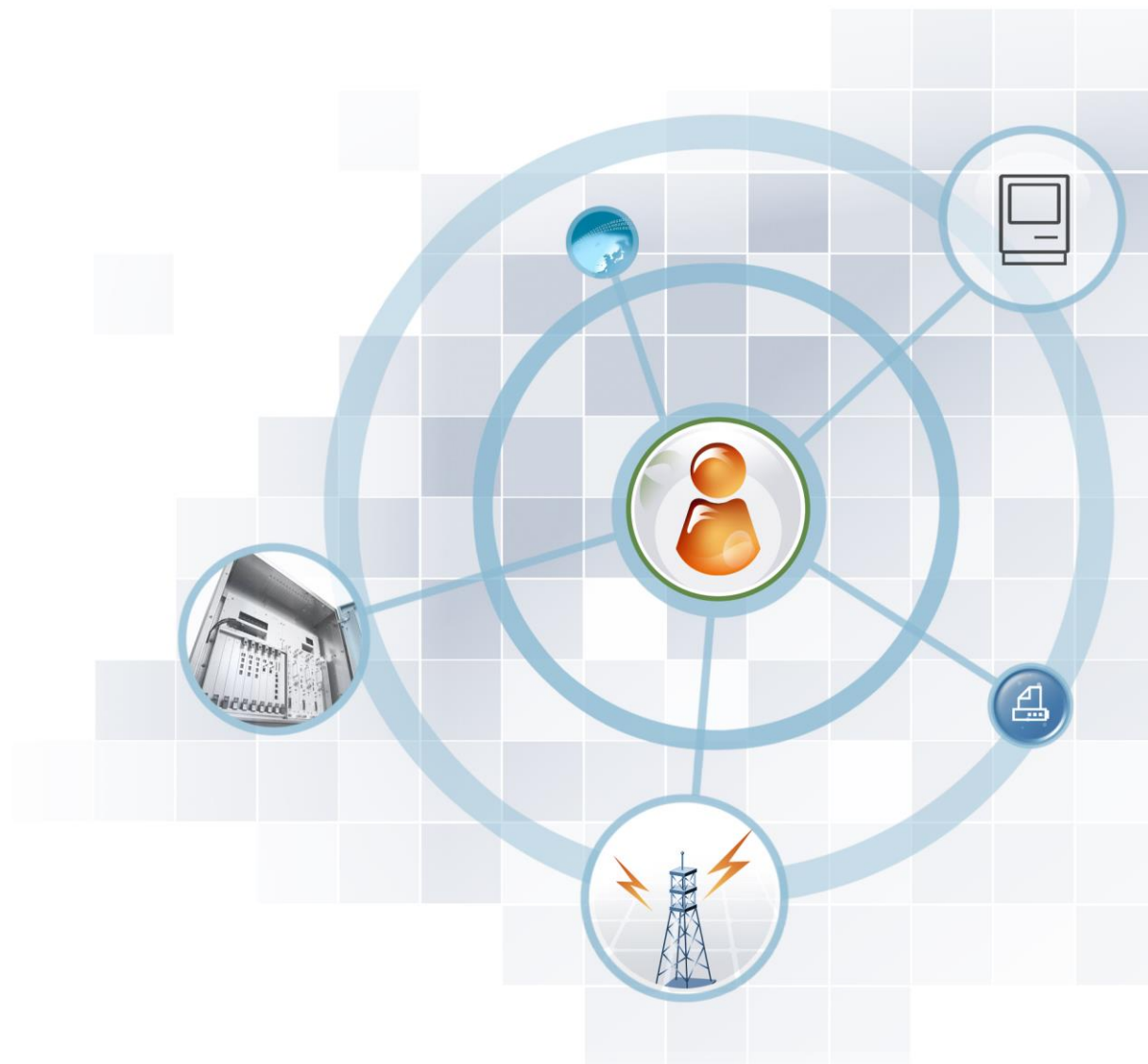


ACD-Agent

User's Guide



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INTRODUCTION

ACD Agent is a call center agent that enables call center agents to operate the SCM Express 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 ACD Agent application and describes how to operate the Agent application

Document Content and Organization

This document contains 8 Chapters and an Abbreviation.

Chapter 1. Installation

This chapter describes about Agent application installation.

Chapter 2. Agent

This chapter describes about Agent application.

Chapter 3. Basic Operation

This chapter describes about basic feature of Agent application.

Chapter 4. Call Operation

This chapter describes about call control features.

Chapter 5. Call button Operations

This chapter describes about call button features.

Chapter 6. Group Operations

This chapter describes about Group features.

Chapter 7. Favorite Operations

This chapter describes about Favorite features.

Chapter 8. Group Stats Operations

This chapter describes about Group Statistics.

ABBREVIATION

This chapter describes the frequently used acronyms.

Conventions

The following types of paragraphs contain special information that must be carefully read and thoroughly understood. Such information may or may not be enclosed in a rectangular box, separating it from the main text, but is always preceded by an icon and/or a bold title.



NOTE

Indicates additional information as a reference.

NOTE

Console Screen Output

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

Revision History

VERSION	DATE OF ISSUE	REMARKS
1.0	12. 2012.	Base Document Version

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ABBREVIATION		I
A.....		I
C.....		I
D.....		I



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CHAPTER 1. Installation

This chapter provides an overview of ACD Agent installation.

1.1 Prerequisites

1.1.1 Hardware Requirements

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

1.1.2 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

1.2 ACD Agent Installation

1.2.1 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.

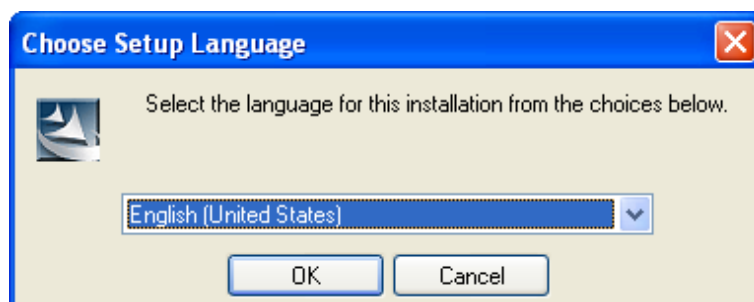


NOTE

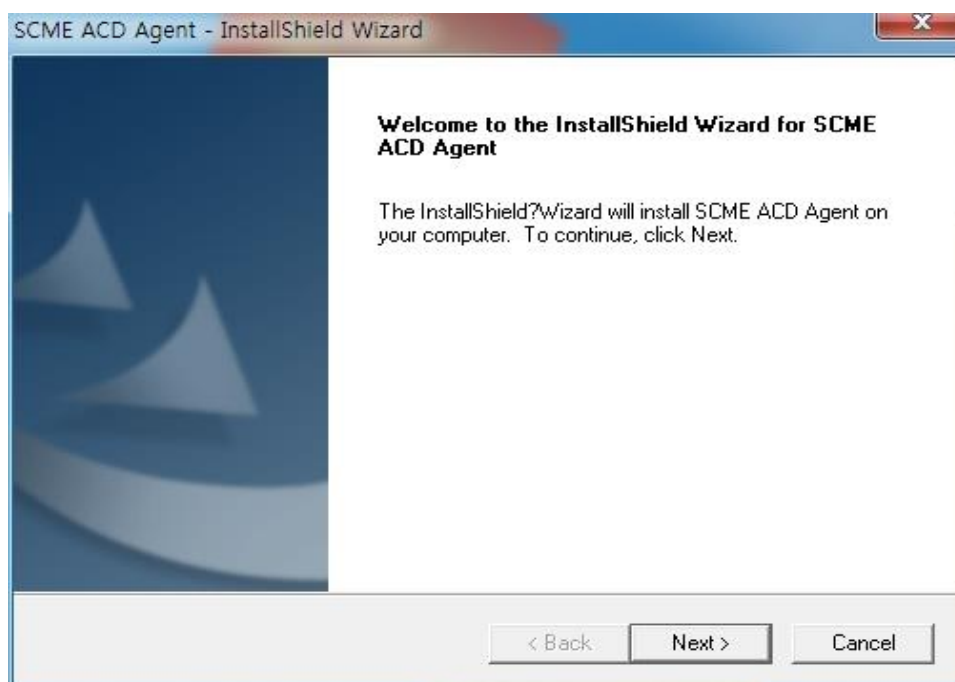
SELF-EXTRACTING

If Auto run is enabled on the system, the installation starts automatically.

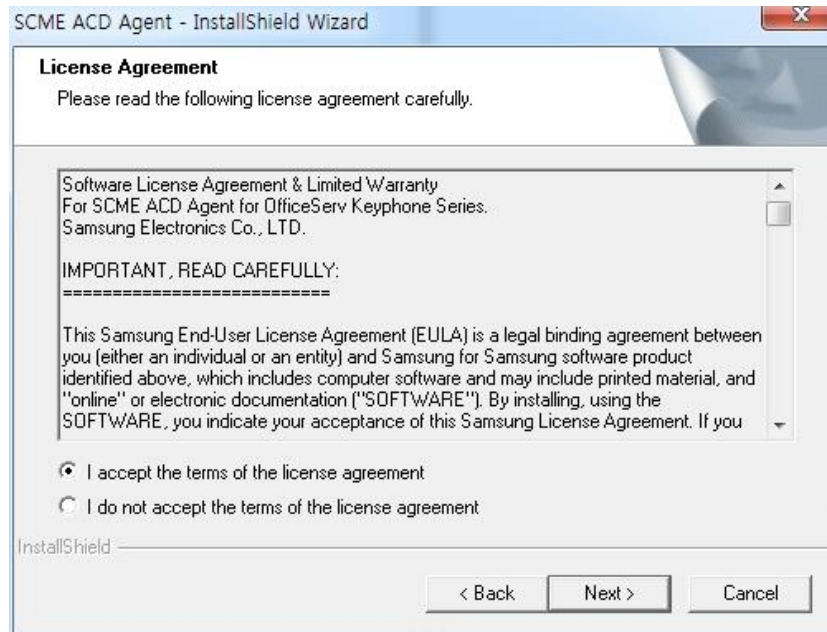
- 3) The Choose Setup Language screen is displayed. Select the language and Click OK.



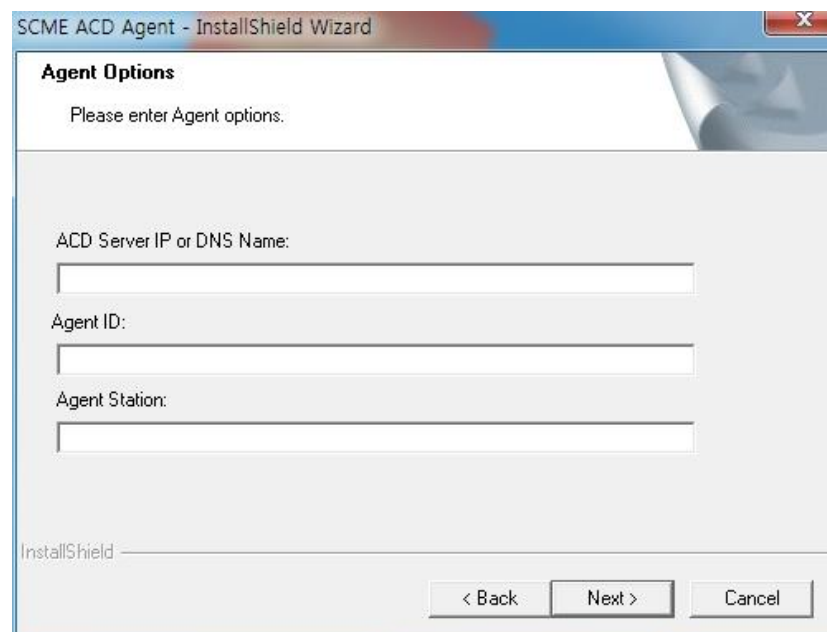
- 4) After going through the Welcome screen, click Next to continue.



- 5) The End User License screen is displayed. Read the license and click I accept... radio button and Next to continue.



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



- 7) 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.

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

- To install in the default folder, click Next.

OR

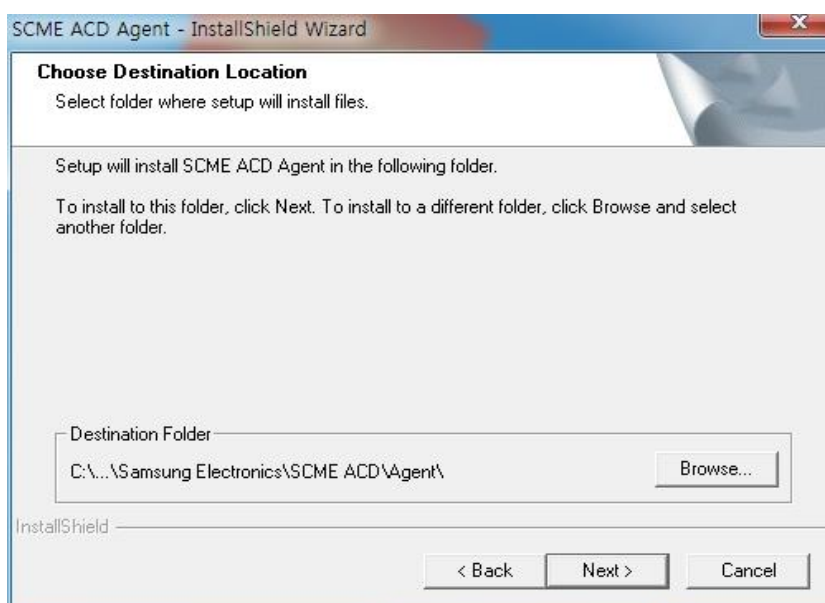
To install in a different folder, select the folder by clicking on Browse.... Click OK in the Choose Folder window



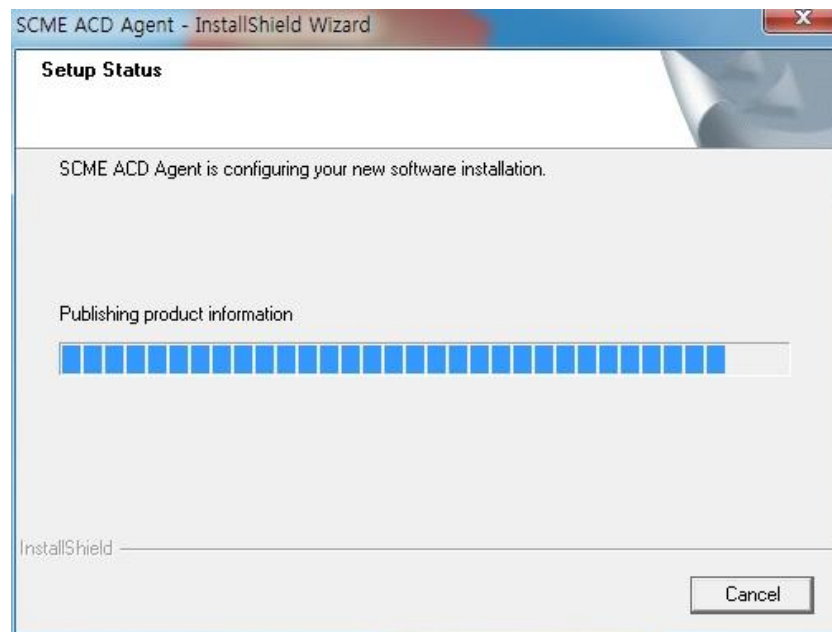
NOTE

Installation

For more information, see the images below.

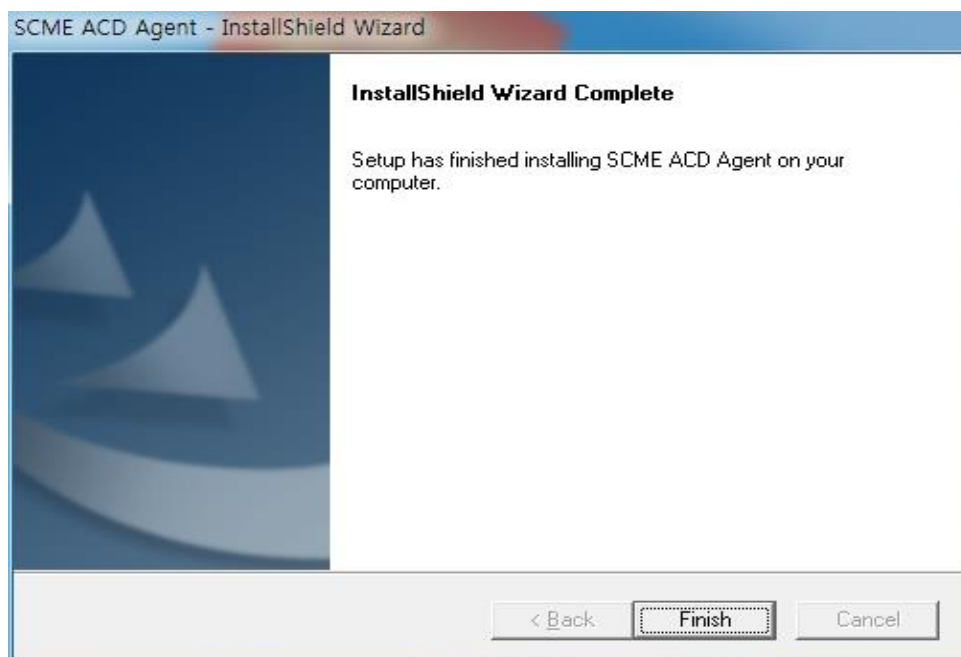


- 9) The Progress Bar of the ACD Agent Setup is displayed.

**Microsoft .Net Framework 2.0**

If the Microsoft .Net Framework is not installed then the 'The Microsoft .Net Framework 2.0 is not installed. Please install before running setup.' Message is displayed.

- 10) Click Finish, to complete the installation of ACD in the Setup Complete screen.





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CHAPTER 2. Agent

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

2.1 Starting up the Agent

To start the Agent,

- 1) From the **Windows** desktop, click **Start** and choose **Programs → Samsung Electronics → ACD → Agent**.

OR

Click  **Agent icon** on the desktop.

- 2) The **Agent application** is displayed.



- 3) 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.

- 4) Click **Agent Control → Log In** or click  on **Call Control Toolbar**.

Enter the agent password. Click **OK**.



NOTE

Login

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

- 5) On successful login, the agent information is displayed in the title bar of the agent application.



NOTE

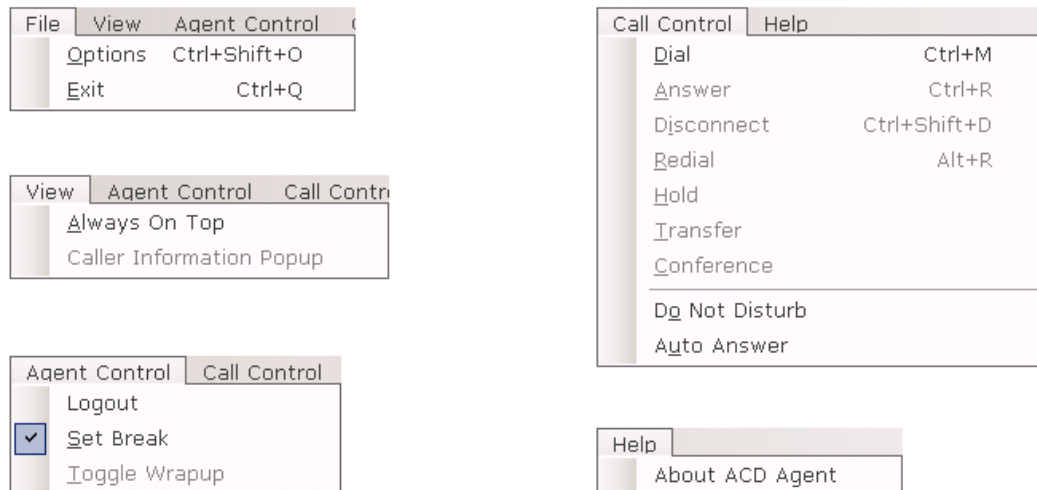
Login

For the first time login, Group, Favorite, Message, Group Stats & Agent Stat windows are not showed.

2.2 Agent Menu

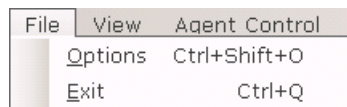
The section presents the menu bar options. Detailed descriptions on menu bar operation will be following. The section describes the options available in ACD Agent.

The menus of the Agent are the following:



2.2.1 File Menu

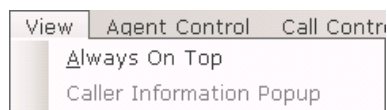
The **[File]** menu allows the user to configure agent application settings.



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.

2.2.2 View Menu

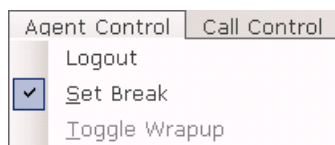
The **[View]** menu allows the user to view/hide the Group information, favorite, message ticker, Group stat, agent stat and call history windows.



Menu	Shortcut	Description
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

2.2.3 Agent Control Menu

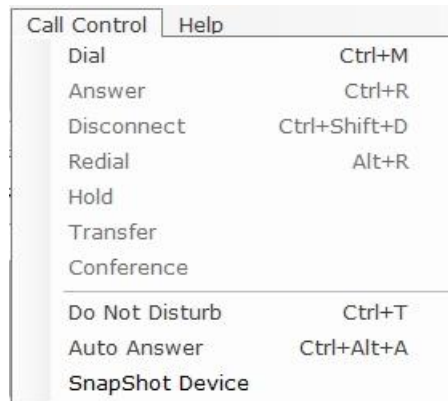
The **[Agent Control]** menu allows the user to connect to the server, change the password, set break and toggle between wrap-up.



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

2.2.4 Call Control Menu

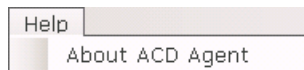
The **[Call Control]** menu allows the user to perform call related operations.



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 Group/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
SnapShot Device	-	provide information about calls associated with Agent

2.2.5 Help Menu

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



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

2.2.6 Toolbar



Icon	Description
	Login/Logout
	Break/Idle
	Extend/End wrap up
	Supervisor
	Dial
	Answer
	Disconnect
	Hold/Retrieve
	Transfer
	Conference

CHAPTER 3. Basic Operation

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

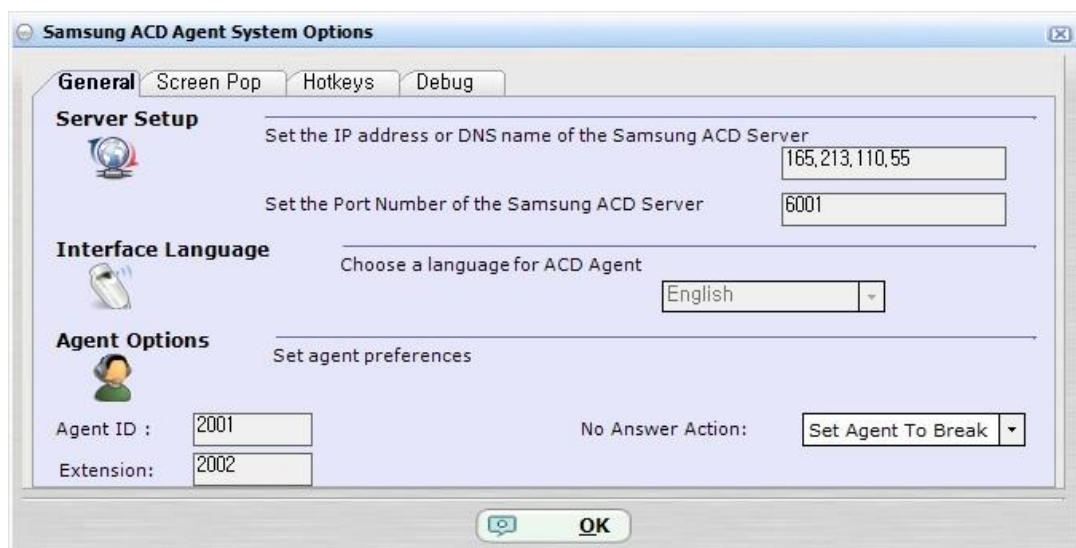
3.1 Options

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

3.1.1 General

The **[General]** menu allows setting the entire Agent environment.

- 1) Select **File** → **Options** on **Agent Application**. Select **General** tab.
OR
Right click on the **ACD Agent** (🗣️) icon in the **Notification Area** of task bar and select **File** → **Options** from the pop-up menu.
- 2) The **General** dialog box is displayed.





NOTE

General

By default, General tab is displayed.

3) **Server Setup**-Enter Server IP or DNS Name.and CSTA Port (Default: 6001).4) **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.

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.
- **Extension**-Enter the Device number. The items are used to log in by an agent.
- **Default Break Type**-Select the default break type to be applied, when the agent

click

in **Call Control Toolbar**.

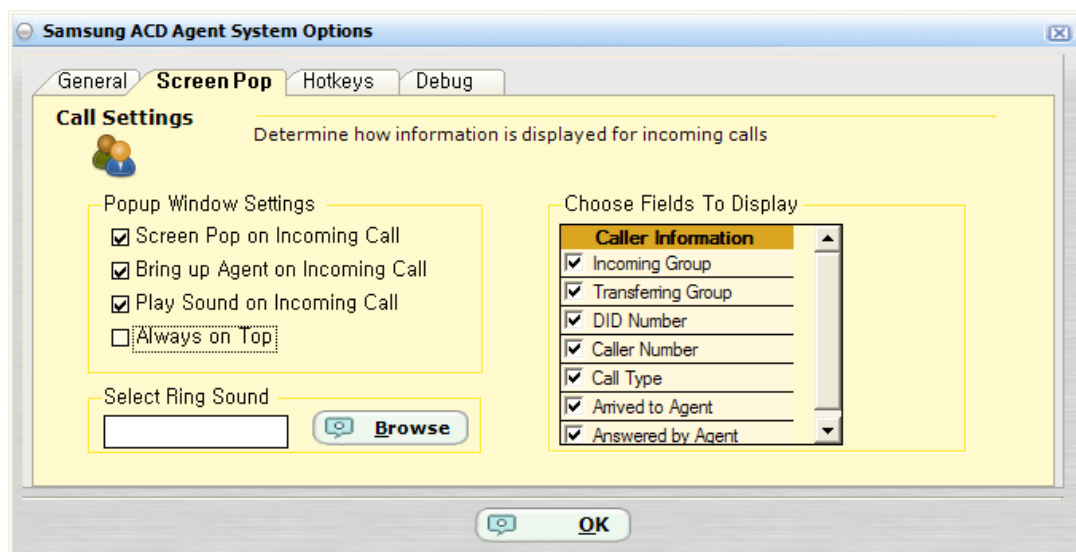
- **Delay before Auto Answer**-Enter the number of seconds, for the call to wait before it is answered automatically
- **No Answer Action**-Select the action to be taken, when the agent is not answering the incoming ACD call.

5) Click **OK** to save and close the **Option** dialog box.

3.1.2 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
Right click on the **ACD Agent** (👤) icon in the **Notification Area** of task bar and select **File** → **Options** from the pop-up menu. Select **Screen Pop** tab.
- 2) The Screen Pop dialog box is displayed.

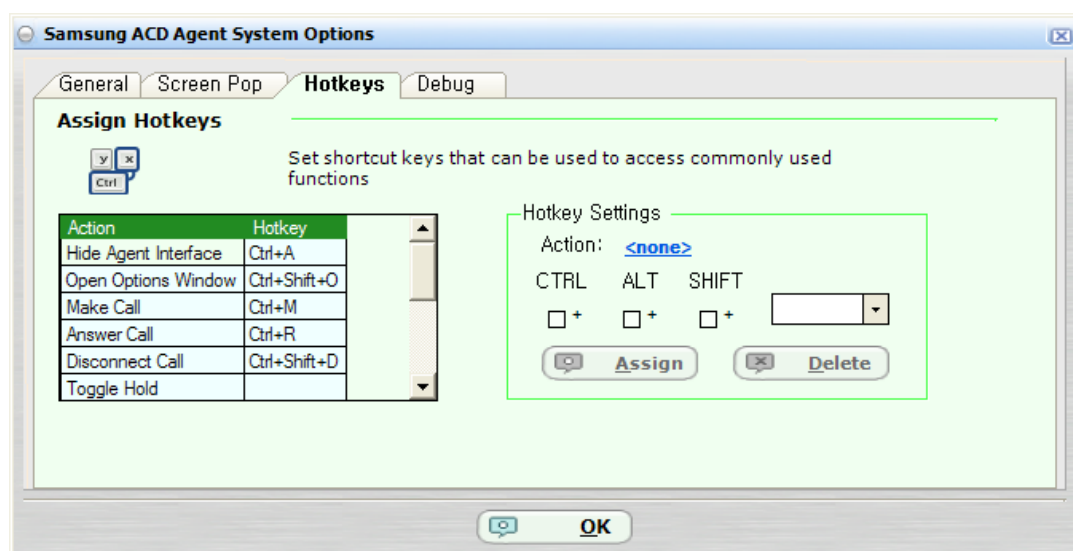


- 3) Select the appropriate options to be displayed in **Popup Window Settings**.
- 4) Select the ringing tone to be played by clicking on the **Browse** button.
- 5) **Caller Information**-Select the parameters to be displayed in the **Caller Information** dialog box.
- 6) Click **OK** to save and exit the **Options** dialog box.

3.1.3 Hot Keys

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

- 1) Select **File** → **Options** on **Agent Application**. Select Hot Keys tab.
OR
Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **File** → **Options** from the pop-up menu. Select **Hot Keys** tab.
- 2) The **Hot Keys** dialog box is displayed.



- 3) 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

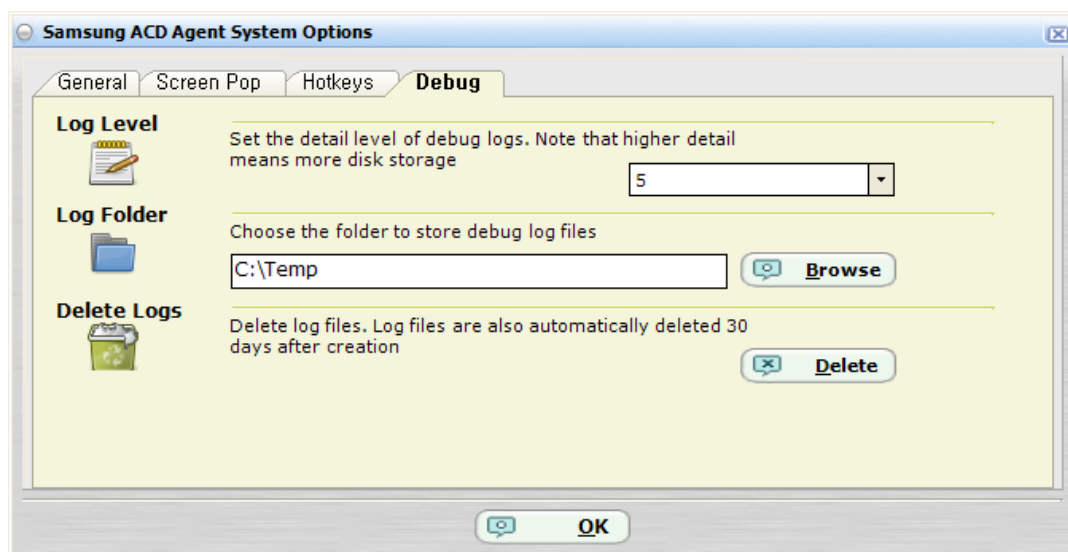
If the assigned hot key is in use, then an error message is displayed.

- 4) To Un-assign:
 - Select the action from the list to un-assign the Hot Key.
 - Click **Delete**.
- 5) Click **OK** to save & exit the **Options** dialog box.

3.1.4 Debug

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

- 1) Select **File** → **Options** on **Agent Application**. Select **Debug** tab.
OR
Right click on the **ACD Agent**  icon in the **Notification Area** of task bar and select **File** → **Options** from the pop-up menu. Select **Debug** tab.
- 2) The **Debug** dialog box is displayed.



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



Delete

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

NOTE

- 6) Click **OK** to save & exit the **Options** dialog box.

3.2 Login

The **[Login]** 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**.

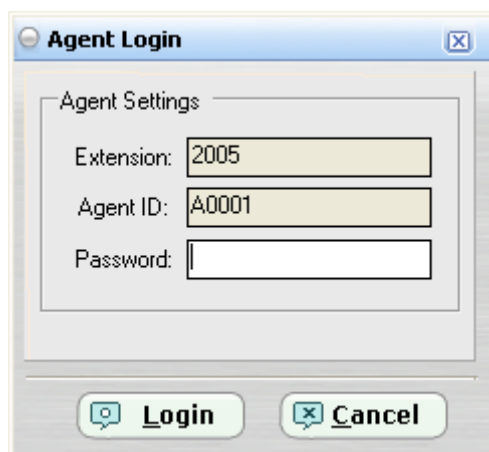
OR

Right click on the **ACD Agent** (👤) icon in the **Notification Area** of task bar and select **Agent Control → Log In** from the pop-up menu.

OR

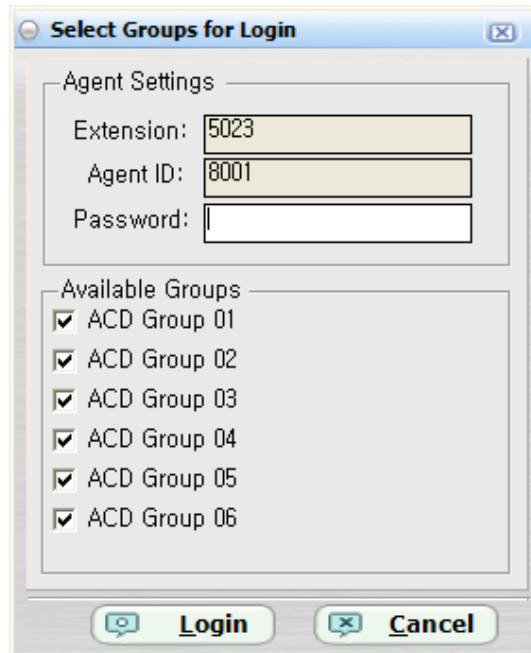
Click [🔍] on **Call Control Toolbar**.

- 2) 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.



3) For Group Login

- The Select Groups for Login dialog box is displayed.



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

4) Click [] on **Call Control Toolbar** to change status to **Available**.

3.3 Logout

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

- 1) Click **Agent Control** → **Log Out** on **Agent Application**.

OR

Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **Agent Control** → **Log Out** from the pop-up menu.

OR

Click [] on **Call Control Toolbar**.

- 2) A confirmation message ‘**Are you sure you want to Logout**’ is displayed.
- 3) Click **Yes** to log out of the ACD Server.



Logout

If an agent failed to log out, an error message is displayed in the Status bar.

NOTE

3.4 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

Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **View** → **Always on Top** from the pop-up menu.

- 2) The **Agent Application** will be on the top level of other applications.

3.5 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 **ACD Agent** (🗣️) icon in the **Notification Area** of task bar and select **View → Caller Information** from the pop-up menu.

**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) If a complete code is assigned to the agent, by the supervisor in **Supervisor** application, the **Caller Information** dialog box cannot be closed. After 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

3.6 Exit

The **[Exit]** menu allows you to exit the Agent application.

- 1) Click **File → Exit** on **Agent Application**.
OR
Right click on the **ACD Agent** (🗣️) icon in the **Notification Area** of task bar and select **File → Exit** from the pop-up menu.
- 2) The Agent Application is closed.

3.7 About ACD Agent ...

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



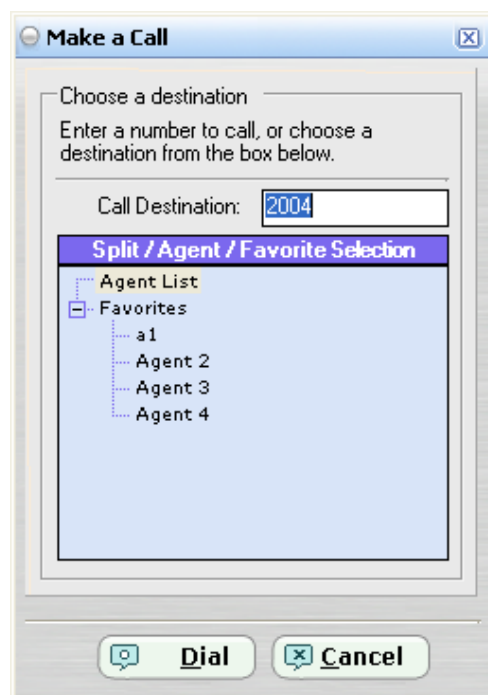
CHAPTER 4. Call Operation

This section describes the basics call operations:

4.1 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
Right click on the **ACD Agent**  icon in the Notification Area of task bar and select **Call Control** → **Dial** from the pop-up menu.
OR
Click  icon on **Call Control Toolbar**.
- 2) The **Make a Call** dialog box is displayed.



- 3) **Call Destination**-Enter the phone number
OR
Select the number in **Group/Agent/Favorite** section.
- 4) Click **Dial** button and the specified extension will be dialed.

4.2 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



NOTE

Caller Information

If Screen pop on incoming call is selected in **Options** → **Screen Pop** tab.

- 2) Select **Call Control** → Answer on **Agent Application**.
OR
Right click on the ACD Agent () icon in the Notification Area of task bar and select **Call Control** → **Answer** from the pop-up menu.
OR
Click  on **Call Control Toolbar**,
OR
Click **Answer** button on the **Caller Information** dialog box to answer the call.
- 3) The status changes to **Busy** in Status **Bar**.

4.3 Disconnect

The [**Disconnect**] option allows the user to disconnect an ongoing call.

- 1) Select **Call Control** → **Disconnect** on **Agent Application**.
OR
Right click on the ACD Agent () icon in the **Notification Area** of task bar and select **Call Control** → **Disconnect** from the pop-up menu.
OR
Click [] on **Call Control Toolbar**.
OR
Click **Disconnect** button on the **Caller Information** dialog box.
- 2) The call will be disconnected. In case, if another call is **On Hold** when a call is disconnected, the held call will be automatically retrieved.

4.4 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
Right click on the ACD Agent (👤) icon in the **Notification Area** of task bar and select **Call Control** → **Redial** from the pop-up menu.
- 2) The call is made to the previously dialed number. If previous dialed number does not exist then **Make a Call** dialog box is displayed.



NOTE

Redial

For more information, see **Dial** option.

4.5 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) Click [📞] on **Call Control Toolbar**.
- 3) The **Call Status** of the call changes to **On Hold**.



NOTE

Hold

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

4.6 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
Right click on the **ACD Agent**  icon in the **Notification Area** of task bar and select **Call Control** → **Transfer** from the pop-up menu.
OR
Click [] On **Call Control Toolbar**.

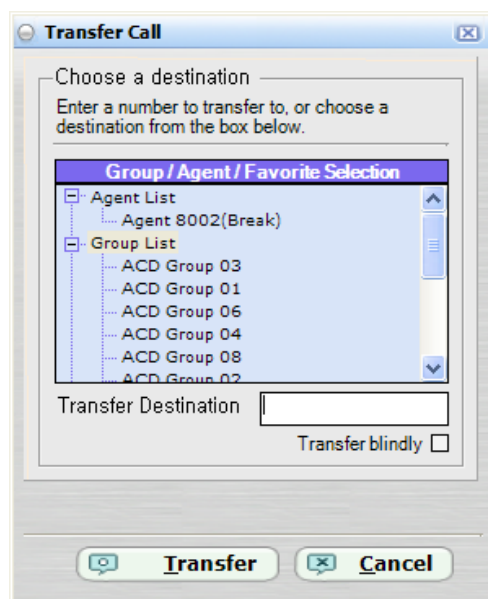


NOTE

Transfer

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

- 2) The **Transfer Call** dialog box is displayed.



- 3) Select the number in **Group/Agent/Favorite** section.
OR
Transfer Destination-Enter the phone number.
- 4) Click **Transfer** button.
 - The ongoing call status changes to **Hold** and a consult call is made to the selected agent. (Transfer Initialize)
 - Once the consult call status is **Busy**, select **Call Control** → **Transfer**, or click [] on **Call Control Toolbar**, the call is transferred. (Transfer Complete)

- 5) Select the **Blind transfer** checkbox to transfer the call in a single step i.e, without consult
- 6) The Agent status changes to **Idle**.

4.7 Transfer to Group

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

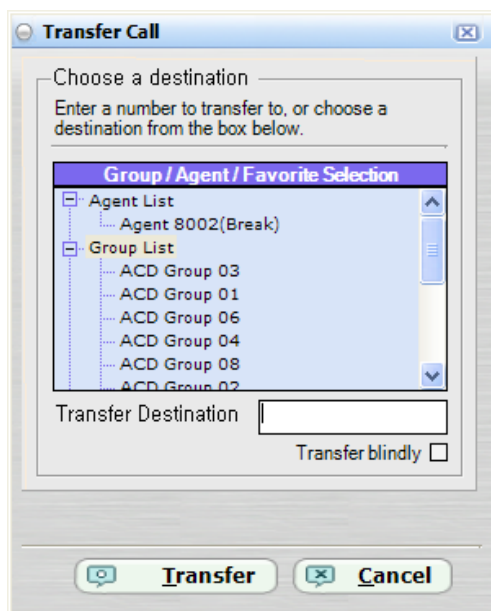


NOTE

Transfer

No Group list is displayed for Non-ACD Calls.

- 1) When an inbound call is displayed. Select **Call Control** → **Transfer** on **Agent Application**.
OR
Right click on the **ACD Agent** (👤) icon in the **Notification Area** of task bar and select **Call Control** → **Transfer** from the pop-up menu.
OR
Click [📞] on **Call Control Toolbar**.
- 2) The **Transfer Call** dialog box is displayed.
- 3) Select the Group from in **Group/Agent/Favorite** section.
OR
Transfer Destination-Enter the phone number.



- 4) Click **Transfer** button, the call is transferred to the selected Group.



NOTE

Transfer

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

4.8 Conference

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

- 1) When a call is under progress, select **Call Control** → **Conference** on **Agent Application**.

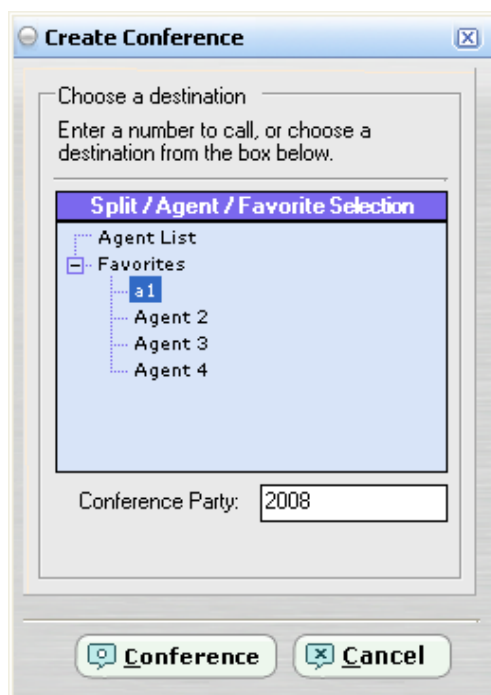
OR

Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **Call Control** → **Conference** from the pop-up menu.

OR

Click [] on **Call Control Toolbar**.

- 2) The **Create Conference** dialog box is displayed.



- 3) Select the number in **Agent List/Favorite Selection**.

OR

Conference Party-Enter the phone number

- 4) Click **Conference** button.
 - The ongoing call status changes to **Hold**. (Conference Initialize)
 - Once the Consult call is connected (Busy), select **Call Control** → **Conference**, or Click [] on **Call Control Toolbar**, the agents will be connected to the conference. (Conference Complete)

**NOTE****Conference**

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

4.9 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
Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **Call Control** → **Do Not Disturb** from the pop-up menu.
OR
Double click on **Do Not Disturb** in status bar to activate the feature.
- 2) The DND will be activated and highlighted in the status bar.

4.10 Auto Answer

The [**Auto Answer**] menu allows activating or deactivating the Auto Answer function.



NOTE

Auto Answer

Agent must have Auto Answer permission to enable this menu. For more information, see Agent Permissions in Supervisor manual.

- 1) Select **Call Control** → **Auto Answer** on **Agent Application**.
OR
Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **Call Control** → **Auto Answer** from the pop-up menu.
OR
Double click on **Auto Answer** in status bar to activate/deactivate the feature.
- 2) If the agent does not answer within the auto answer delay period, then the inbound call will be answered automatically.



NOTE

Auto Answer

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

4.11 Supervisor

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



NOTE

Supervisor Extension

This option is disabled, if Supervisor number is not configured in **Supervisor** application. For more information, see **ACD-Group** in **SCM Administrator** manual. If the agent selects a particular Group in the Group View, then the button will be enabled/disabled based on whether Group supervisor number is configured for that Group in ACD-Group.

- 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

If the agent selects a particular Group in the Group View, then the Group supervisor number configured for that Group in supervisor is dialed.

4.12 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
Right click on the **ACD Agent** () icon in the **Notification Area** of task bar and select **Agent Control** → **Toggle Wrapup** from the pop-up menu.
OR
Click [] on **Call Control Toolbar**.
- 2) Select **End Wrap-up** from the pop-up menu.
- 3) The agent status changes to **Idle** from **Wrap-up** status.

4.13 Extend Wrap-Up

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

- 1) Right click on the **ACD Agent**  icon in the Notification Area of task bar and select **Call Control** → **Toggle Wrap up** from the pop-up menu.
OR
Click [] on **Call Control Toolbar**.
- 2) Right Click and select **Extend Wrap-up** from the pop-up menu.
- 3) The agent Wrap-up time is extended.



NOTE

Extended Wrap-up

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

4.14 Break

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

- 1) Click [] on **Call Control Toolbar**.
- 2) The agent status changes to **Break**.

CHAPTER 5. Call Button Operations

This section describes the call button list and its operations.

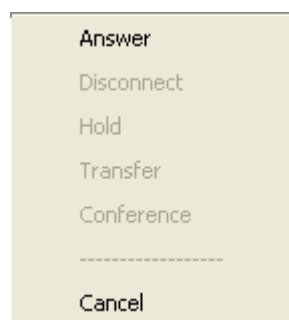
5.1 Call Button List

The Agent main window displays a list of call buttons enabled in the device to which agent has logged in. The multiple call button allow the agent to have multiple held calls (One on each call button) and one active call at any point of time.



5.1.1 Call Button Menu

When agent right clicks on the call button, the call button menu pops up.



Menu	Description
Answer	This option allows the user to answer an Incoming call on the selected call button
Disconnect	This option allows the user to disconnect an ongoing call on the selected call button.
Hold	This option allows the user to place a call on hold or retrieve the hold call on the selected call button
Transfer	This option works as described in the Call Operations chapter (For the selected call button)
Conference	This option works as described in the Call Operations chapter (For the selected call button)

CHAPTER 6. Group Operations

This section describes the Group-Bar operations.

6.1 Group Information Window

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

- 1) Select **View** → **Group Information Window** on **Agent Application**.
- 2) The **Group Information Window** is displayed.



- 3) List of Group is displayed, to which logged in agent belongs.



NOTE

Group Information

The agent multi-Group information is registered by the ACD-Group.

6.2 Group Log-in

The [**Group Log -in**] option allows the agent to log in to the selected Group.

- 1) Select the Group to log-in. The corresponding **Group** details are displayed.
- 2) Right click on **Group Icon** and select **Log-in** from the pop-up menu.
- 3) On successful login, the Group status changes to **Logged-in**.

6.3 Group Log-out

The [**Group Log -out**] option allows the agent to log out of the selected Group.

- 1) The Agent status should be in **Break**.
- 2) Select the Group to log-out. The corresponding Group detail is displayed.
- 3) Right click on **My Status** field and select **Log-out** from the pop-up menu.
- 4) The agent is logged out of the Group.

6.4 Group Supervisor

The [**Supervisor**] option allows agent to dial the Group supervisor number.



Group Supervisor

Group Supervisor device number should be configured in ACD-Group.

- 1) Double click on the **Supervisor** number.
- 2) The supervisor number will be dialed.
- 3) If there is an ongoing call, it will be put on hold before dialing the Supervisor number.

6.5 Cancel

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

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

CHAPTER 7. Favorite Operations

This section describes the Favorite bar operations:

7.1 Favorite Bar

The [**Favorite Window**] menu shows or hides the Favorite tab in the tabbed window.

- 1) Select **View** → **Favorite** Window on **Agent Application**.
- 2) The **Favorite Window** tab is displayed in the tabbed window.

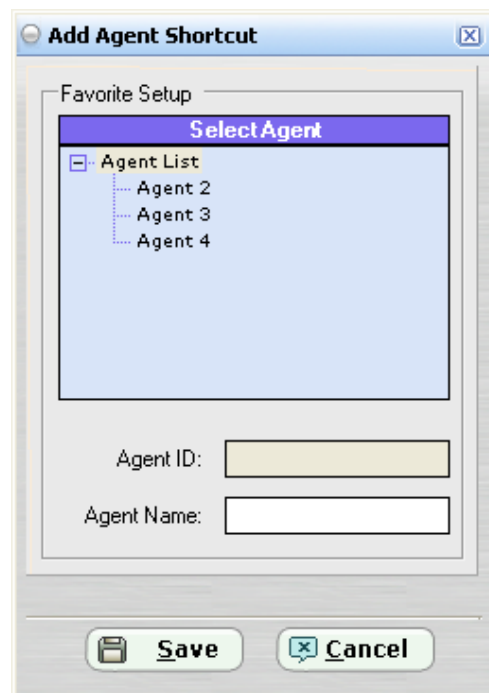


7.2 Agent

7.2.1 Add Agent

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

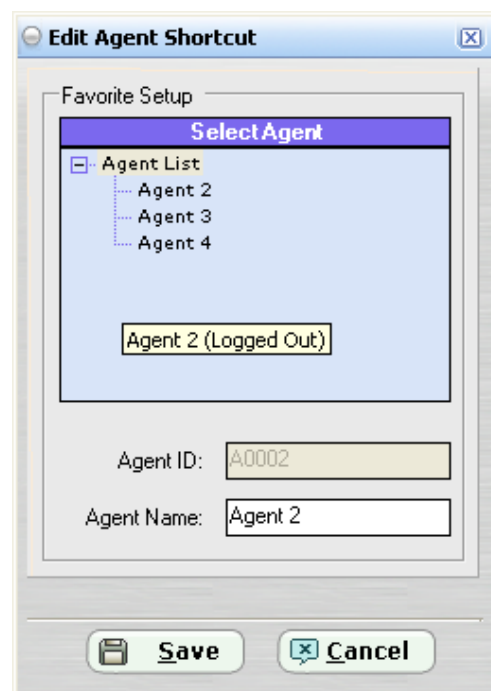
- 1) Right click on **Favorite view** and select **Add Agent** from the pop-up menu in the **Favorite Window**.
- 2) The **Add Agent Shortcut** dialog box is displayed.
- 3) Select the agent from the **Select Agent** section.
- 4) The corresponding **Agent ID** and **Agent Name** are displayed. The agent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



7.2.2 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 menu 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.



7.2.3 Delete Agent

The **[Delete]** option allows deleting the selected agent

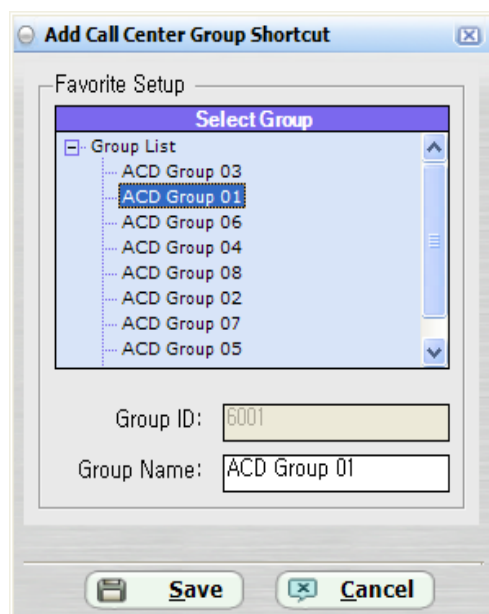
- 1) Right click on Agent icon and select **Remove Favorite** from the pop-up menu in the **Favorite Window**.
- 2) The agent is removed from the list.

7.3 Group

7.3.1 Add Group

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

- 1) Right click on the **Favorite view** and select **Add Group** from the pop-up menu in the **Favorite Window**.
- 2) The **Add Call Center Group Shortcut** dialog box is displayed.

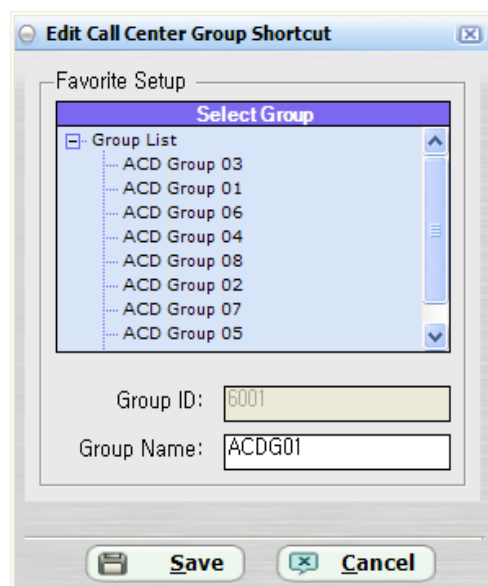


- 3) Select the Group from the **Select Group** section.
- 4) The corresponding **Group Number** and **Group Name** is displayed. The agent can change the **Group Name** if required.
- 5) Click **Save** to add the Group to the favorite list.

7.3.2 Modify Group

The **[Edit]** option allows editing select Group information.

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



- 4) Click **Save** to update the Group information.

7.3.3 Delete Group

The **[Delete]** option allows deleting the selected Group.

- 1) Right click on the Group icon and select **Remove Favorite** from the pop-up menu in the **Favorite Window**.
- 2) The Group is removed from the list.

7.4 Phone Number

7.4.1 Add Phone Number

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

- 1) Right click on the **Favorite view** and select **Add Phone Number** from the pop-up menu in the **Favorite Window**.
- 2) The **Add Phone Number Shortcut** dialog box is displayed.

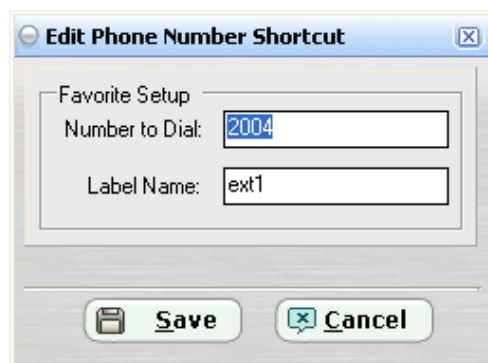


- 3) **Number to Dial**-Enter the Phone number.
- 4) **Label Name**-Enter the name to identify with the number.
- 5) Click **Save** to add the phone number to the favorite list.

7.4.2 Modify Phone Number

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

- 1) Right click on the **Favorite Phone Number** and select **Edit Favorite** from the pop-up menu 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.

7.4.3 Delete Phone Number

The **[Delete]** option allows deleting the selected phone number.

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

7.5 Call Favorite

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

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

7.6 Transfer to Favorite

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

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



NOTE

Transfer

For more information, see [Transfer to Agent](#) & [Transfer to Group](#) option.

7.7 Conference Favorite

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

- 1) Select an Agent/Phone number to conference.
- 2) Right click and select **Conference Favorite** from the pop-up menu 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.

CHAPTER 8. Group Stat Operations

This section describes the Group Statistics operations:

8.1 Group Stat Window

The [Group Stat] shows real time Group Statistics.

- 1) The selected Group Stat items and corresponding values for each Group to which the agent belongs and is currently logged in is displayed.

Call History	Call Buttons	Groups	Groups Stat	Favorite	
Group Name	Idle Agents	Break Agents	Busy Agents	Wait Calls	Longest Wait Time
ACD Group 01	0	1	0	0	00:00:00
ACD Group 02	0	1	0	0	00:00:00
ACD Group 03	0	1	0	0	00:00:00
ACD Group 04	0	1	0	0	00:00:00
ACD Group 05	0	1	0	0	00:00:00
ACD Group 06	0	1	0	0	00:00:00



NOTE

Group Stat Window

For more information, see [Group Stat Settings](#) option.

8.1.1 Group Parameters

Category	Description
Idle Agents	Total Number of agents with available status
Busy Agents	Total Number of agents with busy status
Break Agents	Total Number of agents with Break status
Wait Calls	Number of waiting calls
Longest Wait Time	Longest waiting time





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ABBREVIATION

A

ACD	Automatic Call Distribution
-----	-----------------------------

C

CIM	Customer Interaction Management
CLI	Calling Line Identification

D

DID	Dialed Number Identification
DND	Do Not Disturb



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ACD-Agent User's Guide

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