] option allows adding an agent/split/phone number to the favorite window.

- *1.* Select a Agent/split/Phone number to call.
- 2. Right click and select Add Favorite » Add Agent/Add Split/Add Phone Number from the pop-up in the Favorite Window.



For more information, see Add Agent & Add Split & Add Phone Number option.

CHAPTER 8. Message Operations

This section describes the Message bar operations:

Message Bar

The [Message Ticker] menu shows or hides the Message Ticker window.

1. Select View » Message Ticker Window on Agent Application.

OR

- 2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select View » Message Ticker Window.
- **3.** The **Message Ticker Window** is displayed.



4. When agent receives a message from Supervisor or Wallboard, the message is displayed as a hovering text and the message((icon on the left corner of the message bar is)





For more information, see View Message, Abandoned List and Callback List option.

5. When agent is assigned a new abandoned/callback request via Supervisor, the

) icon on the right corner is highlighted and the Abandoned/Callback(Abandoned/Callback count is updated.

NOTE

Abondoned/Callback

For more information, see Abandoned List/Callback List option.

View Message

The [View] option allows the agent to view the entire message received after the log-in.



1. Click () on Message Ticker Window.

2. The **View Agent Message** dialog box is displayed.

Θ	View /	Agent Message	25	X
[Mess	age List		
		Date Rec.	Message Text	
		6/6 3:16 PM	Hello!!!!!2	
		6/6 3:15 PM	Hello!!!!!	
		•		
				- 1
			💌 <u>D</u> elete	
			<u>ок</u>	

- *3.* List of previous message is shown with time stamp.
- **4.** Click**OK** to close the dialog box.

Delete Message

The [Delete] option allows deleting the selected message

- *1.* Click () on Message Ticker Window.
- *2.* The **View Agent Message** dialog box is displayed.
- *3.* Select the message from the list by clicking on the check box.
- 4. Click Delete button, a message, "Are you sure you want to delete(message number) the messages?" is displayed. Click OK to delete the message.
- **5.** Click **OK** to close the dialog box.

Abandoned List

The [Abandoned list] option allows viewing the list of abandoned calls.

- *1.* Click (**IIII**) on **Message Ticker Window**.
- 2. The Abandoned Call/Callback Request Log dialog box is displayed.
- *3.* Select Abandoned Call tab. By default this tab is displayed.
- **4.** Select the call from the list
- **5.** Click **Dia**l to make a call.
- OR
- **6.** Click **Close Call** button to close the abandoned calls.

\varTheta Ab	an	doned Call / Calli	oack Requ	iest Log		X
	Ab	andoned Calls	Callback	Request	8	
		Date Rec.	Cust ID		Cust #	
	Γ	6/11 3:18 PM			2004	
	Γ	6/11 3:18 PM			2004	
			al	Ŗ	<u>C</u> lose Call	
			Ģ	<u>о</u> к		

7. Click **OK** to close the dialog box.

Callback List

The [Callback list] option allows viewing the list of callback.

- *1.* Click (**III**) on **Message Ticker Window**.
- 2. The Abandoned Call/Callback Request Log dialog box is displayed.
- **3.** Select Callback Request Log tab.

\varTheta Aba	indoned Call / Call	back Req	uest Log	X
Æ	Abandoned Calls	Callba	ck Requests	
	Date Rec.	Cust ID	Callback #	
	6/6 3:18 PM		2011	
	6/6 3:18 PM		2011	1
	🖉 <u>D</u> i	al	<u>Close Call</u>	
		(p	<u>о</u> к	

- **4.** Select the call from the list.
- **5.** Click **Dia**l to make a call.
- OR
- 6. Click Close Call button to close the Callback call.
- 7. Click **OK** to close the dialog box.

CHAPTER 9. Split Stat Operations

This section describes the Split Statistics operations:

Split Stat Window

The [Split Stat] menu shows or hides the Split Stat window.

1. Select View » Split Stat Window on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select View » Split Stat Window.

3. The Split Stat Window is displayed.

ACD IN	AGTREQ	TX2PHONE	СВК	ANS	ABD
2	2	0	0	0	2
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
	ACD IN 2 0 0 0	ACDIN AGTREQ 2 2 0 0 0 0 0 0 0 0	ACD IN AGT REQ TX2PHONE 2 2 0 0 0 0 0 0 0 0 0 0 0 0 0	ACD IN AGT REQ TX2PHONE CBK 2 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ACD IN AGT REQ TX2PHONE CBK ANS 2 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

4. The selected Split Stat items and corresponding values for each split to which the agent belongs and is currently logged in is displayed.



Split Stat Settings

The [Split Stat] option allows selecting the split parameter item to be monitored

1. Select File » Option on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (22) icon in the Notification Area of task bar and select File » Option

3. The **OfficeServ ACD Agent System Options** dialog box is displayed.

4. Click Split Stats tab. The Split Stats screen is displayed.

OfficeServ ACD Agent Sy	stem Options						
General Screen Pop Split Statistics ACD In Total	Split Stats Agent Stats Hotkeys Debug CIM Choose which stats will be displayed in the Split Stat window (Max. 7 Items) Abandoned Items						
Account rotal Abandoned Agent Request Answered Trsf Tx2Phone Image: Callback Callback Image: Callback Answered Image: Callback Registered Agent Image: Callback Logged In Agent Image: Callback Idle Agent Image: Callback Busy Agent Image: Callback Wrap-up Agent Image: Callback Break Agent Image: Callback							
	Θ						

- 5. It shows a list of 27 split parameters and only 7 parameters can be displayed at a time.
- **6.** To register a split parameter
 - Select the split parameter from the list
 - Click **Add** > button to add the parameter.
- 7. To remove Split parameter:
 - Select the split parameter
 - Click **Remove** < button to remove the parameter
- OR
- Click **Remove All** << button to remove all the selected parameter
- *8.* Click **UP/Down** button to arrange the **Split** parameters.
- **9.** Click **OK** to close the dialog box.

Split Parameters

Category	Description
ACD In Total	Total number of inbound calls connected to ACD
Agent Requests	Total number of inbound ACD calls requested to the agent

Trsf to phone	Total number of inbound ACD calls transferred to phone
Callback	Total number of inbound re-requested ACD calls
Answered	Total number of inbound answered calls
Abandoned	Total number of inbound abandoned calls
Answered Transfers	Total number of inbound Split transfer answered calls
Abandoned Transfers	Total number of inbound Split transfer abandoned calls
Overflow In	Total number of unhandled inbound calls by ACD due to waiting queue overflow
Overflow Out	Total number of unhandled outbound calls by ACD due to waiting queue overflow
Registered Agents	Total Number of agents registered in the Split
Logged-in Agents	Total Number of agents logged in
Idle Agents	Total Number of agents with available status
Busy Agents	Total Number of agents with busy status
Wrap-Up Agents	Total Number of agents with Wrap-Up status
Break Agents	Total Number of agents with Break status
Break Type Information [1-8]	Total Number of agents with similar Break Types
Wait Calls	Number of waiting calls
Longest Wait Time	Longest waiting time
Average Wait Time	Average waiting time
Answer Ratio	Response ratio
Service Level	Service level

Modify Split Stat Title

The [Edit Split Title] option allows assigning a short name for the split parameter to be displayed in the split stat window.

- *1.* Double click on the **Split Name** parameter.
- *2.* The **Set Split Stat Short Name** dialog box is displayed.

😔 Set Split Stat Short Name	X
CACD In Total	_ [
ACD IN1	
	_
🗎 <u>S</u> ave	_

- *3.* Enter a new name
- 4. Click Save to update the Split Stat Window with the new title.

CHAPTER 10. Agent Stat Operations

This section describes the Agent Statistics operations:

Agent Stat Window

The [Agent Stat] menu shows or hides the Agent Stat window.

1. Select View » Agent Stat Window on Agent Application.

OR

2. Right click on the OfficeServ ACD Agent (2) icon in the Notification Area of task bar and select View » Agent Stat Window.

3. The Agent Stat Window is displayed.

TRSFIN	TRSFOUT	ACD IN	ACD IN AVG	NACD IN	NACD IN	NACD OUT
0	0	00:00:00	00:00:00	1	00:00:49	0

4. The selected Agent Stat items and corresponding values to which the agent belongs and is currently logged in is displayed.



Agent Stat Settings

The [Agent Stat] option allows selecting the Agent parameter item to be monitored

1. Select File » Option on Agent Application.

- 2. Right click on the OfficeServ ACD Agent (22) icon in the Notification Area of task bar and select File » Option
- *3.* The OfficeServ ACD Agent System Options dialog box is displayed.
- *4.* Click **Agent Stats** tab. The **Agent Stats** screen is displayed.

😔 OfficeServ ACD Agent Sy	stem Options	X
General Screen Pop Agent Statistics ACD In Answered ACD In Unanswered ACD In Avg Talk Time Non-ACD In Calls Talk Time Idle Time Wrap-up Time Break Time Average Talk Time Average Wrap-up Time	Split Stats Agent Stats Hotkeys Debug CIM Choose which stats will be displayed in the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Image: Comparison of the Agent Stat Window (Max. 8 Items) Imagent Stat Window (Max. 8 Items) <t< th=""><th></th></t<>	
	<u>()</u>	

- 5. It shows a list of 16 agent parameters and only 8 parameters can be displayed at a time.
- **6.** To register a agent parameter
 - Select the agent parameter from the list
 - Click **Add** > button to add the parameter.
- 7. To remove agent parameter:
 - Select the agent parameter
 - Click **Remove** < button to remove the parameter

OR

- Click **Remove All <<** button to remove all the selected parameter
- *8.* Click **UP/Down** button to arrange the **Agent** parameters.
- **9.** Click **OK** to close the dialog box.

Agent Parameters

Category	Description		
ACD In Answered	Total Number of inbound ACD calls answered		
ACD In Unanswered	Total Number of inbound ACD calls not answered		
Transferred In	Number of calls transferred to the agent		
Transferred Out	Number of calls which the agent transferred to other agent		
ACD In Talk Time	Total talk time		
ACD In Avg Talk Time	Average Talk Time taken to answer the ACD calls		
-----------------------------	---		
Non ACD In Calls	Total Number of inbound Non ACD calls		
Non ACD In Talk Time	Answered Time through Non-ACD		
Non ACD Out Calls	Total Number of outbound Non ACD calls		
Non ACD Out Talk Time	Answered Time through Non-ACD		
Current status Elapsed Time	Current Status duration time		
Talk Time	Total Talk Time		
Idle Time	Available Status		
Wrap-up Time	Total Wrap-up time		
Break Time	Total break time		
Average Talk Time	Average talk time		
Average Wrap-up Time	Average Wrap-up time		

Modify Agent Stat Title

The [Edit Agent Title] option allows assigning a short name for the agent parameter to be displayed in the agent stat window.

- **1.** Double click on the **Agent Name** parameter.
- *2.* The **Set Agent Stat Short Name** dialog box is displayed.

😔 Set Agent Stat Short Name	X
Transfer-In	_
TRSFIN	
🗎 <u>S</u> ave	

- *3.* Enter a new name
- 4. Click Save to update the Agent Stat Window with the new title.

	NOTE
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Agent Permissions

For more information, see Agent Permissions in Supervisor manual.

ABBREVIATION

Α		
C	ACD	Automatic Call Distribution
6		
	CIM	Customer Interaction Management
	CLI	Calling Line Identification
D		
	DID	Dialed Number Identification
	DND	Do Not Disturb

OfficeServ ACD Agent User's Guide

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