

OfficeServ ACD — Agent User's Guide

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This manual should be read before the installation and operation, and the operator should correctly install and operate the product by using this manual.

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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.

	<p>NOTE Indicates additional information as a reference.</p>
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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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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:
 - Service pack 4 or above.
 - Microsoft - Windows XP Professional.
 - The system should have the following installed configurations:
 - 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.

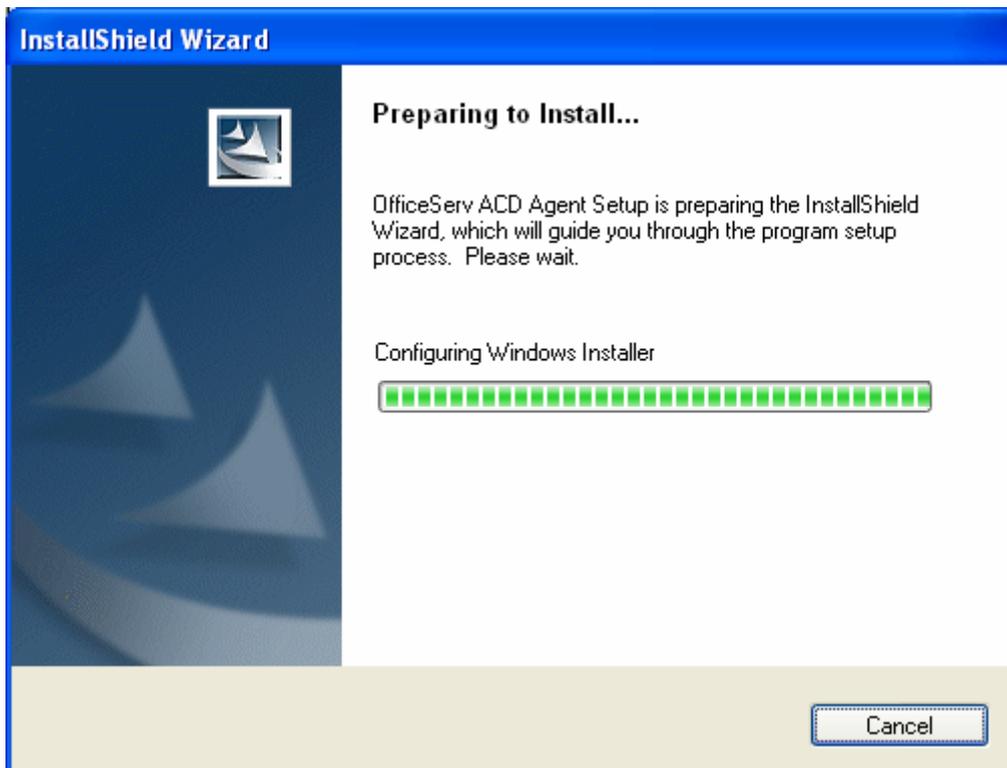
 **NOTE** **SELF-EXTRACTING**
If Autorun is enabled on the system, the installation starts automatically.

 **NOTE** **Update**
If an older version of Agent is already installed, setup will perform an update.

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



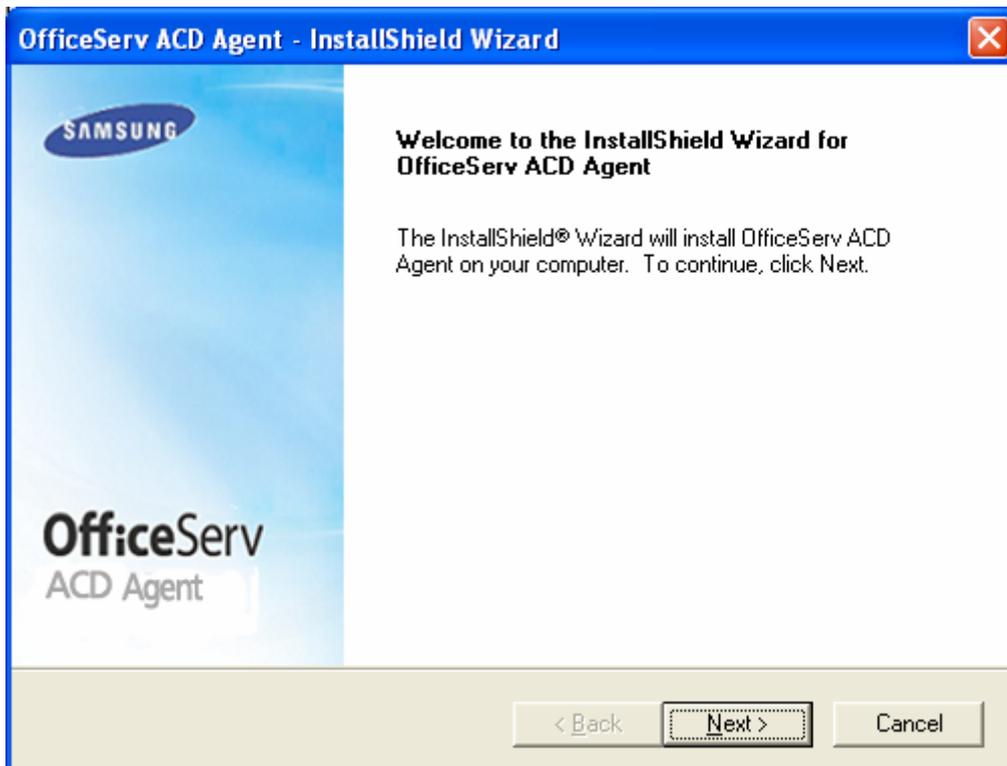
- Click **OK** and **Dot Net framework 2.0 setup** is launched.
- On successful installation the **Setup Complete** screen is displayed.

OR

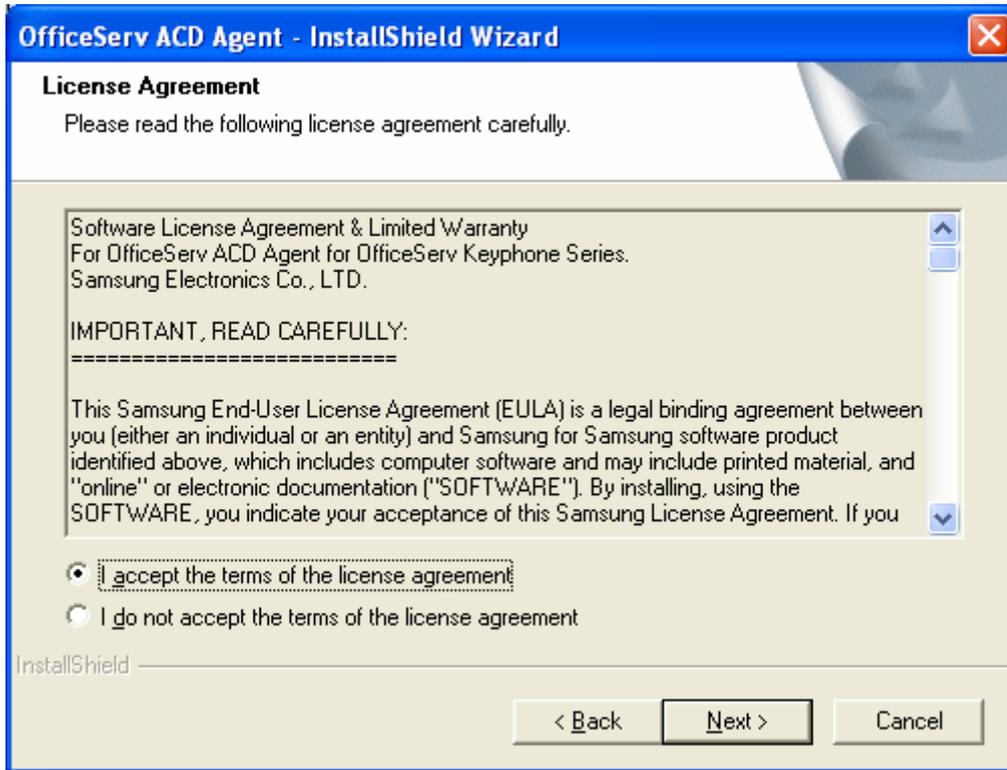
- Otherwise the following error message is shown.



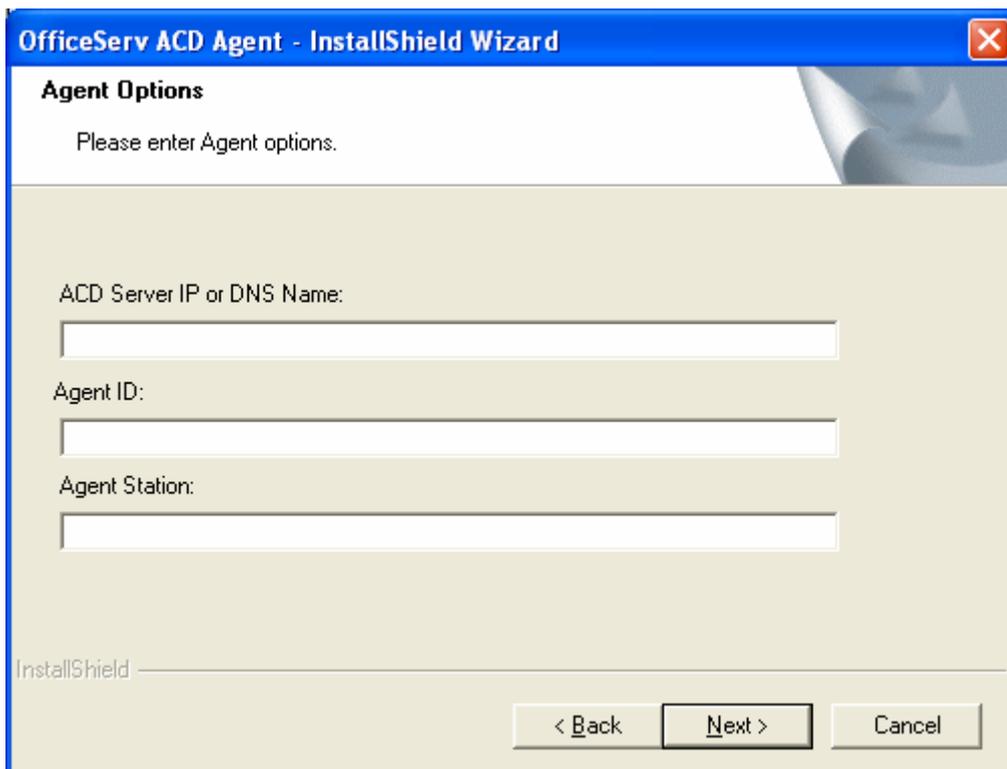
5. After going through the **Welcome** screen, click **Next** to continue.



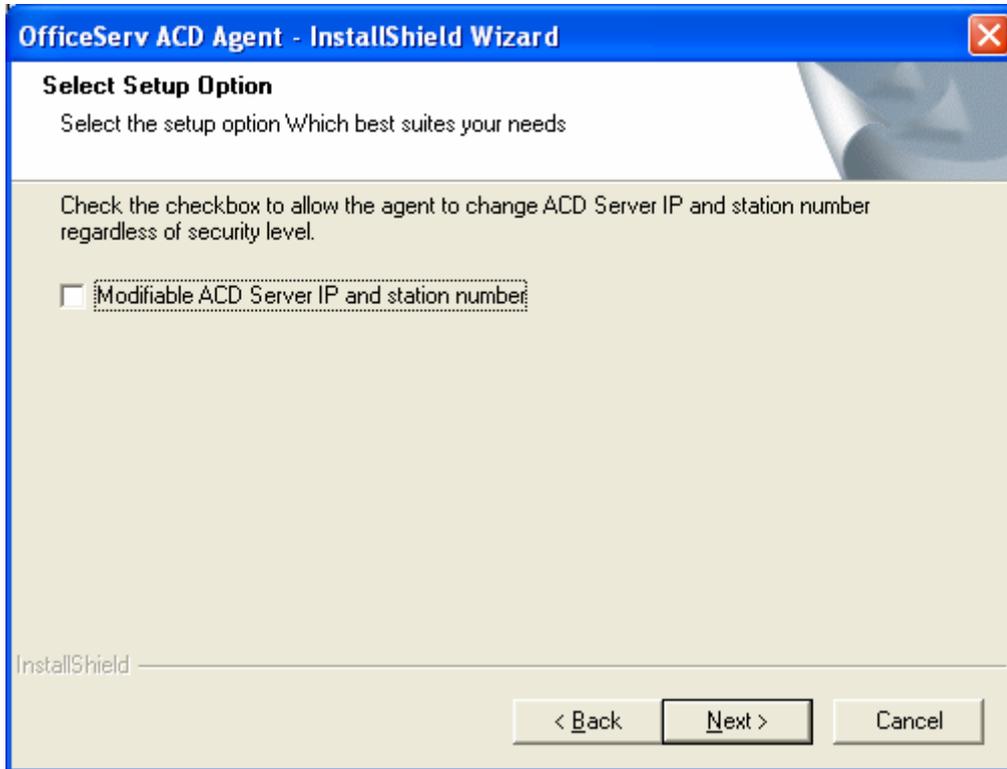
6. The **End User License** screen is displayed. Read the license and click **I accept...** radio button and **Next**, and the installation continues.



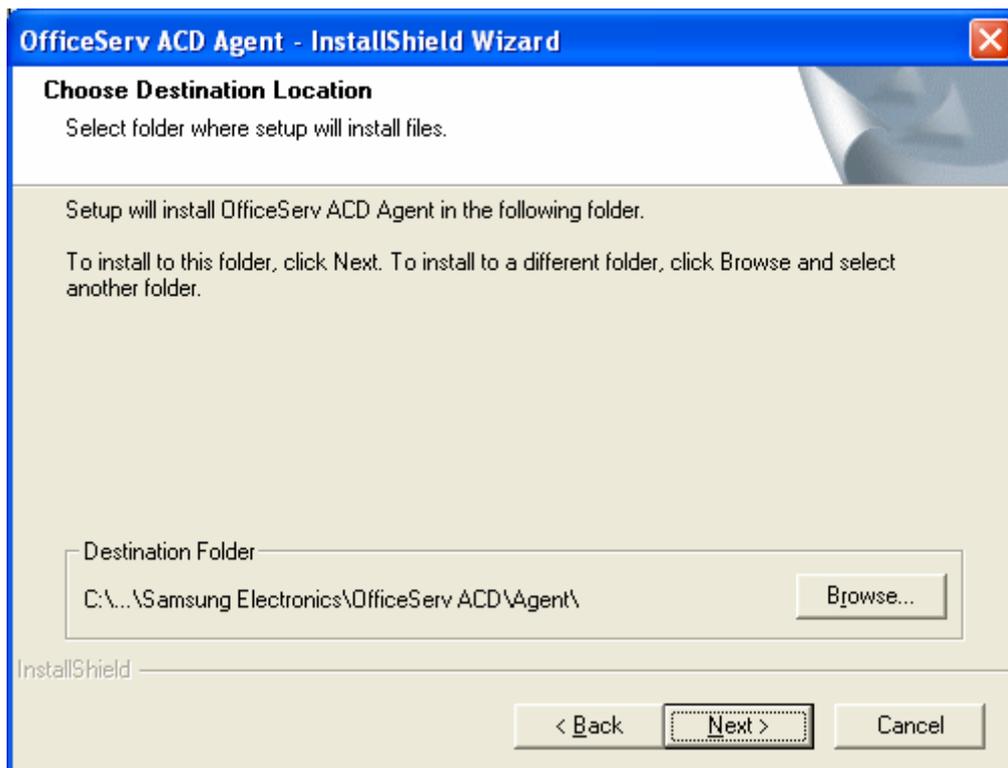
7. The **Agent Option** screen is displayed.
 - Enter the **ACD Server IP address** or DNS Name.
 - Enter Agent ID and Agent Station. Click **Next**.



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**.



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

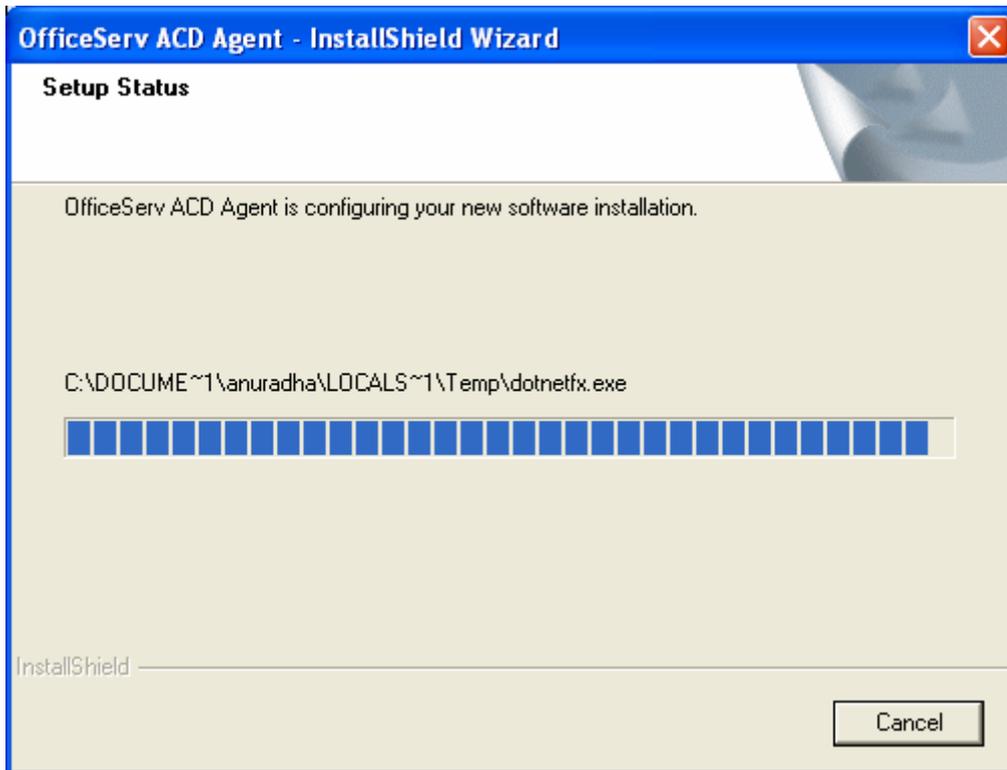


- To install in the default folder, click **Next**.

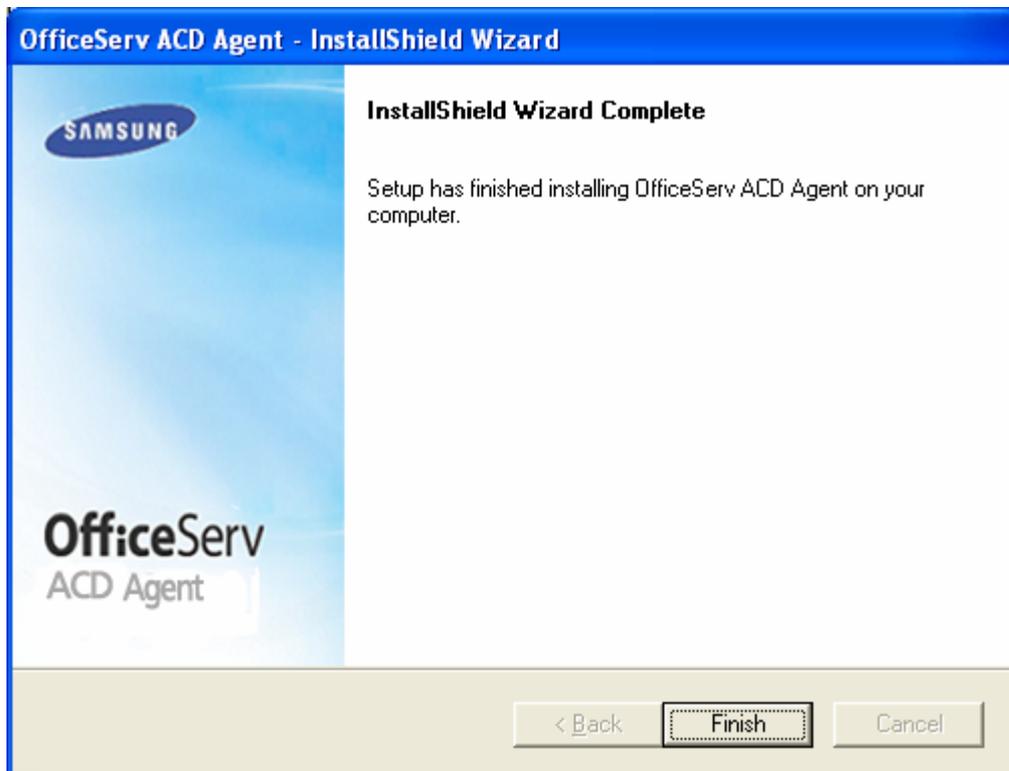
OR

- 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.



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



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.



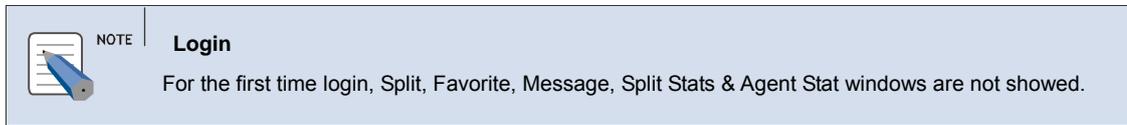
4. The agent has to configure the Login settings like IP Address, Language and other parameters. Select **File » Options » General** tab to configure the Login settings.

 **NOTE** | **Login settings**
For more information, see [General](#) option.

5. Click **Agent Control » Log In** or on **Call Control** Toolbar, click . Enter the agent password. Click **OK**

 **NOTE** | **Login**
For more information, see [Login](#) option.

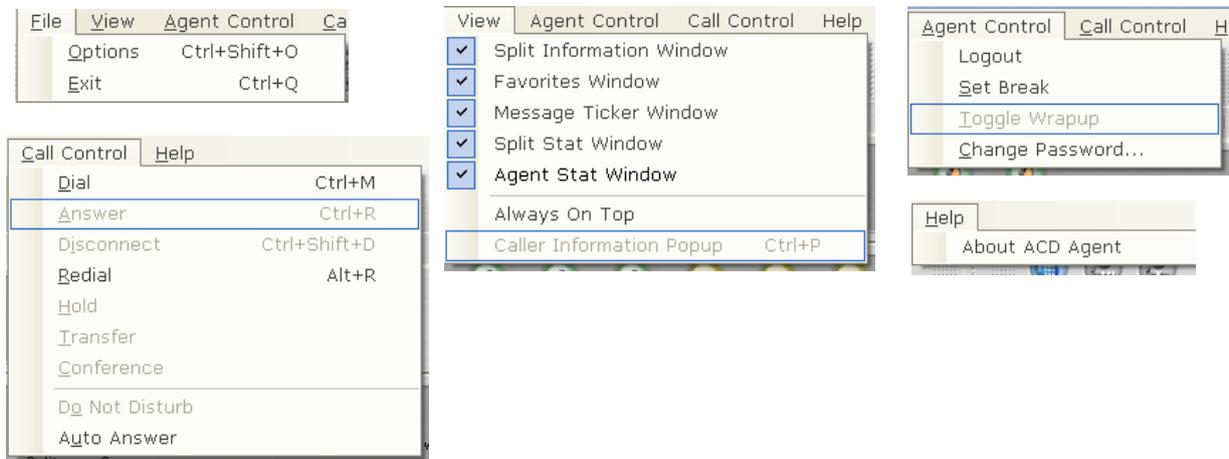
6. On successful login, the agent information is displayed in the title bar of the agent application.



Agent Menu

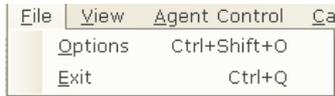
The section presents the menu bar options. Detailed descriptions on menu bar operation will be following. The section describes the options available in ACD Agent.

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

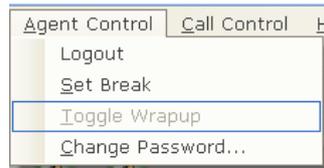


Menu	Shortcut	Description
Split Information Window		This option allows the user to hide/show the Split Information Window
Favorites Window		This option allows the user to hide/show the Favorite Window
Message Ticker Window		This option allows the user to hide/show the Message Ticker Window
Split Stat 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 pop-up	Ctrl + P	This option allows to show/hide the Caller Information for an incoming call
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Agent Control Menu

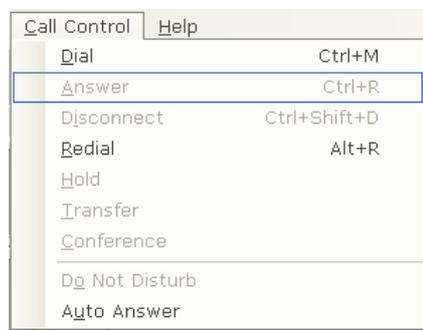
The [**Agent Control**] menu allows the user to connect to the server, change the password, set break and toggle between wrap-up.



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.



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 [**H**elp] menu presents the version and copyright information.



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

Toolbar



Icon	Description
	Login/Logout
	Break/idle

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

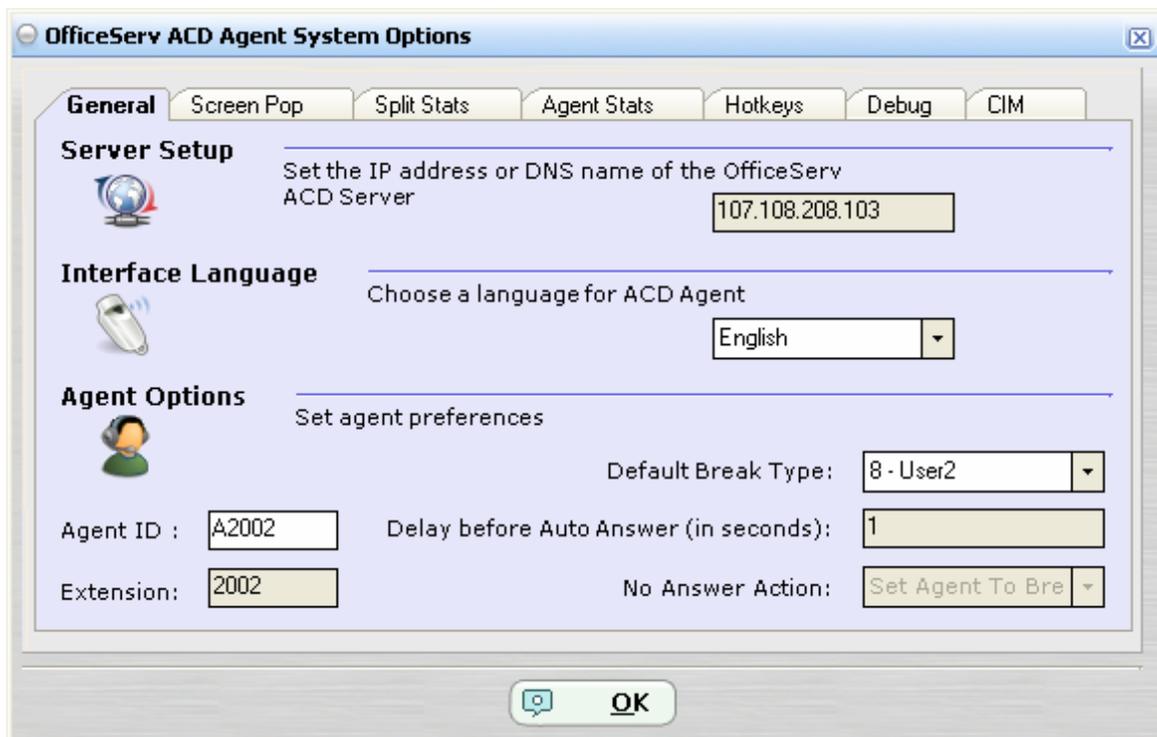
The [Options] menu allows to set the entire environment for a Agent.

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

OR

2. Right click on the **OfficeServ ACD Agent** icon in the **Notification Area** of task bar and select **File » Option**. Select **General** tab

3. The **General** dialog box is displayed.



NOTE | **General**
By default, **General** tab is displayed.

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.

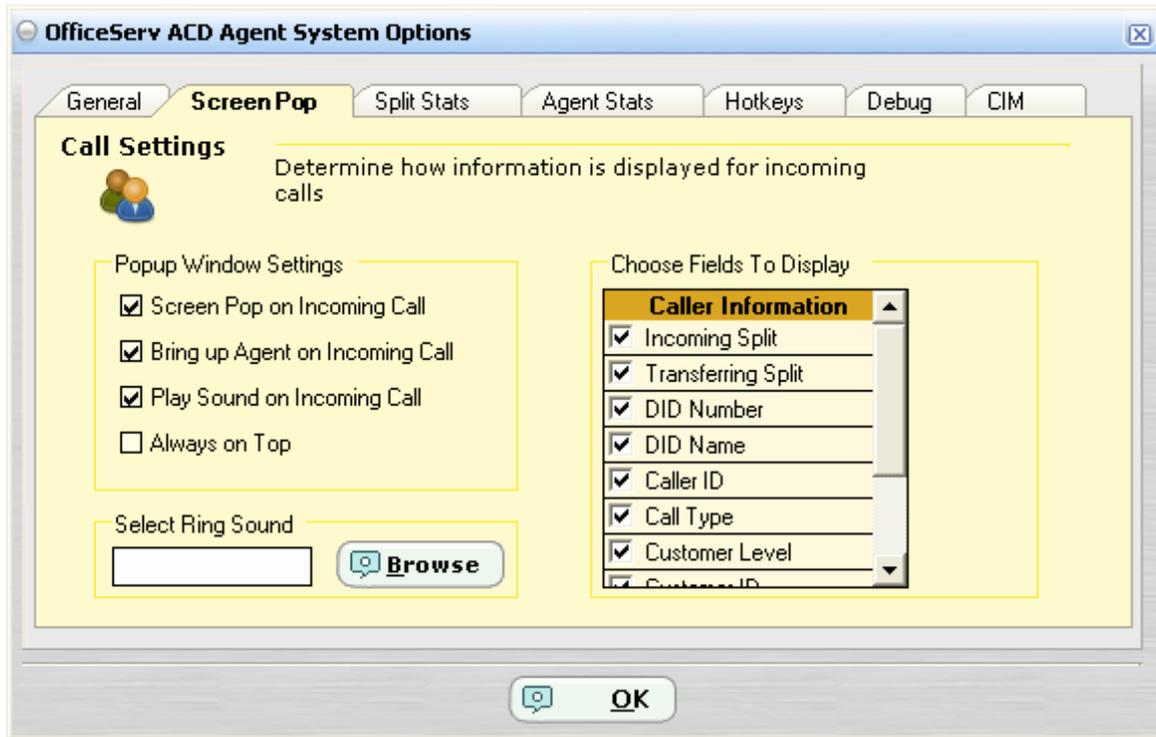
Screen Pop

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** () 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.



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

 **NOTE** | **Split Stat**
For more information, see [Split Stat Settings](#) option.

Agent Stat

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

 **NOTE** | **Agent Stat**
For more information, see [Agent Stat Settings](#) option.

Hot Keys

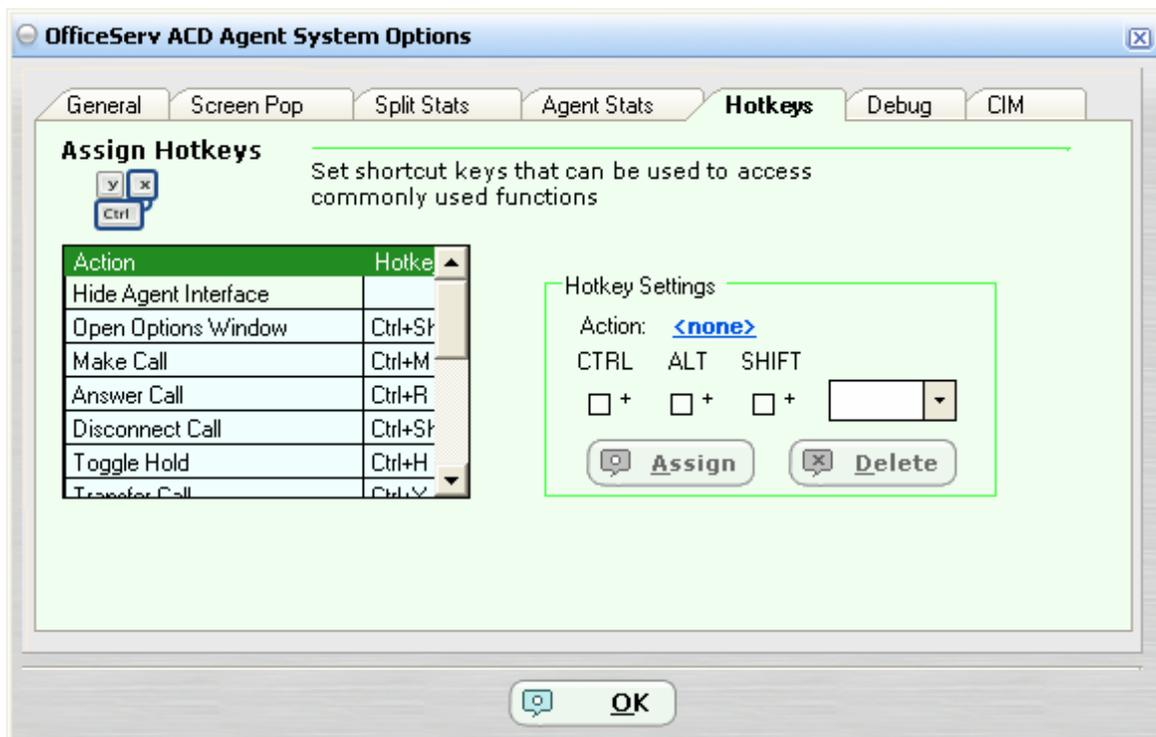
The [Hot Keys] tab allows the user to assign a keyboard shortcut to access functions in menus and sub-menus.

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

OR

2. Right click on the **OfficeServ ACD Agent**  icon in the **Notification Area** of task bar and select **File » Option**. Select **Hot Keys** tab.

3. The **Hot Keys** dialog box is displayed.



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**

 **NOTE** | **Assign**
If the assigned hot key is in use, then a error message is displayed.

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

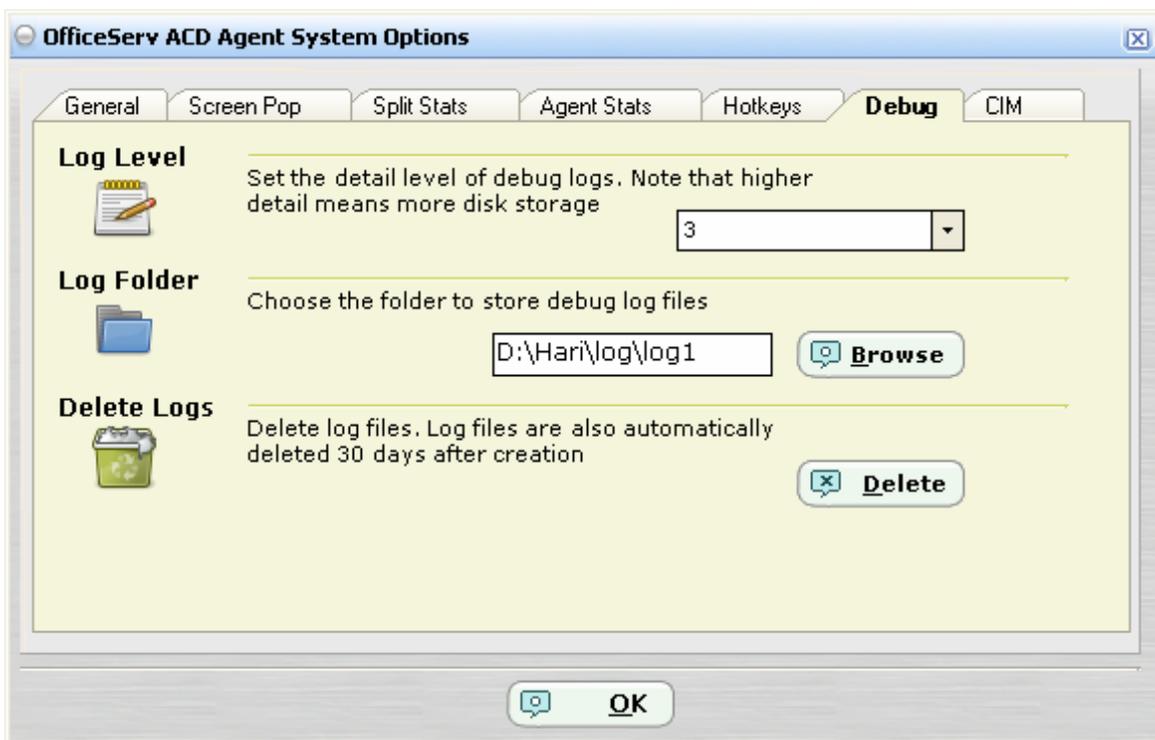
The [**Debug**] tab allows the user to set Log option.

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

OR

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

3. The **Debug** dialog box is displayed.



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.

 **NOTE** **Delete**
Log files can be deleted after 5 days from the day of creation.

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.

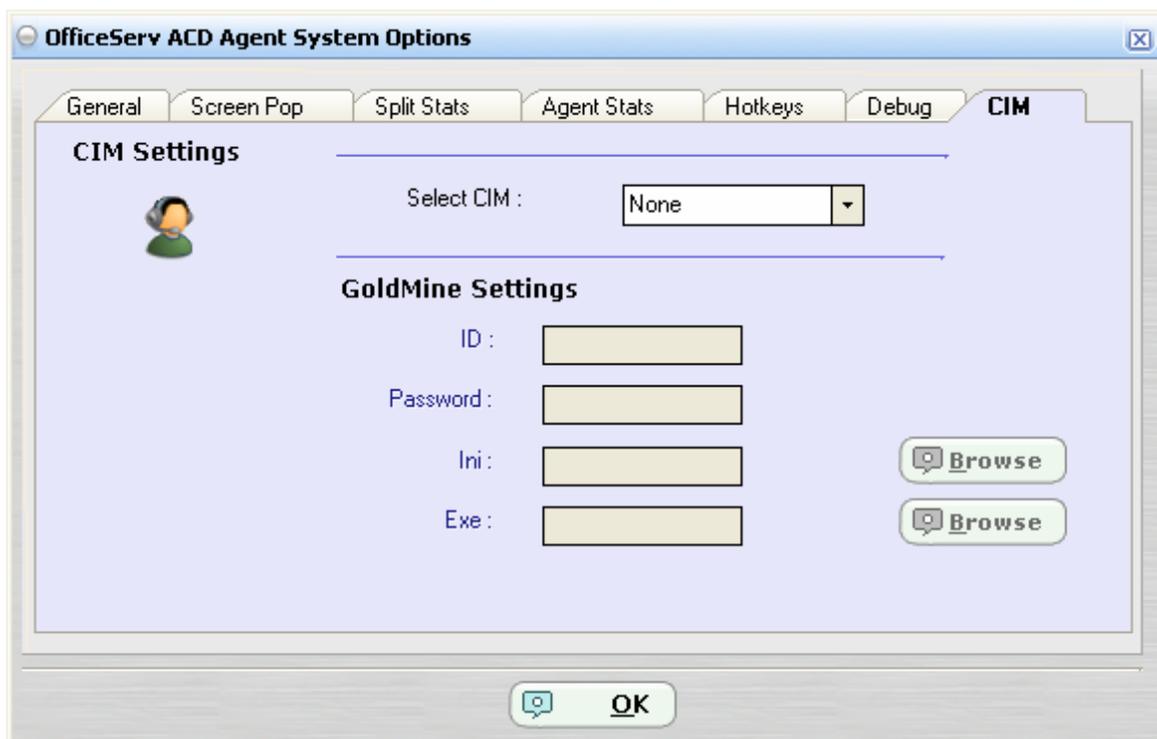


1. Select **File » Options**, on **Agent Application**. Select **CIM** tab.

OR

2. Right click on the **OfficeServ ACD Agent** (👤) icon in the **Notification Area** of task bar and select **File » Option**. Select **CIM** tab.

3. The **CIM Settings** dialog box is displayed.



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).
 - **Exe** — Enter the GoldMine exe file under **GoldMine** Installation folder or

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

- For more information, see [GoldMine](#) section
- If **Select CIM** is **ACT**, for more information, see [ACT](#) section.

5. Enter the corresponding information for the selected CIM.

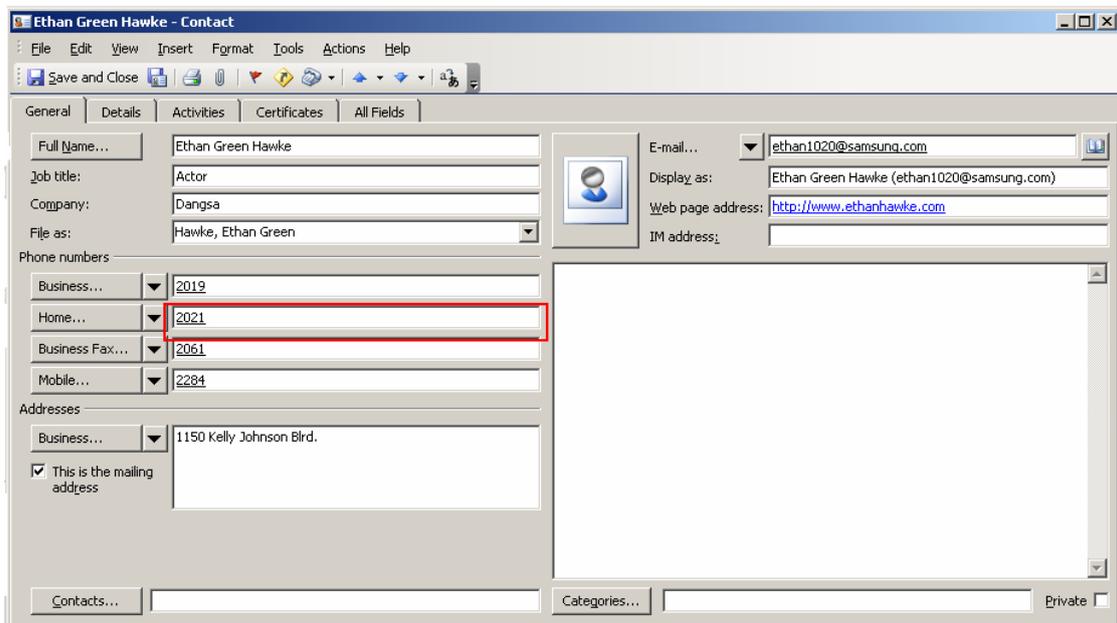
6. Click **OK** to save and exit the **Option** dialog box.

MS Outlook

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

1. From the **Windows** desktop, click **Start** and choose **Programs » Microsoft Office » Microsoft Office Outlook**.

2. The **Microsoft Outlook** is displayed.



 **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.

 **NOTE** | **Login**
For more information, see [Login](#) option

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

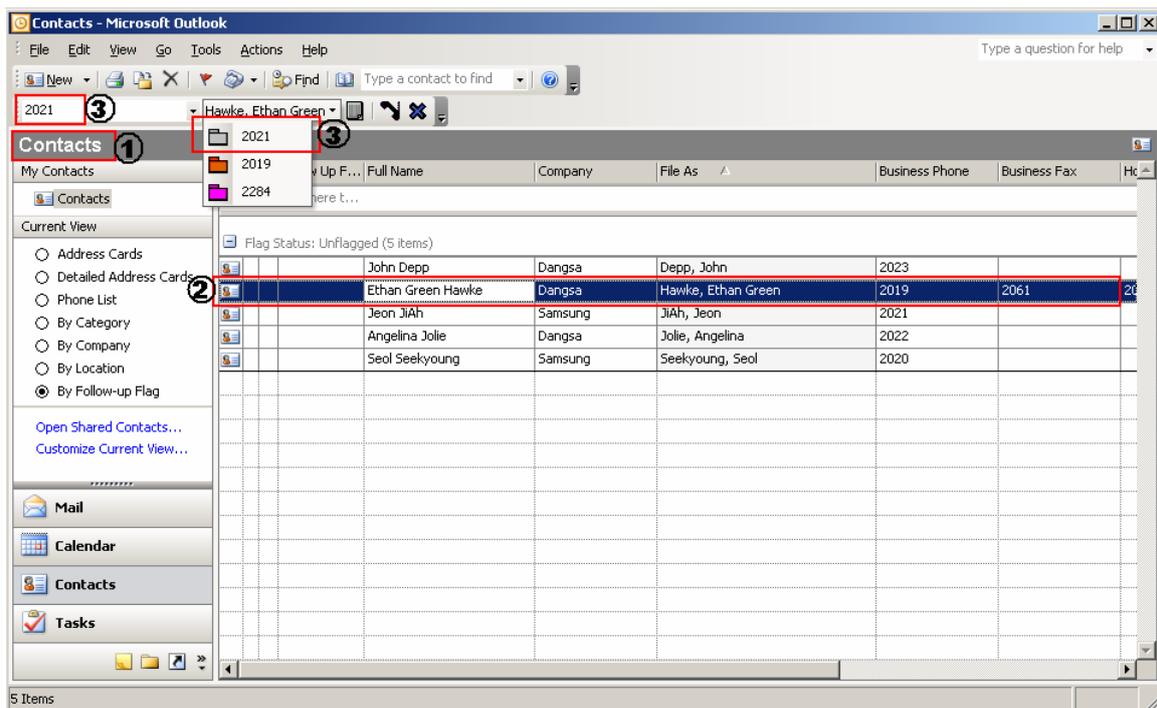
5. Outgoing Call — The agent can make a new call from Outlook.

- The toolbar is displayed, if Outlook is successfully integrated with Agent.



OR

- To view the Toolbar, follow the steps below
 - 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 ❶ in the below figure
 - Select the phone number to dial. See ❸ in the below figure.
 - The customer name is displayed in the toolbox. If click the field, the customer's phone number is displayed. See ❷ in the below figure.



- Select the number and click  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.

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

2. The **GoldMine** is displayed.

 NOTE	CIM The Select CIM field is GoldMine in CIM tab of Option menu. For more information, see CIM section.
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3. Launch **OfficeServ ACD Agent** application and login to agent.

 NOTE	Login For more information, see Login option.
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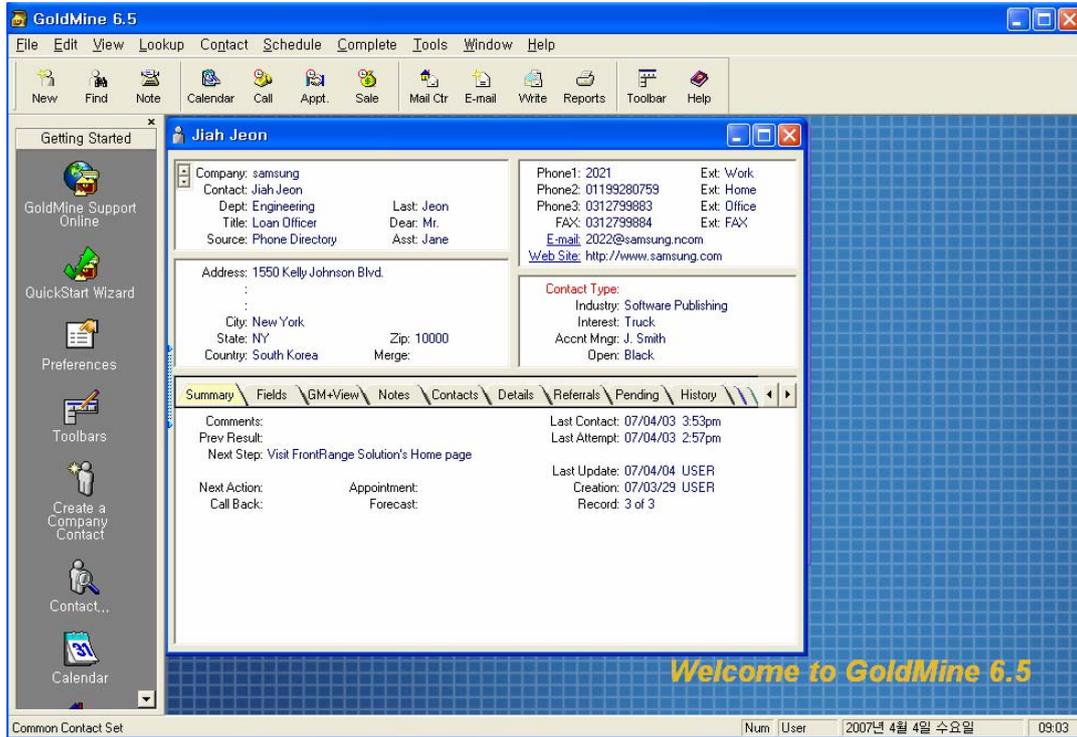
4. Incoming Call — On arrival of new call, the **Caller Information** is displayed in GoldMine

- The **Caller ID Notification** dialog box is displayed with basic Caller Information.



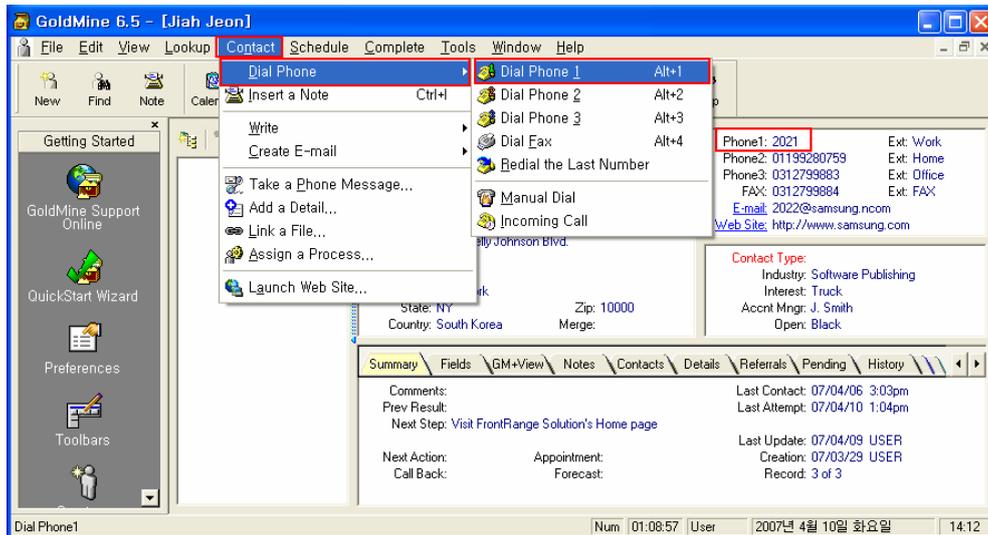
 NOTE	Caller Information Caller Id notification dialog box is displayed only if the Caller Data is saved.
---	---

- 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.



- The number is dialed.

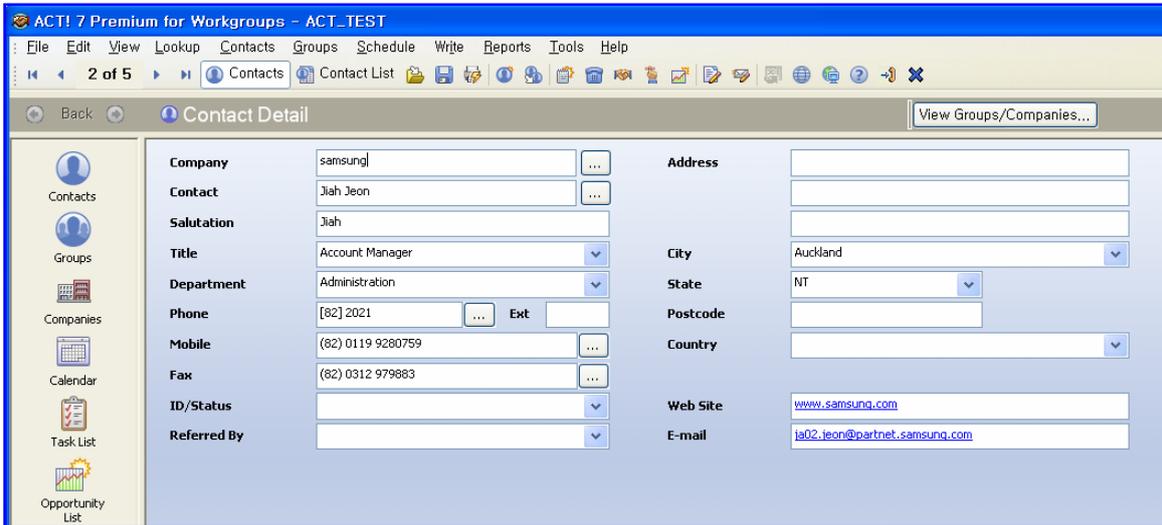
ACT

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

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

2. The ACT is displayed.

 **NOTE** | **CIM**
The **Select CIM** field is **ACT** in **CIM** tab of **Option** menu. For more information, see [CIM](#) section.



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

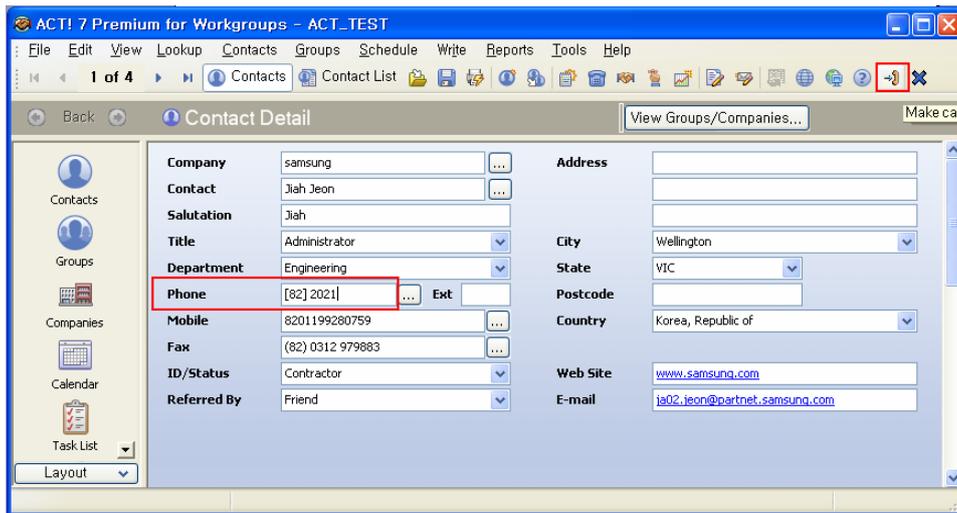
 **NOTE** | **Login**
For more information, see [Login](#) option

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

 **NOTE** | **Caller Information**
Caller Id notification dialog box is displayed only if the Caller Data is saved.

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

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



- 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.

 **NOTE** | **Login**

Before login, Server IP, Login ID, and Login Device should be set. For more information, see **Options >> General** tab.

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

OR

2. Right click on the **OfficeServ ACD Agent**  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.

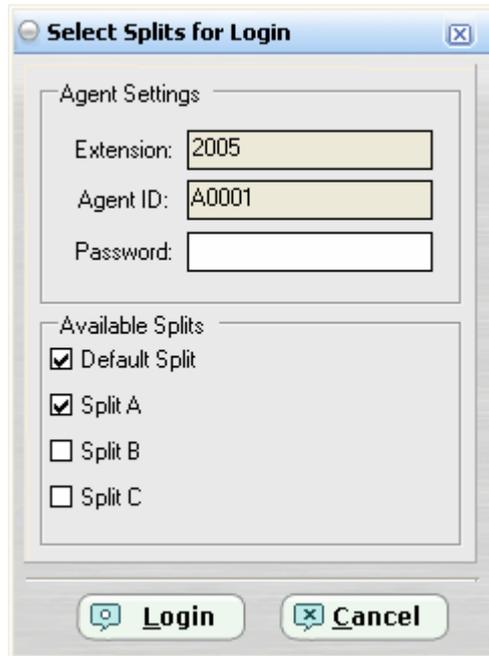
- **Password** — Enter the Password.
- Click **Login** to login to ACD Server.
- On successful log-in, agent status changes to **Break** status.



5. For Split Login

 **NOTE** | **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.



- **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 , 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** () 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.

	NOTE	<p>Logout</p> <p>If an agent failed to log out, an error message is displayed in the Status bar.</p>
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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** () 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**.

OR

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

Caller Information

Basic Call Information

DID Name:

DID Number:

Call Type:

Call For:

Arrived to me:

Answered by me:

Customer Data

Caller ID:

Customer ID:

Customer Level:

Completion Code:

- minor1
- Minor2
- code2
- minor3
- minor4

Call Notes

 **NOTE** | **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 **Supervisor** 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** (👤) icon in the **Notification Area** of task bar and select **Agent Control** » **Password**.



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**.

OR

2. Right click on the **OfficeServ ACD Agent** (👤) 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**.

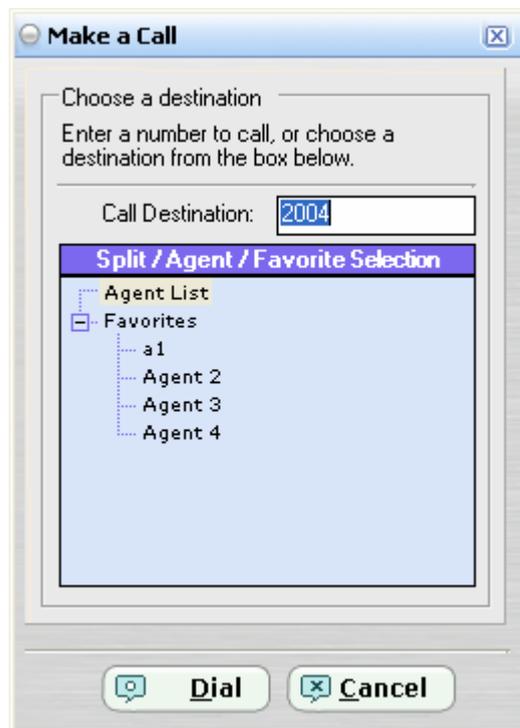
OR

2. Right click on the **OfficeServ ACD Agent** (🗨️) 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.



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



2. Select **Call Control » Answer** on **Agent Application**.

OR

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

OR

3. On **Call Control** Toolbar, click 

OR

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.

	<p>NOTE Redial</p> <p>In case, no number is present to redial, then Make a Call dialog box is displayed</p>
---	--

1. Select **Call Control » Redial** on **Agent Application**.

OR

2. Right click on the **OfficeServ ACD Agent** () 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.

	<p>NOTE Redial</p> <p>For more information, see Dial option.</p>
---	--

Hold

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

	<p>NOTE Hold</p> <p>This feature is enabled only if a single call is in progress</p>
---	--

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 » Transfer** on **Agent Application**.

OR

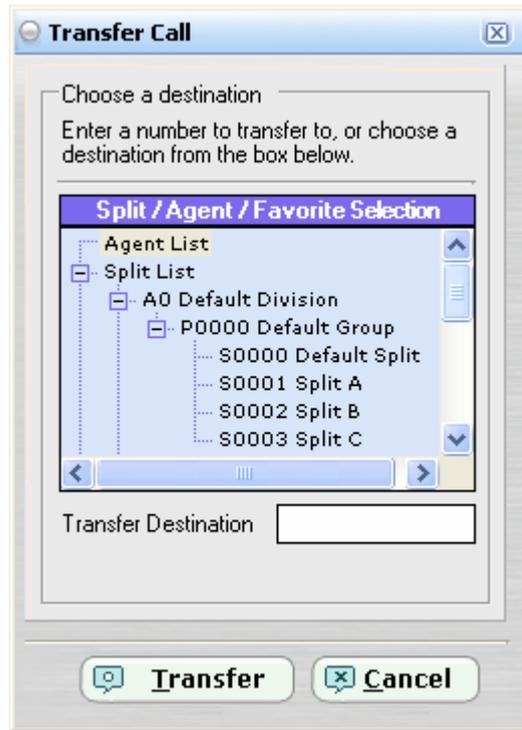
2. Right click on the **OfficeServ ACD Agent** () icon in the **Notification Area** of task bar and select **Call Control » Transfer**

OR

3. On **Call Control Toolbar**, click



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



- 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.

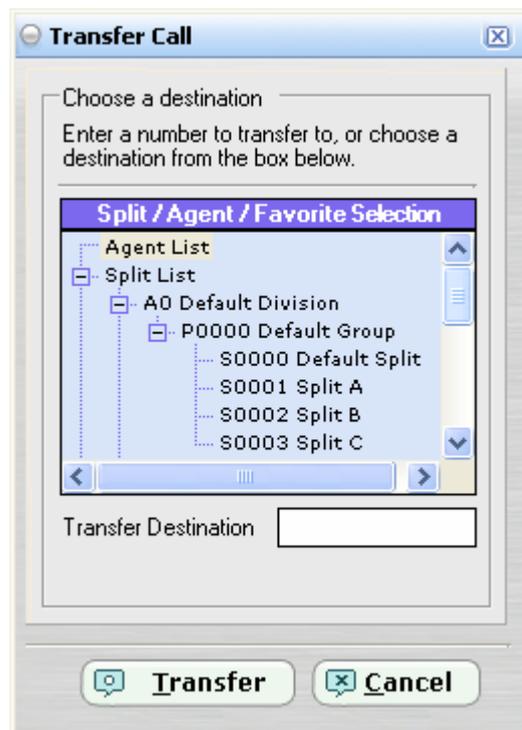
1. When an inbound call is displayed. Select **Call Control » Transfer** on **Agent Application**.

OR

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

OR

3. On **Call Control Toolbar**, click 



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.

	<p>NOTE Transfer</p> <p>This feature is enabled only if a single call is in progress</p>
---	--

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**.

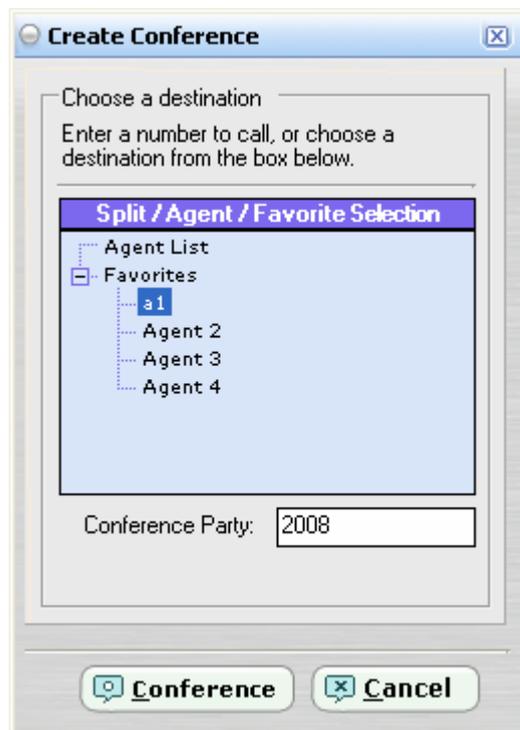
OR

2. Right click on the **OfficeServ ACD Agent** () 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.



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)

	NOTE	Conference This feature is enabled only if a single call is in progress
---	-------------	---

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** () 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.

	<p>NOTE Auto Answer Agent must have Auto Answer permission for this menu to be enabled. For more information, see Agent Permissions in Supervisor manual.</p>
---	---

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

OR

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

OR

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.

	<p>NOTE Auto Answer Auto Answer delay period is configured in Options → General</p>
---	--

Supervisor

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



NOTE

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.



NOTE

Supervisor Extension

The Supervisor's extension 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** () icon in the **Notification Area** of task bar and select **Agent Control** » **Toggle Wrapup**

OR

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

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

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**  icon in the **Notification Area** of task bar and select **Call Control** » **Toggle Wrap up**

OR

3. On **Call Control Toolbar**, click .
4. Right Click and select **Extend Wrap-up** from the pop-up menu.
5. The agent Wrap-up time is extended.

	<p>NOTE</p> <p>Extended Wrap-up</p> <p>To end the extended wrap-up status, click on Toggle Wrap-Up menu again.</p>
---	---

Break

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

1. On **Call Control Toolbar**, click .
2. The agent status changes to **Break**.

	<p>NOTE</p> <p>Break Type</p> <p>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 → Option → General → Default Break Type option.</p>
---	--

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** () icon in the **Notification Area** of task bar and select **Call Control » Set Break**

OR

3. On **Call Control Toolbar**, click 
4. The **Specify Break Type** dialog box is displayed.

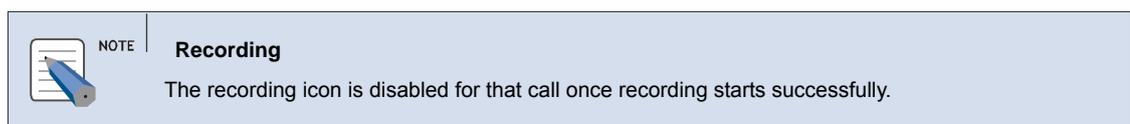


5. Select the Break type from the dropdown list.
6. Click **Select**. The agent status changes to **Break**

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.



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

CHAPTER 6. Split Operations

This section describes the Split bar operations:

Split Information Window

The [**Split Window**] menu shows or hides the Split Information window.

1. Select **View » Split Information Window** on **Agent Application**.

OR

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



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

 **NOTE** | **Split Information**
The agent multi-split information is registered by the Supervisor.

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.



NOTE

Priority

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** (👤) icon in the **Notification Area** of task bar and select **View » Favorite Window**
3. The **Favorite Window** is displayed.

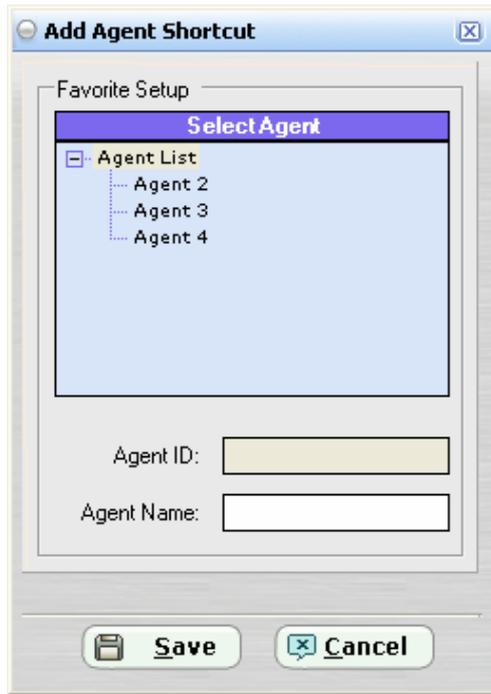


Agent

Add Agent

The [Add] option allows adding an agent to the favorite list.

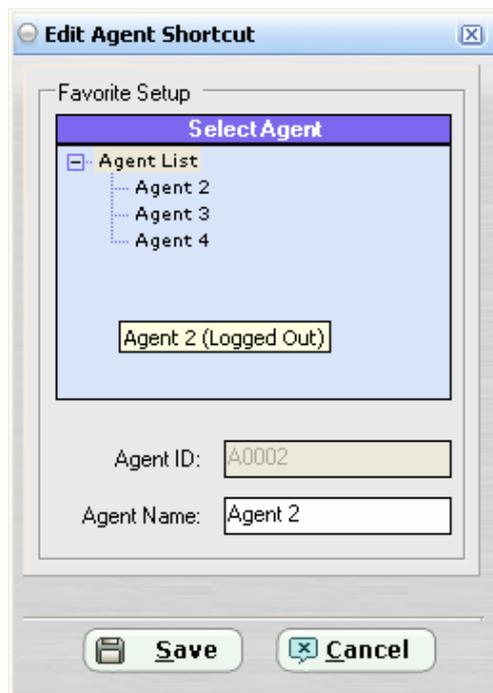
1. Right click on the **Add New** icon and select **Add Agent** from the pop-up in the **Favorite Window**.
2. The **Add Agent Shortcut** dialog box is displayed.
3. Select the agent from the **Select Agent** section.
4. The corresponding **Agent ID** and **Agent Name** is displayed. The agent can change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



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.



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

Delete Agent

The [**Delete**] option allows to delete the selected agent

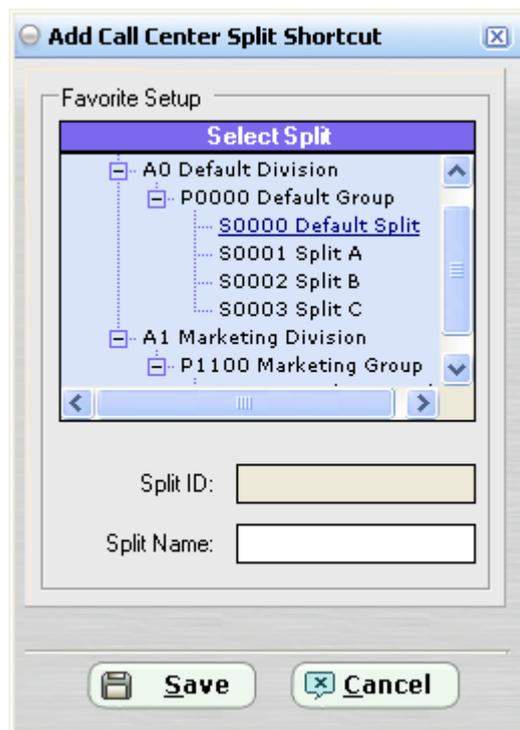
1. Right click on the logged on Agent and select **Remove Favorite** from the pop-up in the **Favorite Window**.
2. The agent is removed from the list.

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.

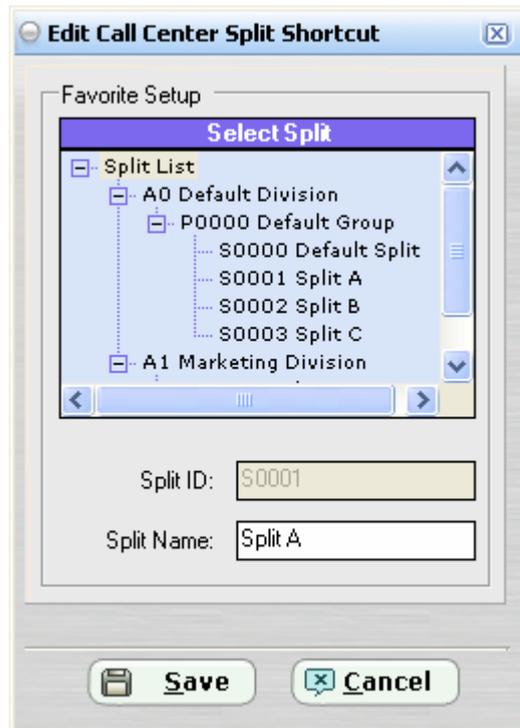


3. Select the Split from the **Select Split** section.
4. The corresponding **Split ID** and **Split Name** is displayed. The agent can change the **Split Name** if required.
5. Click **Save** to add the split to the favorite list.

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



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**.

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.



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 dialed.

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

	NOTE	Conference
For more information, see Conference 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**.

	NOTE	Add Favorite
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

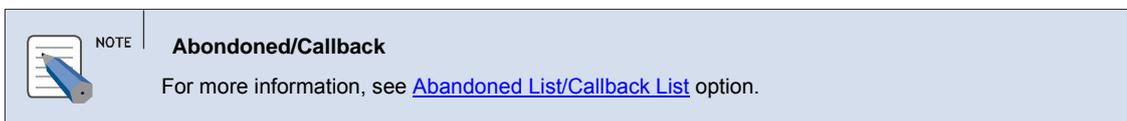
2. Right click on the **OfficeServ ACD Agent** () icon in the **Notification Area** of task bar and select **View » Message Ticker Window**.
3. The **Message Ticker Window** is displayed.



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 highlighted.



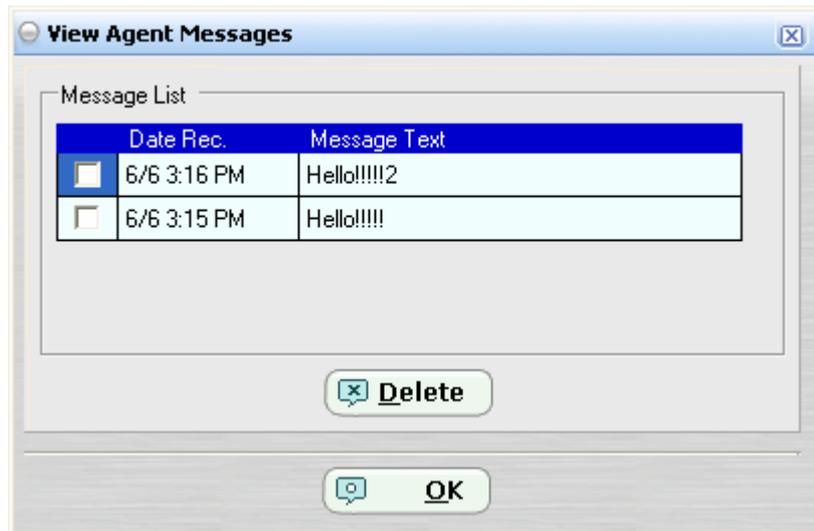
5. When agent is assigned a new abandoned/callback request via **Supervisor**, the Abandoned/Callback () icon on the right corner is highlighted and the Abandoned/Callback count is updated.



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.



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.

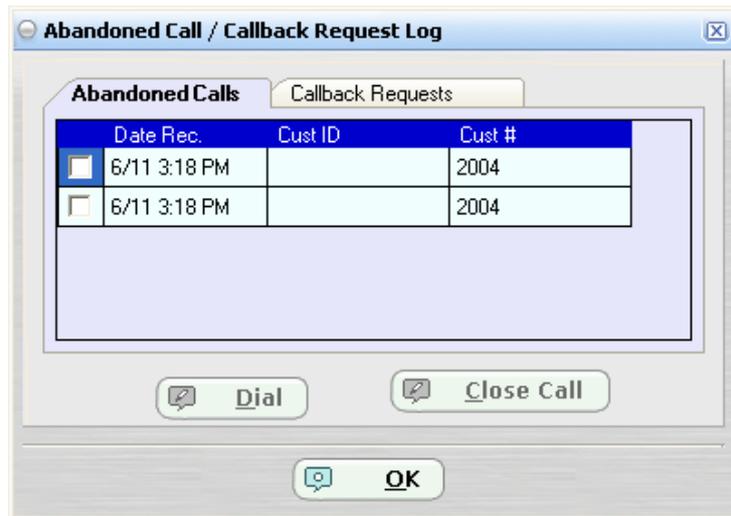
Abandoned List

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

1. Click () 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 **Dial** to make a call.

OR

6. Click **Close Call** button to close the abandoned calls.

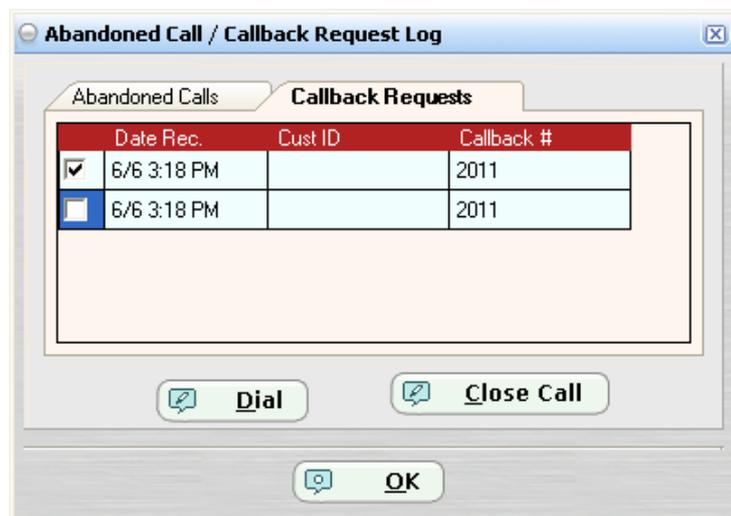


7. Click **OK** to close the dialog box.

Callback List

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

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



4. Select the call from the list.
 5. Click **Dial** 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**  icon in the **Notification Area** of task bar and select **View » Split Stat Window**.
3. The **Split Stat Window** is displayed.

	ACD IN	AGT REQ	TX2PHONE	CBK	ANS	ABD
Default Split	2	2	0	0	0	2
Split A	0	0	0	0	0	0
Split B	0	0	0	0	0	0
Split C	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.

 **NOTE** | **Split Stat Window**
For more information, see [Split Stat Settings](#) option.

Split Stat Settings

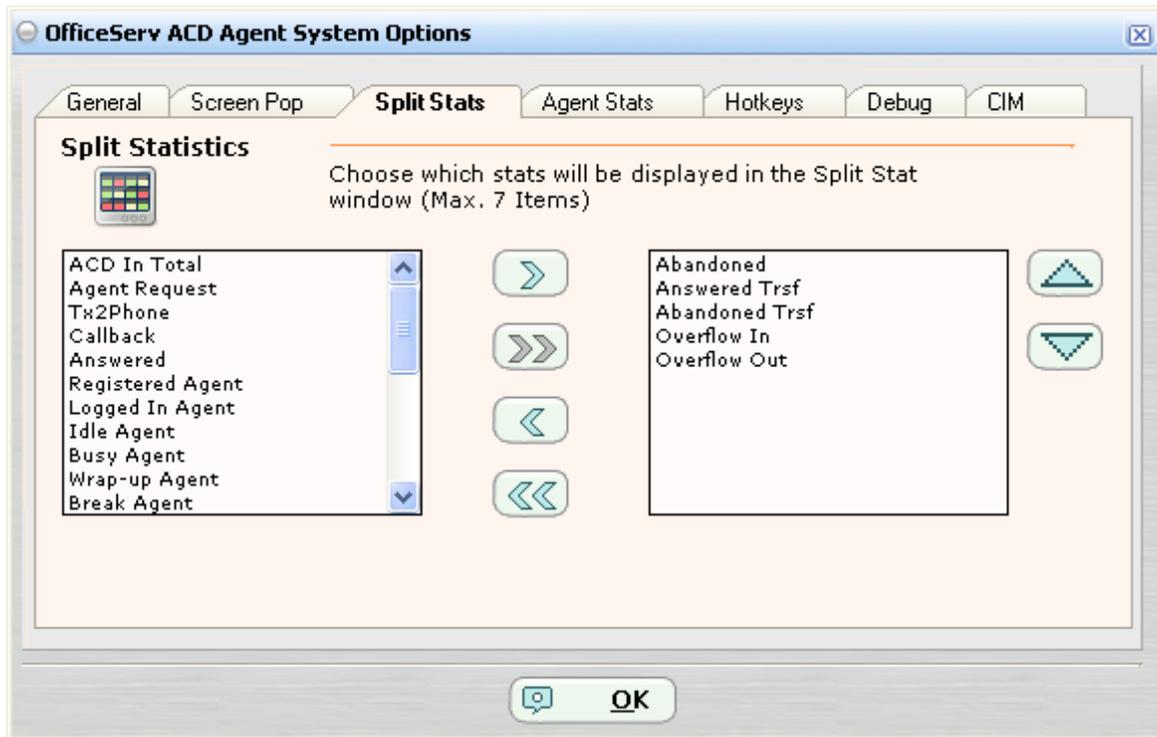
The [**Split Stat**] option allows selecting the split parameter item to be monitored

1. Select **File » Option** on **Agent Application**.

OR

2. Right click on the **OfficeServ ACD Agent**  icon in the **Notification Area** of task bar and select **File » Option**
3. The **OfficeServ ACD Agent System Options** dialog box is displayed.

- Click **Split Stats** tab. The **Split Stats** screen is displayed.



- It shows a list of 27 split parameters and only 7 parameters can be displayed at a time.
- To register a split parameter
 - Select the split parameter from the list
 - Click **Add >** button to add the parameter.
- 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
- Click **UP/Down** button to arrange the **Split** parameters.
- Click **OK** to close the dialog box.

Split Parameters

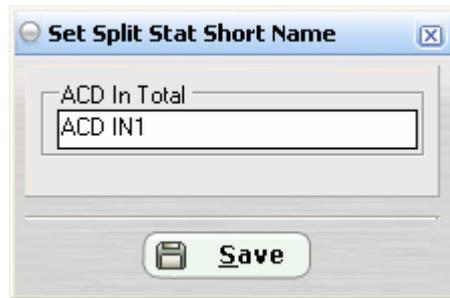
Category	Description
ACD In Total	Total number of inbound calls connected to ACD
Agent Requests	Total number of inbound ACD calls requested to the agent

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.



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** (👤) icon in the **Notification Area** of task bar and select **View » Agent Stat Window**.
3. The **Agent Stat Window** is displayed.



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

 **NOTE** | **Agent Stat Window**
For more information, see [Agent Stat Settings](#) option.

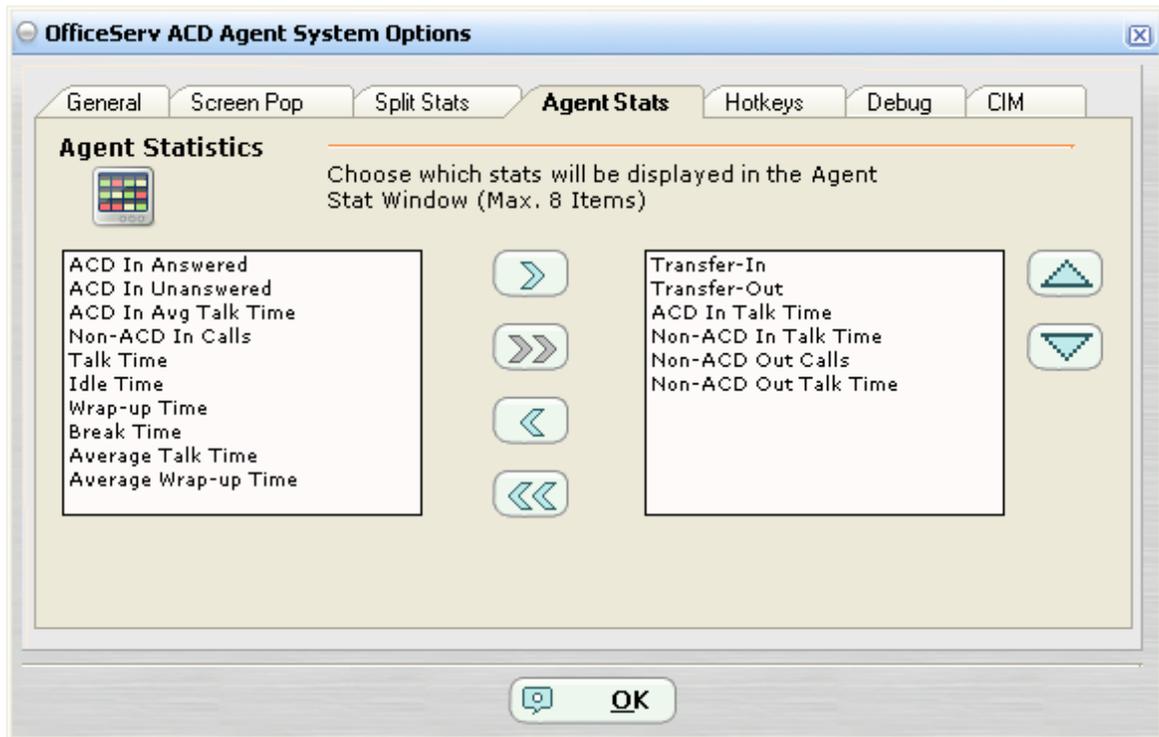
Agent Stat Settings

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

1. Select **File » Option** on **Agent Application**.

OR

2. Right click on the **OfficeServ ACD Agent** (👤) 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.



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.



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



NOTE | **Agent Permissions**
For more information, see **Agent Permissions** in **Supervisor** manual.

ABBREVIATION

A

ACD Automatic Call Distribution

C

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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