



together with **CS Comms**

Istra
version 9.1
ACD Console
Supervisor guide

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About this guide

The goal of this guide is to provide supervisors with the necessary procedure to run and enjoy the ACD console application.

The **ACD console** is a monitoring and management graphical application dedicated to supervisor.

The console is synchronized with Centile Istra platform and cannot be run on its own.

ACD Console overview

1.1 Introduction

The **ACD Console**, available in standalone and web modes, is a user-friendly Windows-based desktop application enabling Supervisors to monitor and manage agents and make sure client's calls are answered promptly.

To use the ACD Console, the Enterprise Administrator must have previously performed the following:

- create a set of agent user extension
- create overflow agents
- assign a device to each agent
- create supervisor extension
- assign a device to supervisor
- create calendars
- create ACD groups
- assign a PSTN number to each ACD groups

Please refer to the Call Center administrative guide 7.6 for details.

The **ACD Console** consists of:

- a setting area
- a management toolbar
- an agents and clients monitoring and management area
- a calendar
- a contacts list

The above areas will be detailed throughout the guide.

2.1 System requirement

To run **Centile ACD Console** application, you must have the following:

- Windows XP or Vista operating system
- At least 1Gb of RAM
- 200 MB of free disk space
- Macromedia Flash Player 10.0.22,87 or higher
- 10/100 Base-T Ethernet connection or WiFi

To connect to the **ACD Console**, the Enterprise Administrator must provide the Supervisor with the following information:

- Login (ext number)
- Password (ext number)
- Enterprise name
- Server name

Supervisor Administrative Tasks

3.1 Installing ACD Console

The ACD Console is a flash application. To run the ACD Console application, Adobe Flash Player 10.0.22.87 version (or higher) is required. Older version may affect the good behavior of the application.

To upgrade to a newer version, follow the installation procedure. Credential will not be lost when signing in.

Install the file **Setup-Centile-ACDConsole-x.x.x.exe** on the PC by clicking twice on the icon situated on your desktop.

The set up wizard window will open.



Figure 1 - Setup wizard

Click **Next** to continue.

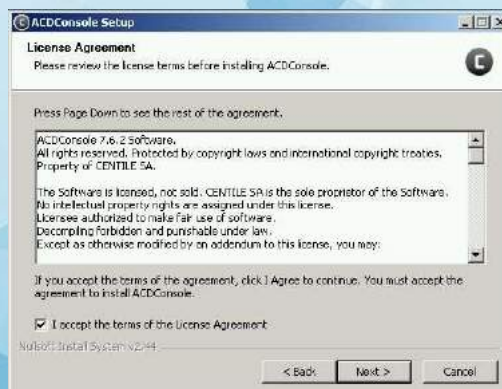


Figure 2 - License agreement

Accept the terms of the License agreement by ticking the box. Click **Next** to continue.

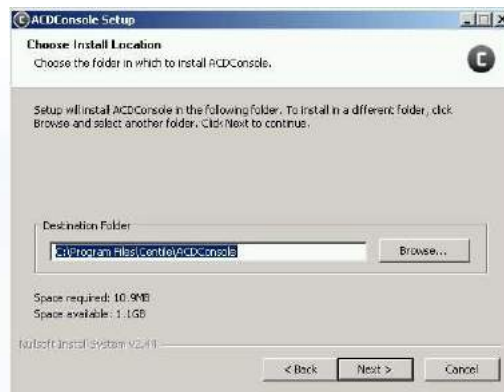


Figure 3 - Installation location

By default, the installation folder is **Program Files\Centile\ACDConsole**.

Click on browse if you wish to install ACD Console in a different folder.
Click Next to continue.

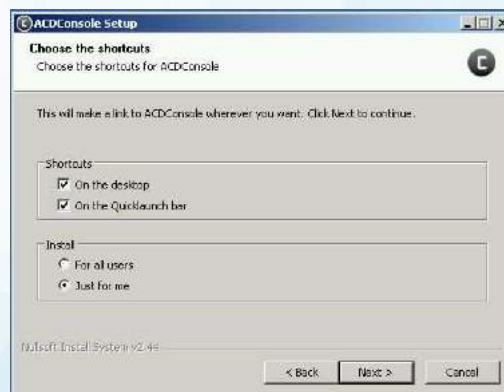


Figure 4 - Shortcuts

Select the shortcuts (available on the desktop, on the quick launch bar)
Click Next to continue.



Figure 5 - Start Menu Folder

Select from the list **the start menu folder** in which to create the program's shortcut. If the list of folders proposed is not suitable, enter a name to create a new folder.
Click Install to install ACD Console© on your computer.



Figure 6 - Completed ACD Console set up

By default, the tick in the box “run ACD Console” is automatically selected. Centile recommends deselecting the box and clicking **Finish** to close the wizard.

If “Run ACD Console” has been selected, then the application will launch itself automatically after clicking on the finish button. ACD Console settings window will appear.

4.1 Launching ACD Console

Once the ACD Console has been installed on the PC, the Supervisor is ready to launch the ACD Console application.

The ACD Console application can be launched from different places such as:

- **Desktop and Quick launch shortcuts**
- **Start Menu** (from **Program Files/Centile/ACDConsole**)



Figure 7 - Desktop and Quick launch Shortcuts

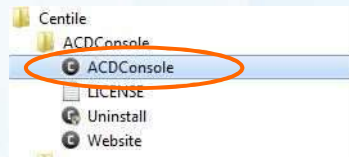


Figure 8 - Start Menu

5.1 Signing in ACD Console

To connect to the ACD console, the supervisor must enter the following information:

- The **login** (extension # previously set by the enterprise administrator when creating the user)
- The **password** (usually the same as the one to check voicemails)
- **Tick the box** "auto login" – optional
- The **host name (the enterprise name)**
- The **server name** of your provider. This is the address used to connect your ACD Console to provider's Istra platform

Note: The server name and enterprise name are provided by your Enterprise administrator.

In the example below, The Supervisor's ext # is 101.

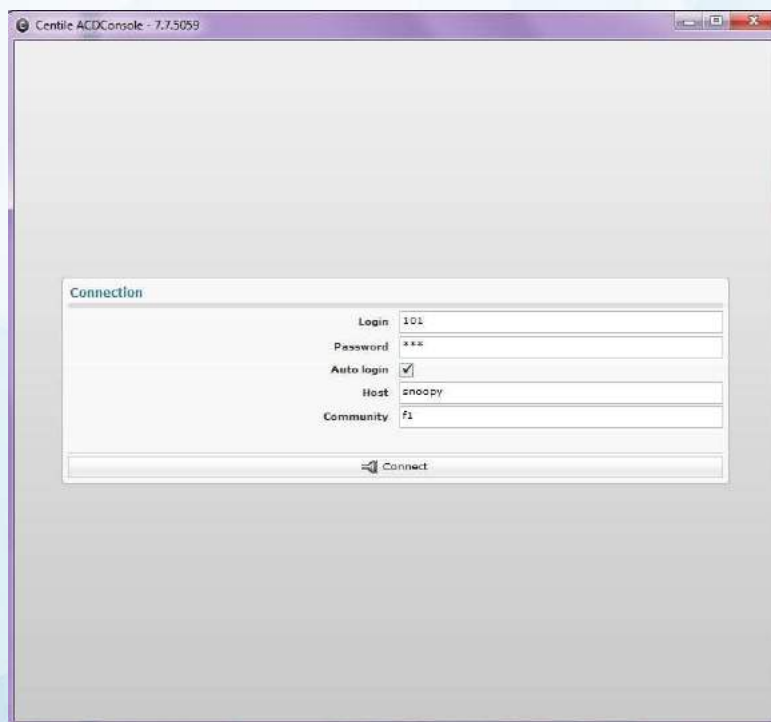


Figure 9 - ACD Console login interface

Click Connect. This will open the session window.

2.4 Uninstalling ACD Console

If you wish to uninstall the ACD Console, please follow instructions below:

Close the ACD Console application.

From the **Start Menu**, go to **Program Files/Centile/ ACD Console** and then click **Uninstall**. The uninstall **ACD Console** wizard window will open.

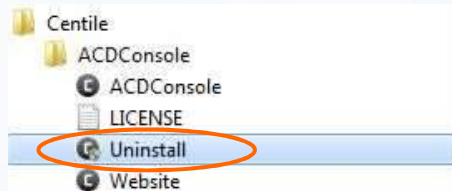


Figure 10 - Uninstalling ACD Console



Figure 11 - Uninstalling ACD Console Wizard

Click Next to continue. This will open the uninstall location window.

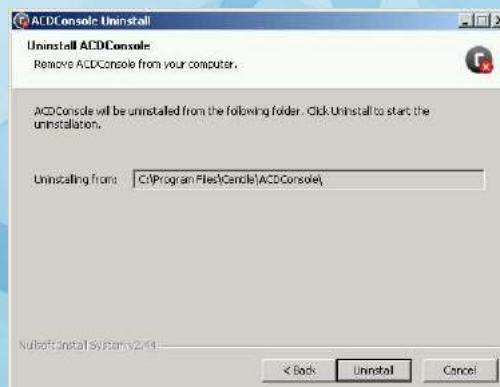


Figure 12 - Uninstalling ACD Console location

Click **Uninstall**. This will open the Uninstall completion window.

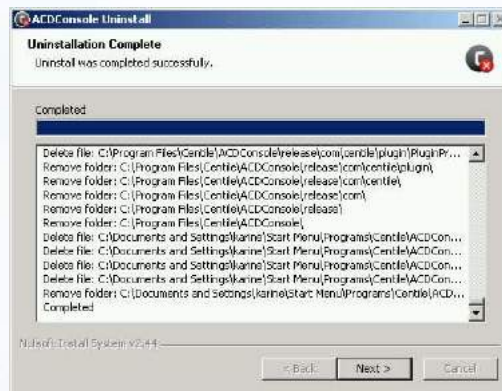


Figure 13 - Uninstalling ACD Console completion

Click **Next** to finish the un-installation process.



Figure 14 - Successful Uninstallation

Click **Finish** to remove definitively the ACD Console application from your PC.

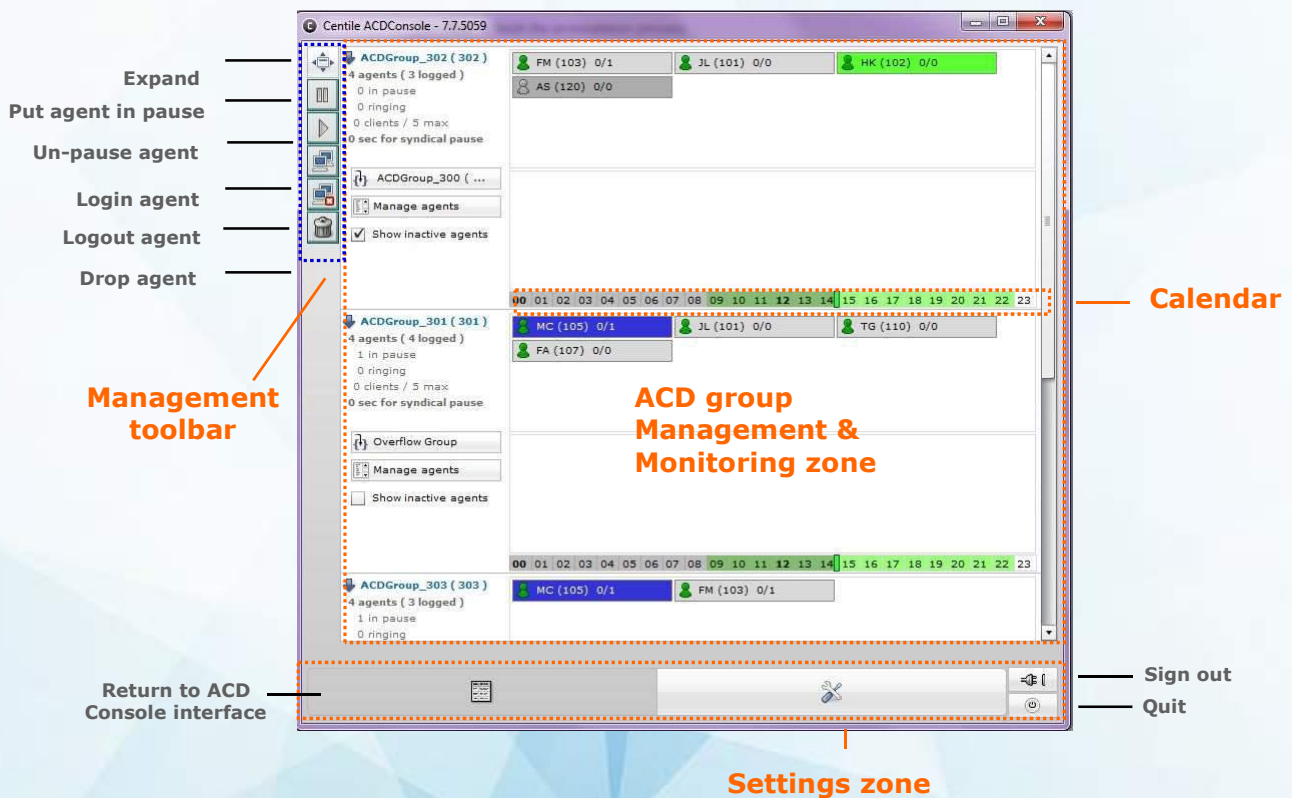
Understanding the ACD Console

6.1 ACD Console interface

The ACD Console is composed of the following zones:

- Settings zone
- Management toolbar
- ACD group Management and Monitoring zone (agents and clients)
- Calendar (opening and closing hours)

Figure 15 ACD Console home page overview



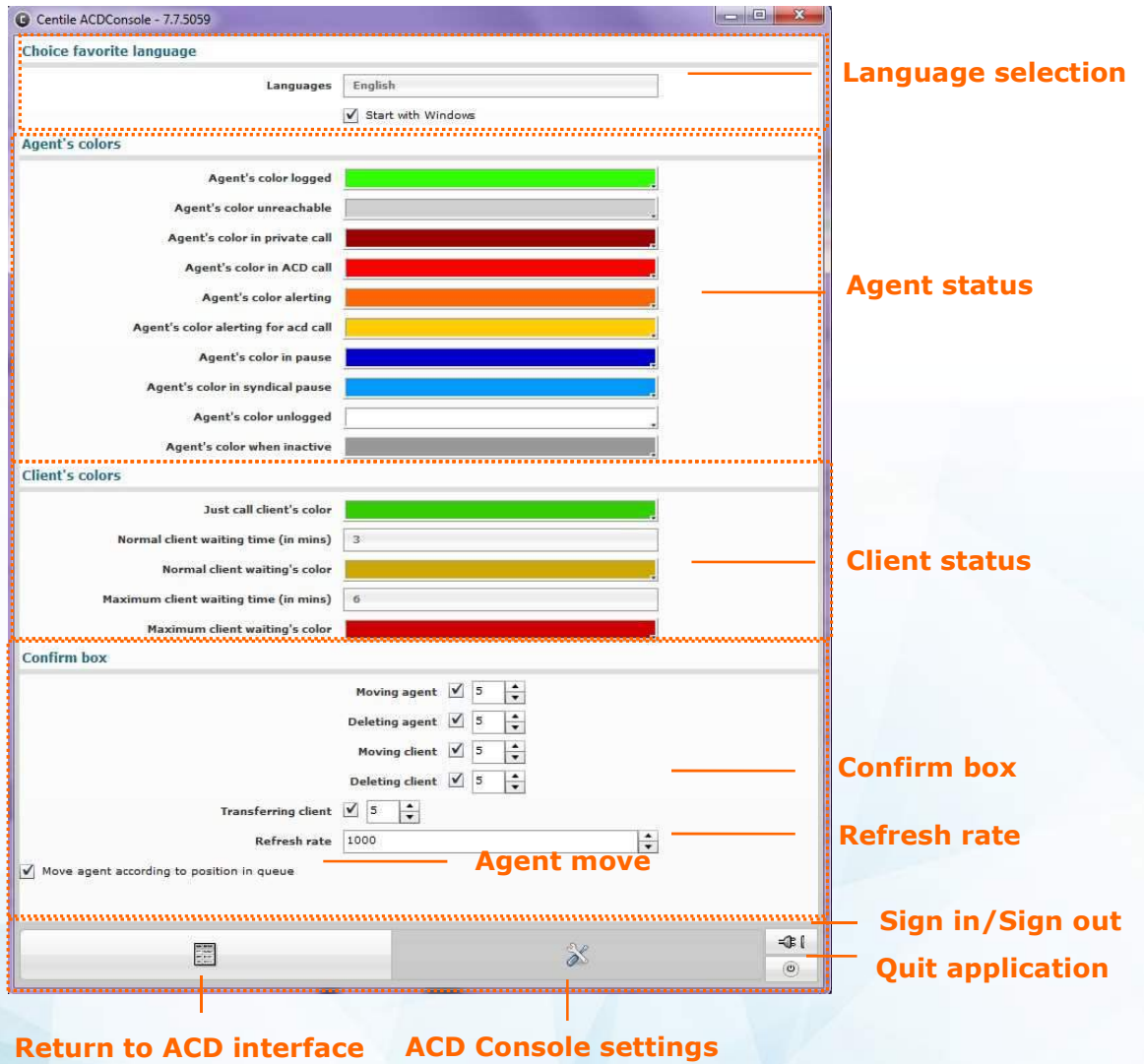
Settings zone

The settings zone allows the supervisor to manage the ACD Console's settings:

- Language selection
- Agent's status (colored icons)
- Client waiting time status (colored icons)
- Confirm box for specific actions (move, delete agents and clients....)

Click on the settings icon  to open the settings window.

Figure 16 Settings overview



Language settings

The supervisor is able to choose the language of the application and decide whether to start it when launching windows.

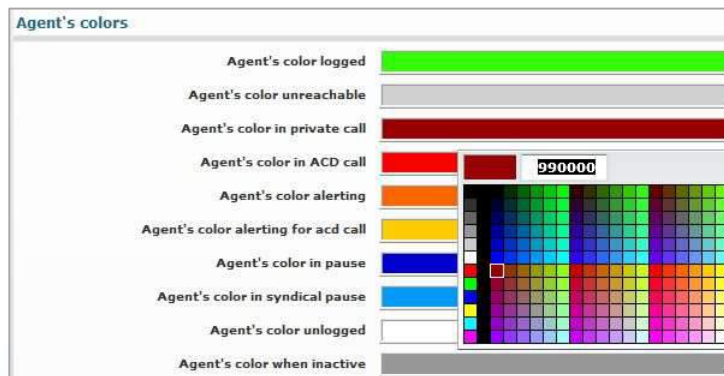
Figure 17 Language



Agent status settings

The ACD Console enables the supervisor to monitor agents. The agent's status is defined per color. The supervisor can at any time change the color of the agent's status..

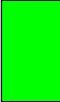









Figure 18 Color of Agent status



To change the color corresponding to the agent's status, click on the color icon. The available colors will be displayed.

Select the chosen one. The color will be automatically applied to the status.

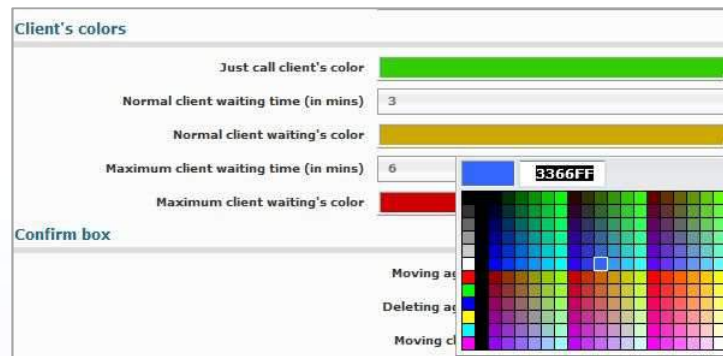
In the example below, agent's status has been set as follow:

	Agent's color logged	Agent is logged and available to answer calls (private and ACD)
	Agent's color unreachable	Agent is logged but his device is disconnected
	Agent's color in private call	Agent is on line with a client who called his ext # direct and didn't call the ACD group ext #
	Agent's color in ACD call	Agent is on line with a client who called the ACD group ext #
	Agent's color alerting	Agent ext # is ringing (in the case of private calls)
	Agent's color alerting for ACD call	Agent ext # is ringing and is prioritized for an ACD call (over private call)
	Agent's color in pause	Agent is logged but in pause (on lunch, away from his desk.....)
	Agent's color in syndical pause	Agent is logged, ready to answer the next call but in syndical pause (delay authorized for the agent in answering the next call)
	Agent's color unlogged	Agent is unlogged
	Agent's color when inactive	Agent is free to take a call.

Client status settings

The ACD Console enables the supervisor to keep an eye on clients and make sure their calls are answered within the shortest deadline. The client's status is defined per color. The supervisor can at any time change the client's status color and their associated waiting time (length of time the client has to wait for the call to be answered). Changes will take effect immediately.

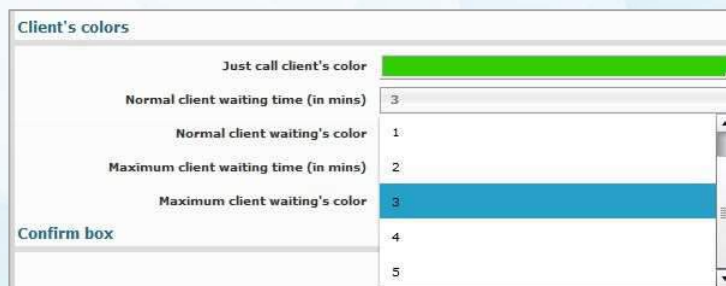
Figure 19 Client color status



To change the color corresponding to the client's status, click on the color icon. The available colors will be displayed.

Select the chosen one. The color will be automatically applied to the status.

Figure 20 Client waiting time setting



A waiting time (in minute) has been associated to the waiting client color status.

To change the waiting time (normal and max), click on the figure icon. 59 minutes waiting time can be shared between normal and max with a maximum of 5 minutes available for the normal waiting time.

The normal waiting time is set from 1 minute to 5 minute

The maximum waiting time is set from the following number until 59

Select the chosen minute. The new waiting time will be automatically applied.

Note: if the supervisor sets the normal time to 3 minutes, the long waiting time setting will be between 4 and 59.

In the example below, client and waiting time's color status have been set as follow:

	Client's color	Enables supervisor to have a view of online dealt clients. Color status can be changed at any time.
	Normal waiting deadline (in mins) for client's call to be answered	Enables supervisor to have a view of client's waiting time status. In this example, it has been set to 3 minutes.
	Maximum waiting deadline (in mins) for client's call to be answered	Enables supervisor to have a view of clients waiting time status. In this example, it has been set to 6 minutes.

Confirm box settings

The ACD Console enables the supervisor to monitor and manage agents and clients as well as to define the length of time the confirmation box will stay on the screen before a specific action is made.

Figure 21 Confirm box setting

Actions include:

- **Moving agent:** the supervisor can move agents from one ACD group to another (drag & drop or mouse click)
- **Deleting agent*:** the supervisor can remove agents from one ACD group (drag & drop or mouse click)
- **Moving client:** the supervisor can move clients from one ACD group to another (drag & drop or mouse click)
- **Deleting client:** the supervisor can remove clients (drag & drop or mouse click)
- **Transferring client:** the supervisor can transfer clients to an agent

** Deleting an agent means removing an agent from an ACD group session. This does not prevent the agent to receive private calls. The supervisor can at any time add the same agent to the same or different ACD group. Agents are removed from the ACD screen display but are still visible in the contact list ready to become an active agent again.*

To enable/disable the action, tick/untick the relevant box

- **Refresh rate:** the screen refresh rate has been set to 1000 milli seconds = 1 second meaning that any changes performed will be effective within 1 second.

To change the refresh rate with a maximum of 5000 milli seconds, use the up and down arrow.

- **Agent's move enable:** the supervisor can move an agent from one ACD to another according to his position in the queue.

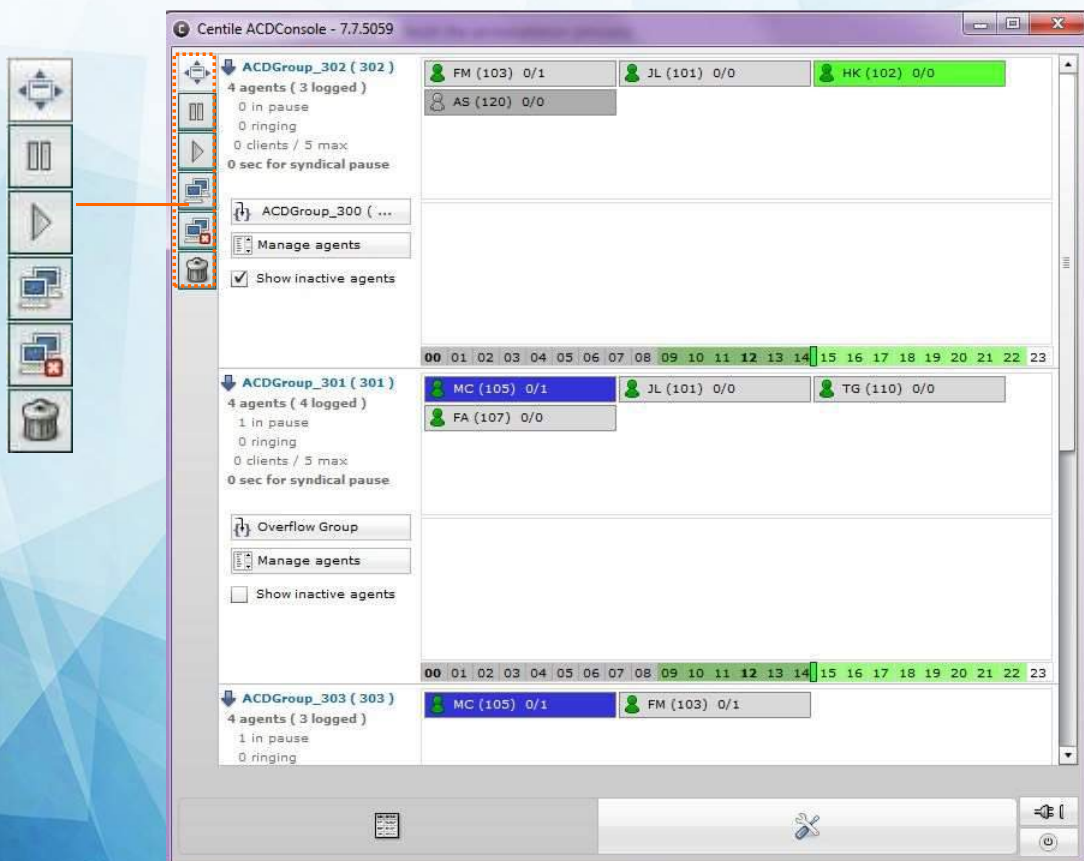
To enable/disable the move of agent according to position in queue, tick/untick the relevant box.


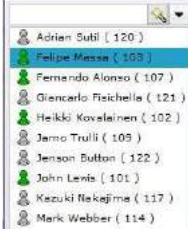







Management toolbar

The management tool enables the supervisor to manage agents, clients and contacts from the directory and perform the following actions:

- expand in order to view and search agents in the directory
- login agent to ACD group (logout agent from ACD group)
- put agent in pause
- un-pause agent
- remove agent from ACD group
- drop a client
- transfer client to another group

Figure 22 Management toolbar



	<p>The expand button allows the Supervisor to have a view of all agents.</p> <p>Click on the expand button to have a view of all agents.</p>  <p>To search for agents, enter a name or letters in the search box</p>  <p>To sort agents in alphabetic order (a-z and z-a), click on the arrow </p>
	<p>The pause button allows the supervisor to put an agent in pause status. The agent will therefore be enabled to take any calls.</p> <p>Select the agent you wish to put in pause, and click on the pause button.</p>
	<p>The un-pause button allows the supervisor to take an agent from his pause and make him available to answer calls.</p> <p>Select the agent you wish to un-pause and click on the un-pause button.</p>
	<p>The login button allows the supervisor to connect an agent to an ACD group.</p> <p>Highlight the agent to be connected and click on the login button.</p>
	<p>The logout button allows the supervisor to disconnect an agent from an ACD group.</p> <p>Highlight the agent to be disconnected and click on the logout button.</p> <p>Disconnected agents are viewed from the directory.</p>
	<p>The drop button allows the supervisor to remove an agent or client from the ACD group.</p> <p>Highlight the agent/client to be removed and click on the drop button.</p> <p>The agent no longer appears in the ACD group but is still registered as an agent.</p> <p>At any time, the supervisor can connect the agent to an ACD group.</p>

ACD group Management and Monitoring zone

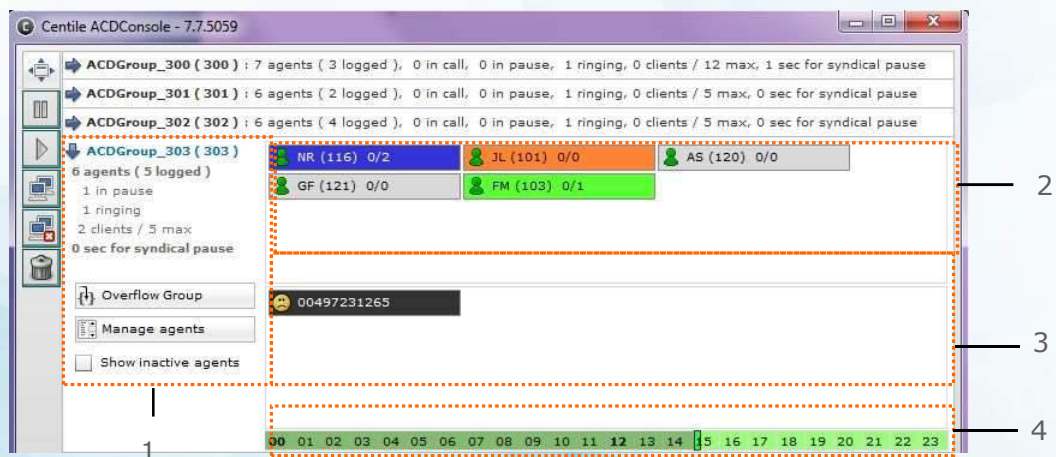
The ACD group Management and Monitoring zone enables the supervisor to have a view of the following:


- agents ID (name and ext#)
- agents' status (logged, in pause, alerting, ...)
- clients' status and tel number
- time line (opening and closing hours of call center/hotline)

The ACD group Management and Monitoring zone allows the supervisor to perform the following actions:

- drag and drop an agent from the directory into one or multiple ACD groups
- add an ACD group as overflow group
- remove an agent from a given ACD group
- remove a waiting client from a given ACD group
- drag and drop an agent from one ACD group to another
- drag and drop a waiting client from an ACD group to another
- transfer a waiting client to an agent from the directory
- answer to the waiting client if all agents are busy (must be declared as agent)
- duplicate an agent to be available in different ACD groups

Figure 23 Detailed ACD group zone



Note: Clicking on the  enables the supervisor to hide the ACD group of agents and clients in details.

The ACD group Management and Monitoring zone is divided into 4 parts:

1. Brief information about the ACD group (Monitoring area)

- Number of agents in the group
- Status of each one (logged, in call, ringing, in pause...)
- Number of clients calling the group
- Number maximum of clients in a queue
- The syndical pause (length of time for agent to answer another call)

The supervisor is also able to manage:

- Overflow group management
- Agent management
- Show/Hide inactive agents

2. Detailed information about the agents

- Status of agent representing by a color – please refer to **figure 18**
- Detailed view of the agent's status when pointed the mouse on the agent

Figure 24 Agent status








Agent John Lewis ext # 101 status is ringing (color set is orange)

When pointing the mouse on the agent, the supervisor is able to see a detailed view of his status as follows:

- John Lewis, ext # 101 is ringing and is in ACD call (compared to private call)
- John Lewis is on an ACD call with a client whose telephone n° is 04 89 87 9137
- He took the call at 16.06.22 on 23/07/2012
- John Lewis is logged since 19/07/2012 at 13.49.47
- John Lewis didn't miss any calls
- John Lewis has never been in an unreachable state

Figure 25 Agent status color





	Agent's color logged	Agent is logged and available to answer calls (private and ACD)
	Agent's color unreachable	Agent is logged but his device is disconnected
	Agent's color in private call	Agent is on line with a client who called his ext # direct and didn't call the ACD group ext #
	Agent's color in ACD call	Agent is on line with a client who called the ACD group ext #
	Agent's color alerting	Agent ext # is ringing (in the case of private calls)

	Agent's color alerting for ACD call	Agent ext # is ringing and is prioritized for an ACD call (over private call)
	Agent's color in pause	Agent is logged but in pause (on lunch, away from his desk.....)
	Agent's color in syndical pause	Agent is logged, ready to answer the next call but in syndical pause (delay authorized for the agent in answering the next call)
	Agent's color unlogged	Agent is unlogged
	Agent's color when inactive	Agent is free to take a call.

3. Information about the clients

The client's status varies depending on the waiting time.

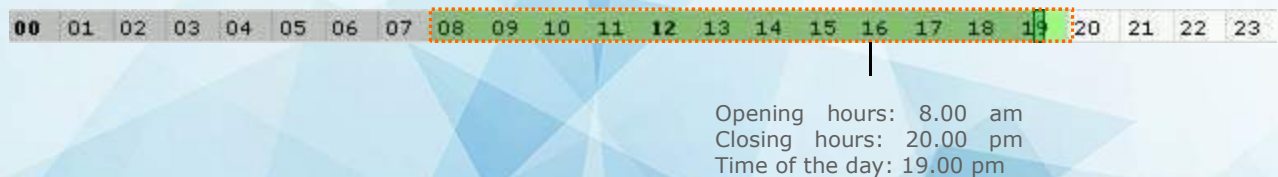
Figure 27 Client status

 00497231287 00497231287 In queue since: 22/04/2009 17:24:52 Duration: 00:00:02 	The client is recent in the queue and the waiting time is less than 3 min (since 2 sec in the example).
 00616345969	The client is in a queue and the waiting time is more than 3 mins and less than 6 mins
 00497231265	The client is in a queue and the waiting time is more than 6 mins

4. Information about the calendar

The timeline represents the opening and closing hours of the call center/hotline. Calendar setup can be done from web admin by the operator or from Web interface myCallCenter by enterprise administrator or supervisor.

Figure 28 Calendar



Supervisor Management Tasks

7.1 Agent management

The Supervisor is entitled to perform the following actions:

- add an agent from the contact list into a group of agents
- login an agent
- logout an agent
- put an agent in pause
- un-pause an agent
- remove an agent from an ACD group
- move an agent from an ACD group to another
- duplicate an agent already in an ACD group to another ACD group
- define an overflow Group

Adding an agent from the contact list to an ACD group

The Supervisor is allowed to add to ACD groups as many agents from the contact list as requested.

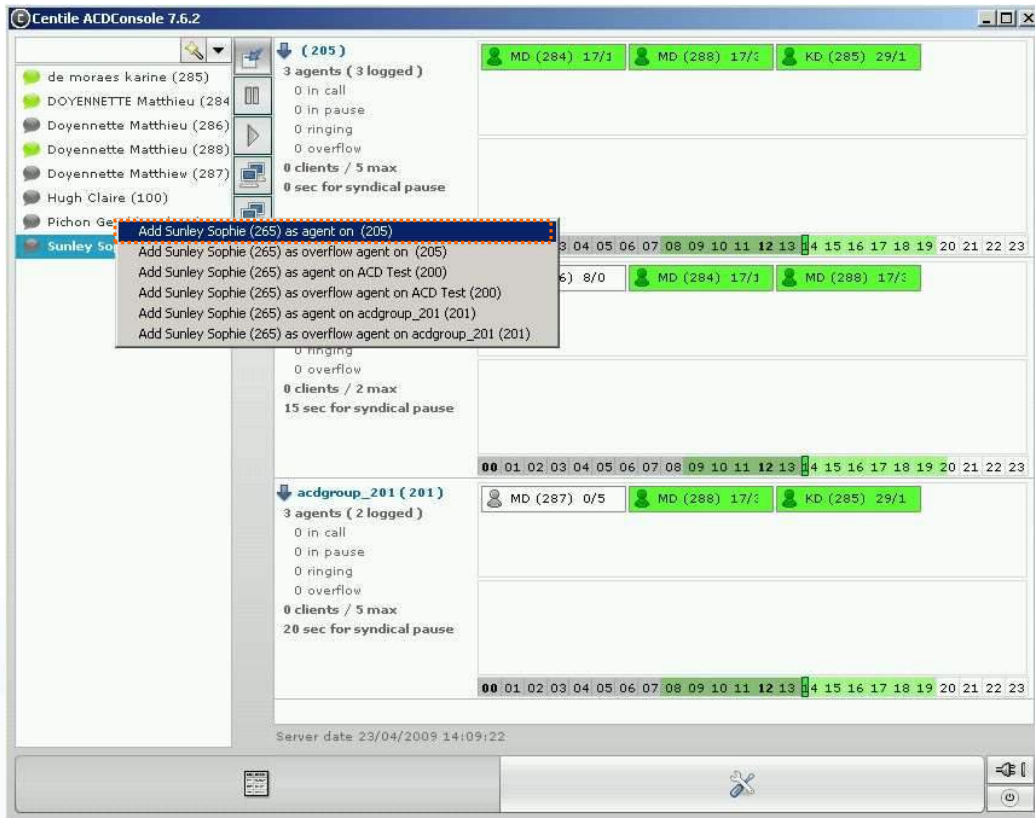
There are 2 possible ways:

right clicking on the agent from the contact list and selecting the ACD group destination

- drag and drop the agent from the contact list to an ACD group

In the examples below, the Supervisor is adding the agent “Sophie Sunley ext # 265” to the ACD group 205.

Figure 29 Add agent from contact list to an ACD group – right clicking (1/2)



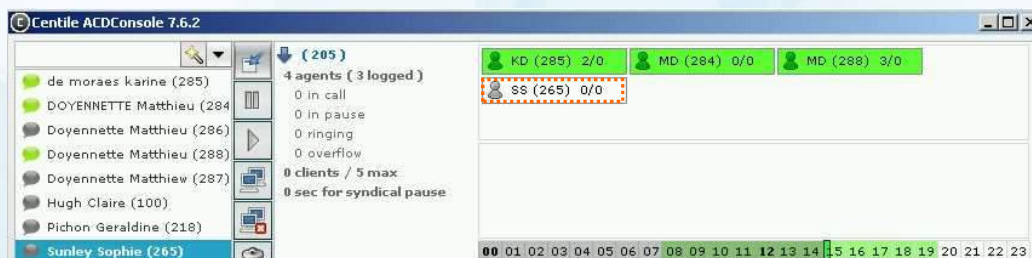
Click on the expand button  to open the contact list.

Right click the agent. This will open the action window.


Select the action

Click on selected action to confirm

Figure 30 Add agent from contact list to an ACD group – right clicking (2/2)



The agent has been added to the ACD group 205. His status is set to unlogged.

To login the agent, rick click on the agent and select login agent . The color status will become green.


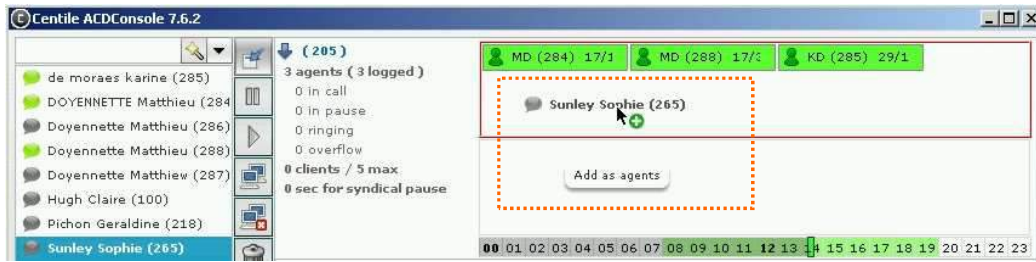
The Supervisor can also drag and drop the agent to be logged in in  the login agent box

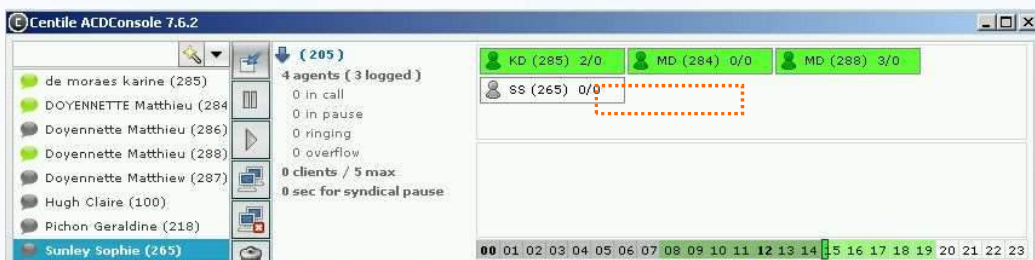
Figure 31 Add agent from contact list to ACD group – drag and drop (1/2)



Select the agent to be added to the ACD group 205

Drag and drop to group 205.

Figure 32 Add agent from contact list to ACD group – drag and drop (2/2)



The agent has been added to the ACD group 205.

The Supervisor must login the agent for him to be operational – please refer to section 4.2.3 Login/logout an agent.

Login an agent

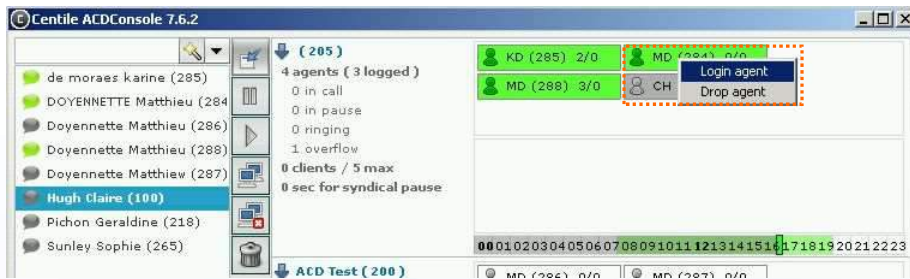
Once the Supervisor has added agents to an ACD group, he must log them in for them to be operational.

There are 2 possible ways:

- right clicking on the agent
- drag and drop the agent

In the example below, the Supervisor must login the agent “Claire Hugh ext # 100” from ACD group 205 in order for her to be operational.

Figure 33 Login an agent – right click (1/2)



Right click on the agent.

Select login agent. The color status of the agent will become green (please refer to color code).

Figure 34 Login an agent – right click (2/2)

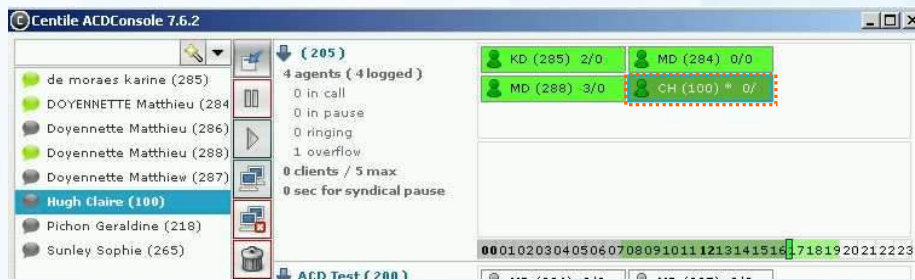
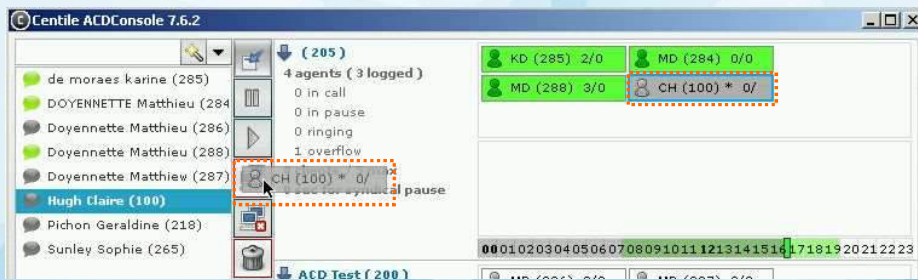



Figure 35 Login an agent from a group – drag and drop (1/2)



Select the agent to be logged in

Drag and drop the agent on login box 

The agent will automatically be logged in.

Figure 36 Login an agent from a group – drag and drop (2/2)



The agent is logged in. His status color is set to green (logged in overflow mode)

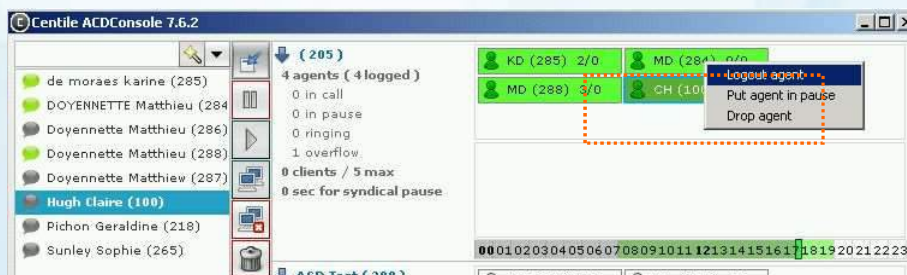
Logout an agent

The Supervisor is enabled to logout an agent. There are 2 possible ways:

- right clicking on the agent
- drag and drop the agent

In the example below, the Supervisor wants to logout the agent “Claire Hugh ext # 100” belonging to ACD group 205.

Figure 37 Logout an agent – right click (1/2)



Right click on the agent.

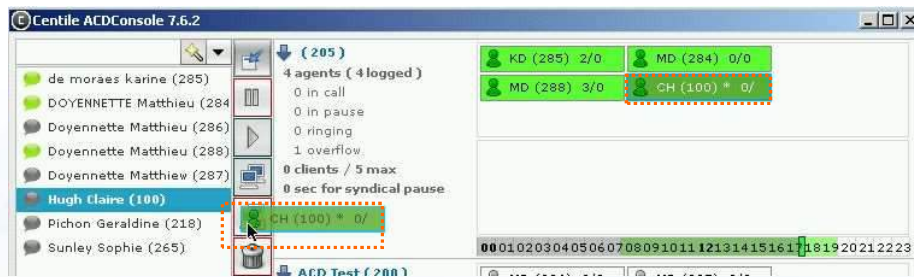
Select logout agent. The agent will automatically be logged out.

Figure 38 Logout an agent – right click (2/2)



The agent is logged out. The color status of the agent is grey (please refer to color code).

Figure 39 Logout an agent from a group – drag and drop (1/2)



Select the agent to be logged out

Drag and drop the agent to logout box . The agent will automatically be logged out.

Figure 40 Logout an agent from a group – drag and drop (2/2)



The agent is logged out. His status color is set to grey (please refer to color code)

Please note: **If the Supervisor logs out an agent during an ACD call**, the new agent's status will only take effect when ending the conversation with a customer.

The agent' status color will change. Please refer to 4.1.2 ACD group Management and Monitoring zone for color details.

Putting an agent in pause

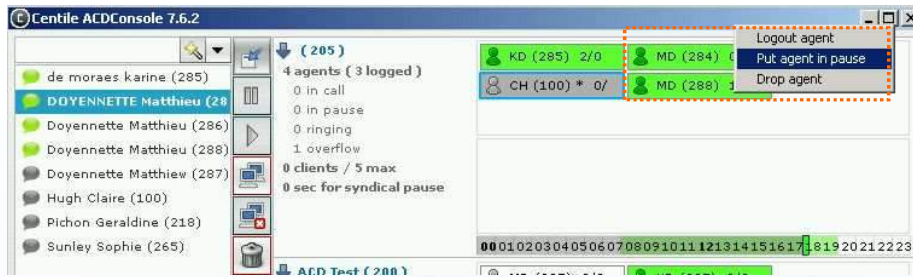
The Supervisor is enabled to put an agent in pause (lunch break, away from his desk.....)

There are 2 possible ways:

- right click on the agent
- drag and drop the agent

In the example below, the Supervisor wants to logout the agent “Matthieu Doyennette ext # 284” belonging to ACD group 205.

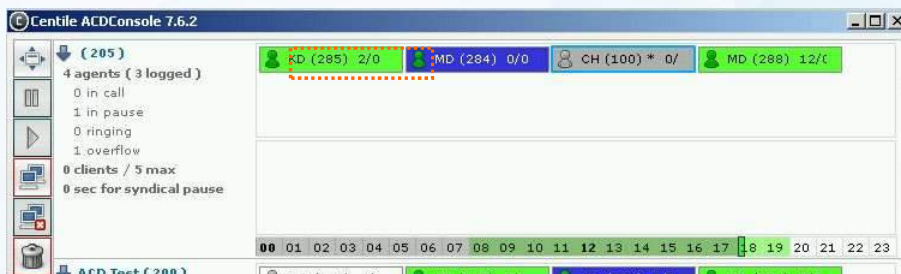
Figure 41 Put an agent in pause – right click (1/2)



Right click on the agent.

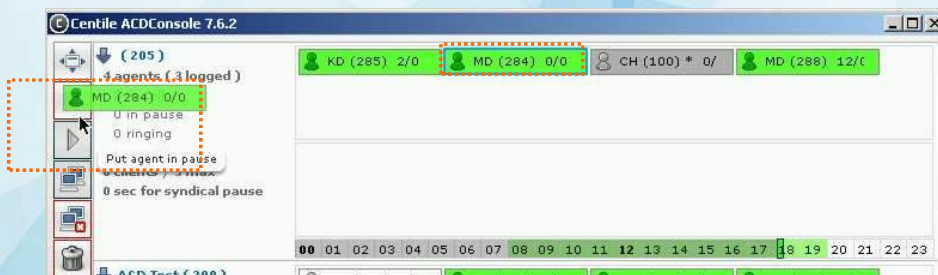
Select pause agent. The agent will automatically be put in pause.

Figure 42 Put an agent in pause – right click (2/2)



The agent Matthieu Doyennette ext # 284 is on pause. His status color is set to blue (please refer to color code)

Figure 43 Put an agent in pause – drag and drop (1/2)



Select the agent to be put in pause.


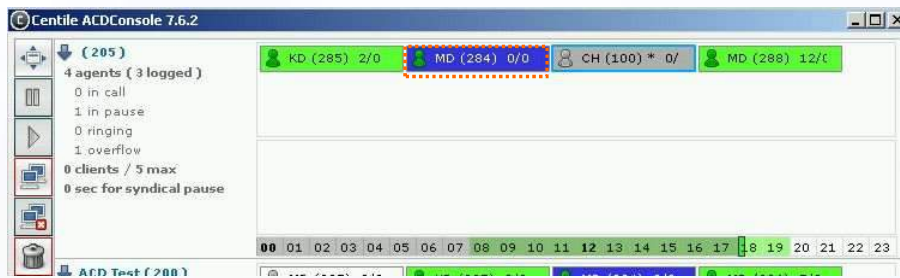
Drag and drop the agent to the put agent in pause  The agent will automatically be in pause.

Figure 44 Put an agent in pause – drag and drop (2/2)



The agent Matthieu Doyennette ext # 284 is in pause. His status color is set to blue (please refer to color code)

Please note: If the Supervisor put an agent in pause during an ACD call, the new agent's status will take effect when ending the conversation with the customer.

The agent' status color will change. Please refer to 4.1.2 ACD group Management and Monitoring zone for color details.

Un-pausing an agent

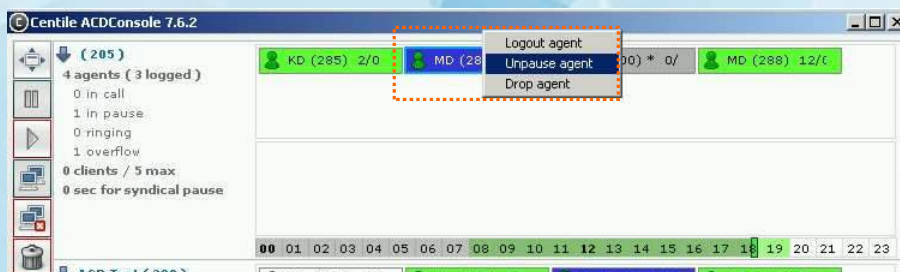
The Supervisor is enabled to remove an agent from his pause (lunch break, away from his desk.....)

There are 2 possible ways:

- right click on the agent
- drag and drop the agent

In the example below, the Supervisor wants to remove from his pause the agent “Matthieu Doyennette ext # 284” belonging to ACD group 205.

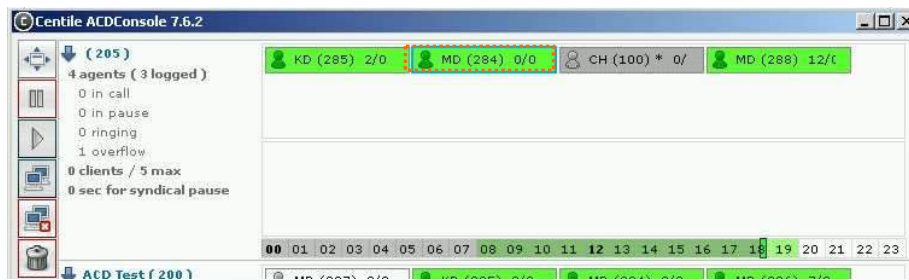
Figure 45 Un-pause an agent– right click (1/2)



Right click on the agent.

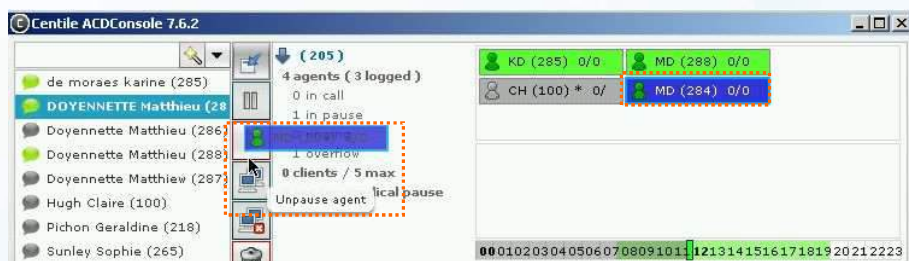
Select unpause agent. The agent will automatically be removed from his pause.

Figure 46 Un-pause an agent – right click (2/2)



The agent Matthieu Doyennette ext # 284 is un-paused and ready to answer calls. His status color is set to green (please refer to color code)

Figure 47 Un-pause an agent – drag and drop (1/2)



Select the agent to be removed from his pause.


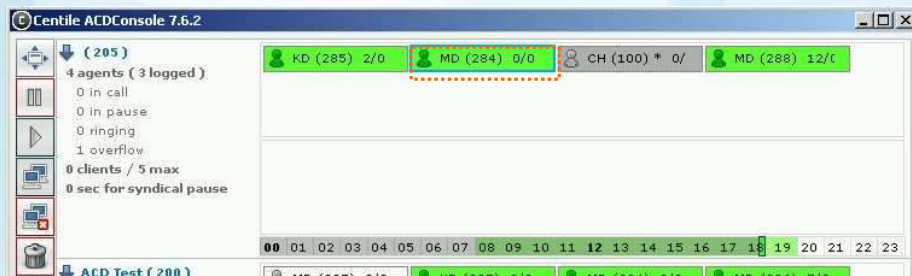
Drag and drop the agent to the un-pause agent box . The agent will automatically be removed from his pause.

Figure 48 Un-pause an agent– drag and drop (2/2)



The agent Matthieu Doyennette ext # 284 is un-paused and ready to answer calls. His status color is set to green (please refer to color code)

Removing an agent from an ACD group

The Supervisor is allowed to remove from ACD groups as many agents as requested.

There are 2 possible ways:

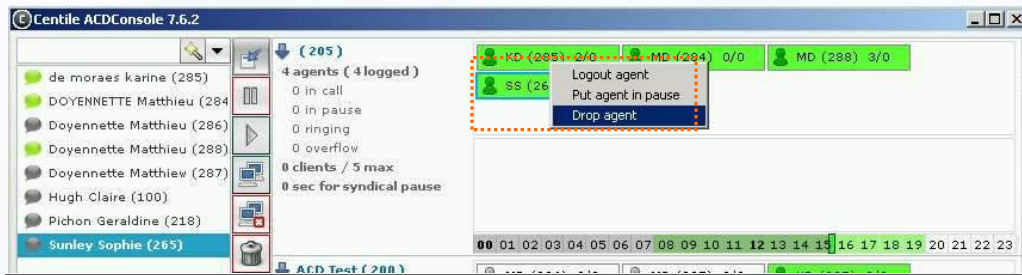
- right click on the contact
- drag and drop to the dustbin

In the examples below, the Supervisor is removing the agent “Sophie Sunley ext # 265” from the ACD group 205.

Please note:

Once removed from the ACD group, the agent will remain an agent and will still be available in the contact list ready to become an agent again.

Figure 49 Remove an agent from a group – right click (1/2)



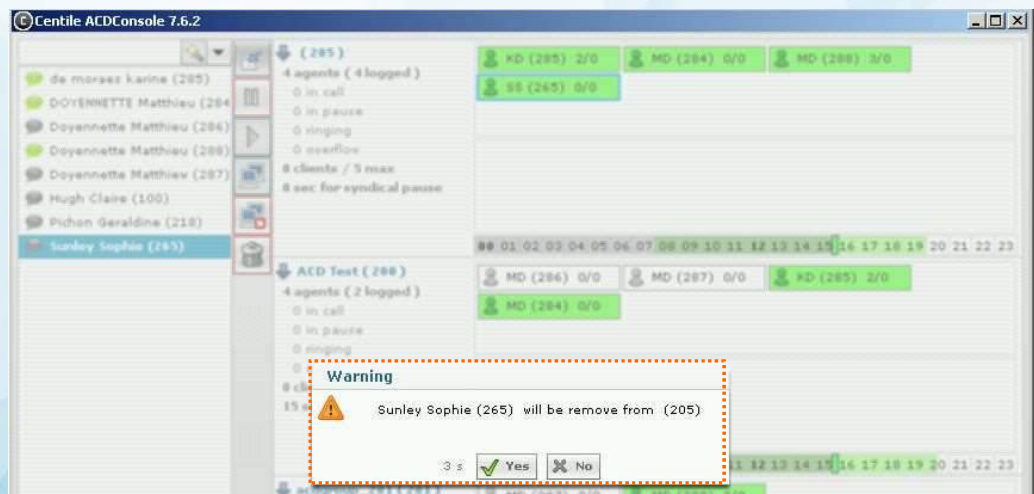
Select the agent to be removed.

Right click the mouse.

Select “Drop agent”. This will open the confirm box.

The agent has been removed from the ACD group 205 (but is still available in the contact list)

Figure 50 Remove an agent from a group – right click (2/2)

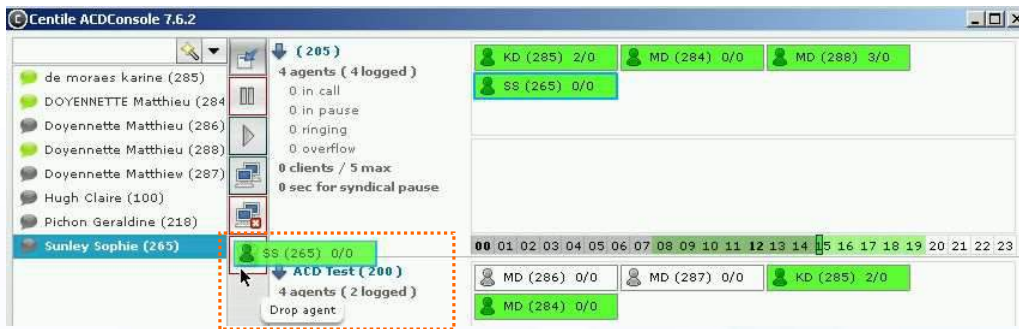


Select yes to remove the agent or wait until the timer (set to 5 seconds) is due.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The deletion of an agent has been set to 5 seconds, meaning that if the Supervisor doesn't press “Yes”, the action to delete will be performed after 5 seconds.

Figure 51 Remove an agent from a group – drag and drop (1/2)



Select the agent to be removed.


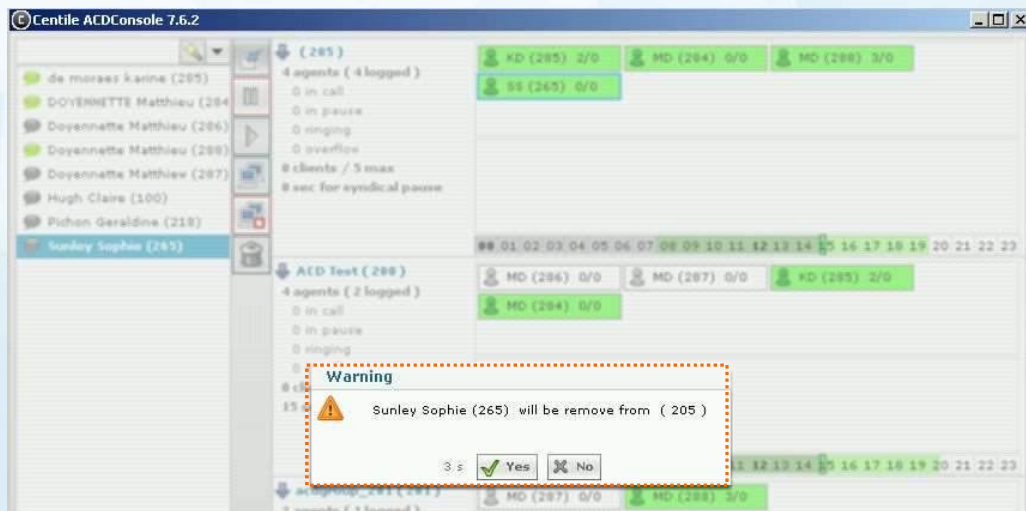
Drag and drop the agent to the drop box . This will open the confirm box.

Figure 52 Remove an agent from a group – drag and drop (2/2)



Select yes to remove the agent or wait until the timer (set to 5 seconds) is due.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The deletion of an agent has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to delete will be performed after 5 seconds.

If the Supervisor decides to remove an agent during an ACD call, the new agent's status will take effect when ending the conversation with the customer.

The agent's status color will change. Please refer to 4.1.2 ACD group Management and Monitoring zone for color details.

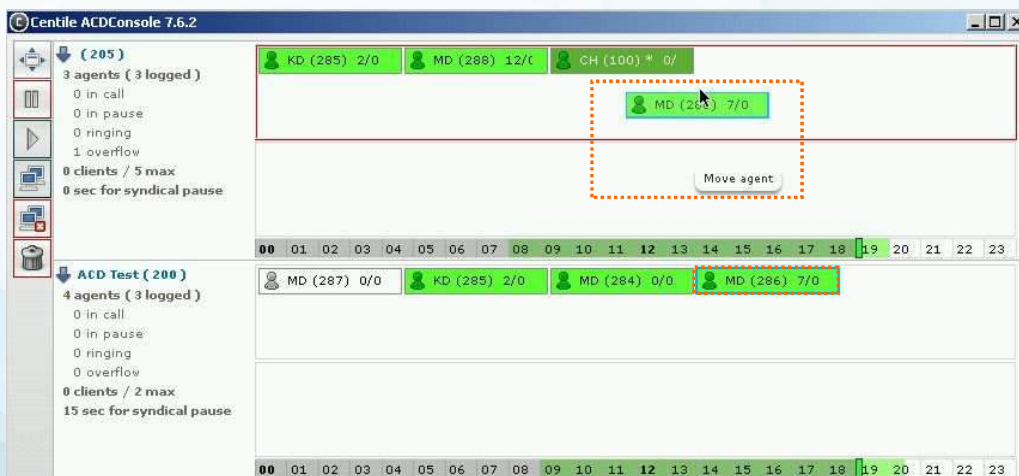
Moving an agent from an ACD group to another

Based on drag and drop mode, the Supervisor is enabled to move an agent from a group to another.

In the example below, the Supervisor is moving the agent ext # 286 from Group 200 to Group 205.

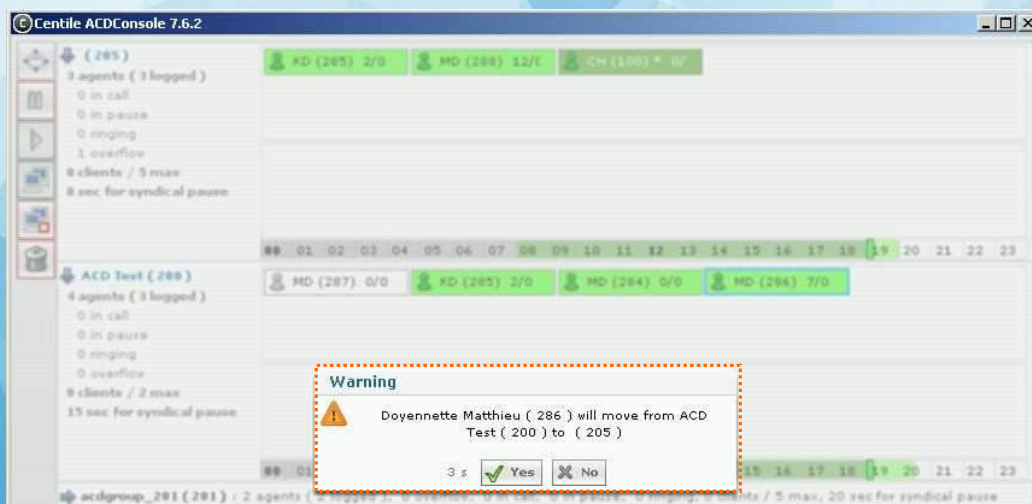
Please note: The move of one agent is impossible if action is performed out of office hours.

Figure 53 Move an agent from a group to another (1/3)



Select the agent to be moved.
Drag and drop the agent in the chosen group. This will automatically move the agent to the new group.

Figure 54 Move an agent from a group to another (2/3)



Select yes to move the agent from ACD group 200 to 205 or wait until the timer (set to 5 seconds) is due.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The move of an agent has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to move will be performed after 5 seconds.

Figure 55 Move an agent from a group to another (2/3)



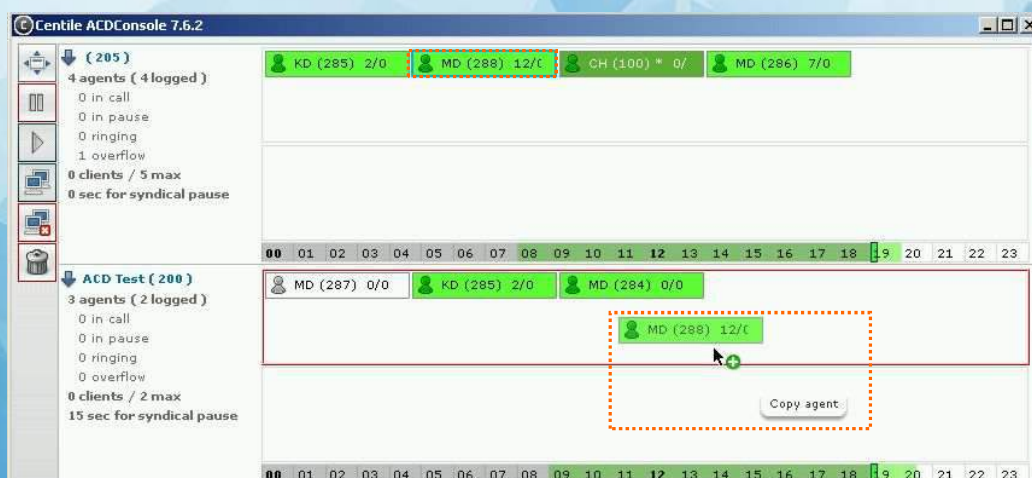
The agent previously belonging to Group 200 has been appointed to Group 205.

Duplicating an agent to another ACD group

The Supervisor is enabled to duplicate an agent in order for him to belong to 2 groups at the same time.

In the example below, the Supervisor is duplicating the agent MD288 from ACD group 205 to ACD group 200.

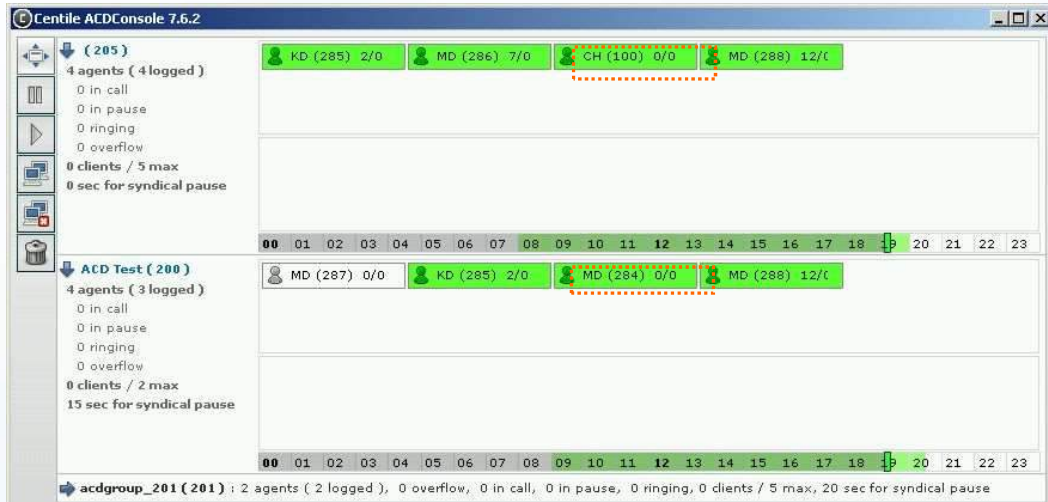
Figure 56 Duplicate an agent already in a group to another group (1/2)



Hold the Ctrl key down and select the agent to be duplicated.

Drag and drop the agent in the chosen group.

Figure 57 Duplicate an agent already in a group to another group (2/2)



The agent MD288 now belongs to ACD group 205 and ACD group 200.

Define an overflow Group

The supervisor is enabled to define an overflow Group when all agents of a first Group are not available. In this case, a waiting client will automatically and immediately be passed in the overflow group queue.

Figure 63 Define overflow Group 1/2

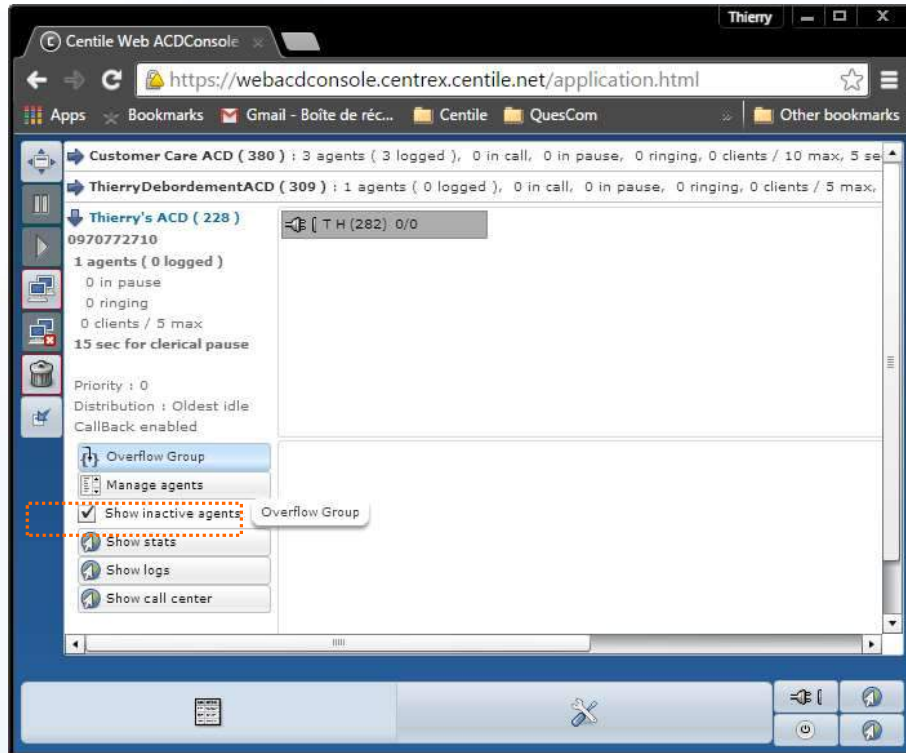


Figure 64 Define overflow Group 2/3

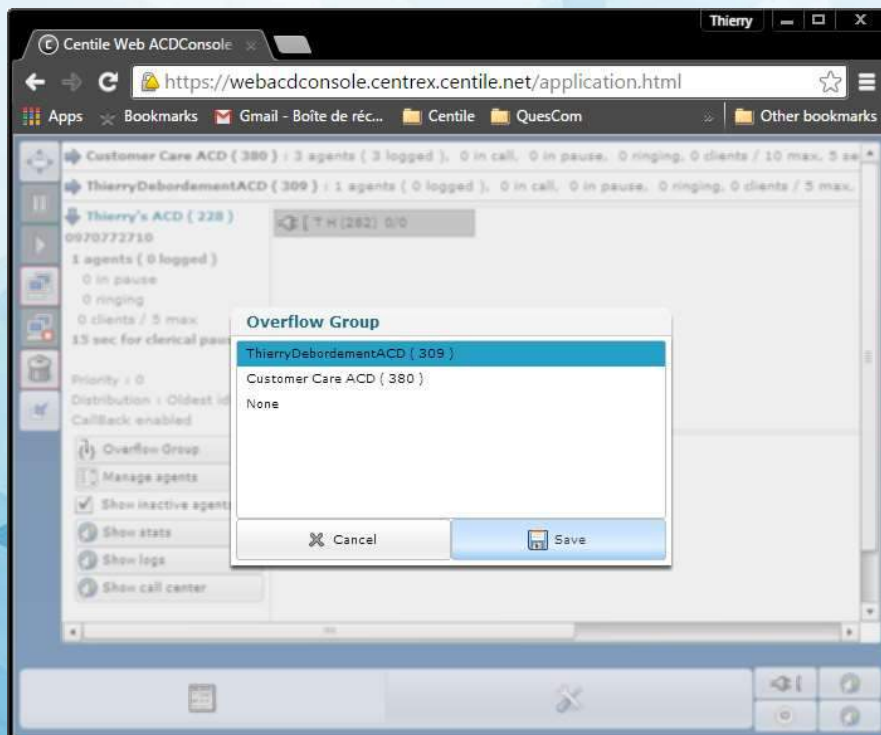
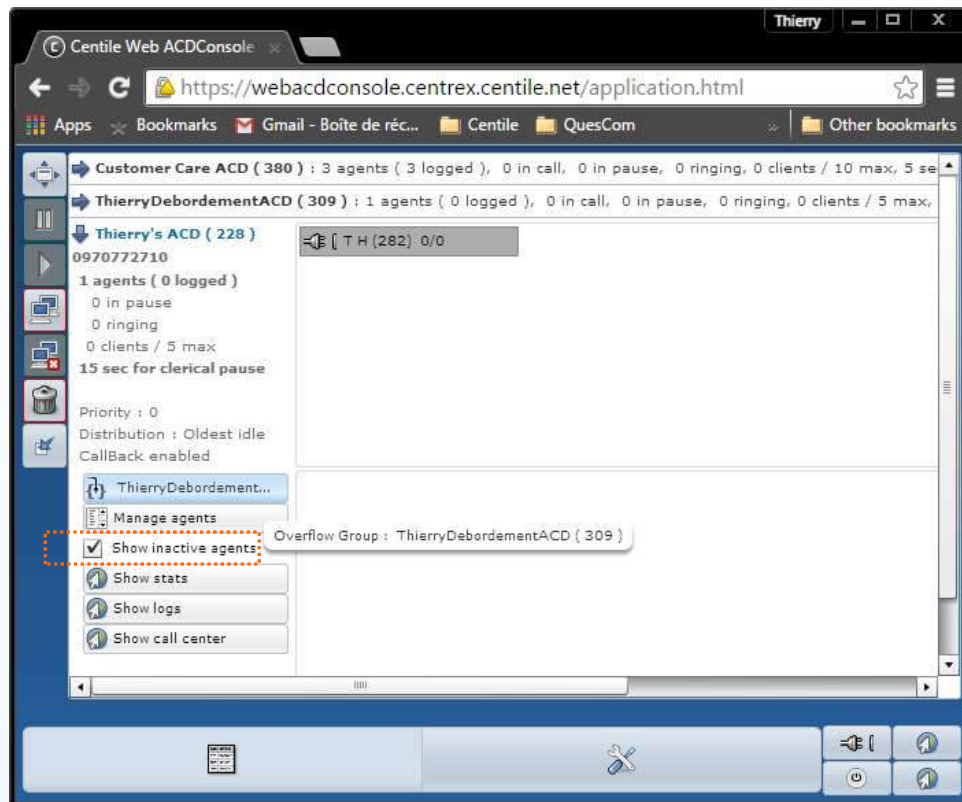


Figure 64 Define overflow Group 3/3



8.1 Clients management

The Supervisor is enabled to perform the following actions:

- move a waiting client from a group to another group of agents
- transfer a waiting client to a contact from the contact list
- remove a client

Moving a waiting client from an ACD group to another

When a client calling an ACD group has been put in a queue for a certain amount of time as all agents from this group were on line, the Supervisor can decide to allocate the client to another group where agents are available to take his call. This action is done on a drag and drop basis.

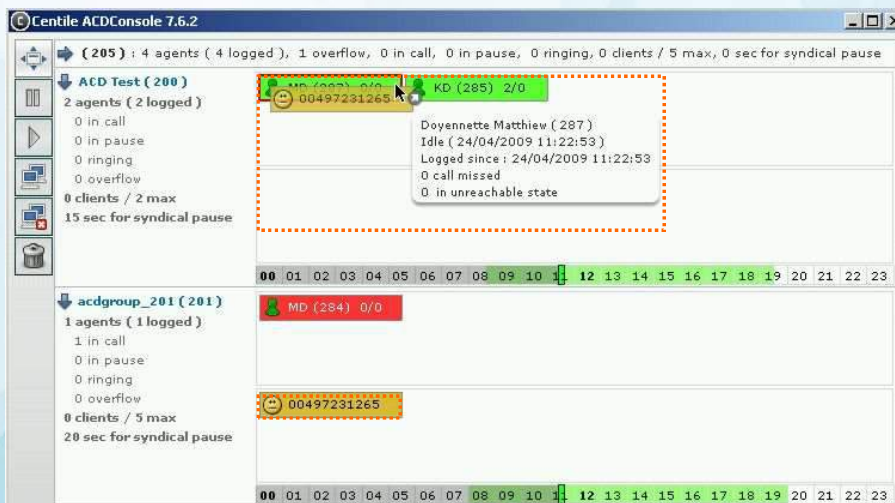
In the example below, the agent MD284 in Group 201 is online. The Supervisor is forwarding the waiting client to an available agent in group 205 e.g. MD287

Figure 58 Forward a waiting client from a group to another (1/3)



Select the client you want to move to another group

Figure 59 Forward a waiting client from a group to another (2/3)



Drag the client's "box" to the agent who will answer the call

Drop the client's "box" to the agent's "box". This will open the confirmation window.

Figure 60 Forward a waiting client from a group to another (3/3)



Select yes to transfer the client to agent MD287 in group 200 or wait until the timer (set to 5 seconds) is due.

The agent MD287 is now in a call with the client.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The transfer of a client has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to transfer will automatically be performed after 5 seconds.

When moving a waiting customer to an agent, the agent's status will be seen as a private call.

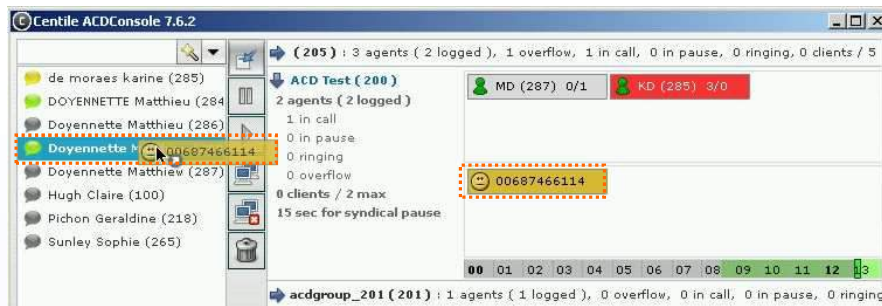
When moving a waiting customer to an ACD group, the status of the agent taking the call will be seen as ACD call.


The customer is not aware of his transfer to another ACD group.

Transferring a waiting client to a contact from contact list

The Supervisor recognized the telephone number of a client. This one usually calls an ACD group, but the Supervisor definitely knows that this client is calling for Matthieu Doyennette. Instead of waiting for an agent to answer the call, the Supervisor, set in overflow mode and therefore able to answer calls on agent's behalf, takes the initiative to answer to this client and forward him to the requested contact. This action is based on a drag and drop basis.

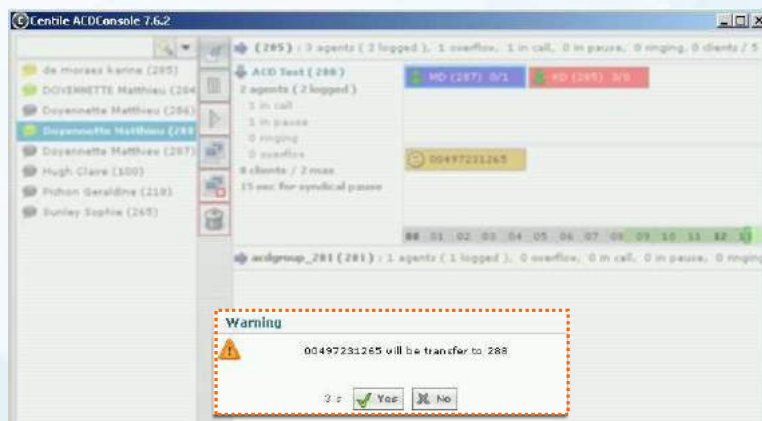
Figure 61 Forward client to contact list (1/3)



Click on the expand icon  to open the contact list.

Drag and drop the client to the requested contact.

Figure 62 Forward client to contact list (2/3)

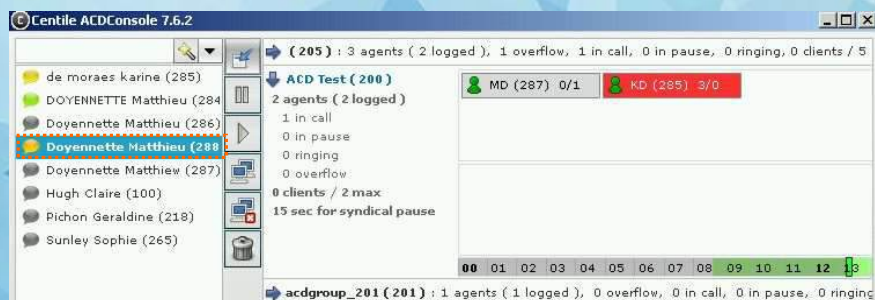


Select yes to transfer the client to ext# 288 or wait until the timer (set to 5 seconds) is due.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The transfer of a client has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to transfer will automatically be performed after 5 seconds.

Figure 63 Forward client to contact list (3/3)



Removing a waiting client

The ACD Console enables the Supervisor to remove a client from an ACD group to the dustbin.

There are 2 possible ways:

- right clicking on the client
- drag and drop to the dustbin

Figure 64 Remove a waiting client from a group – right click (1/2)

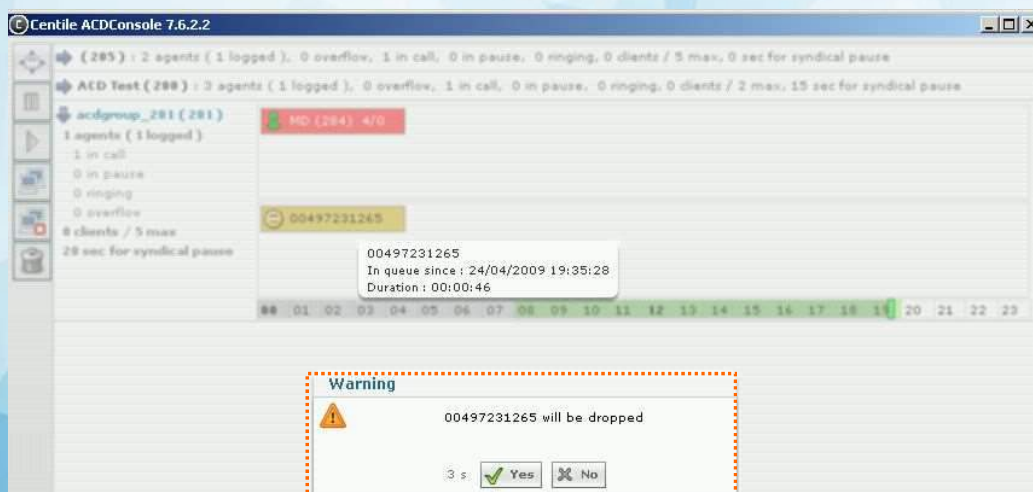


Select the client to be removed.

Right click the mouse.

Select “Drop client”. This will open the confirm box.

Figure 65 Remove a waiting client from a group – right click (2/2)



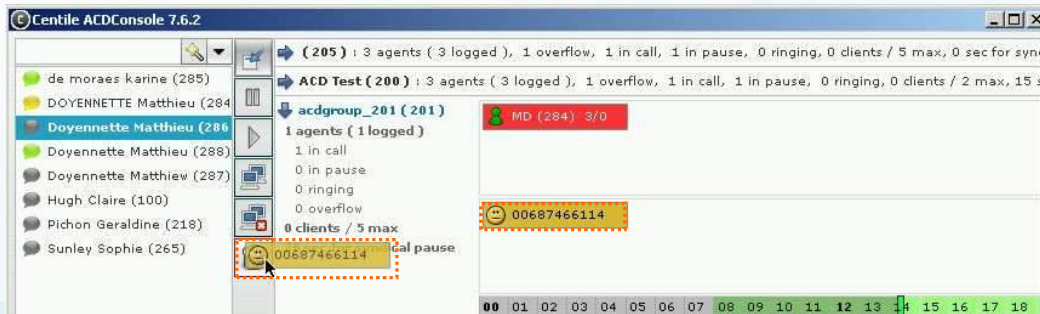
Select yes to remove the agent or wait until the timer (set to 5 seconds) is due.

Please note:

As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The deletion of a client has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to delete will be performed after 5 seconds.

The client has been removed from the ACD group 201 and the call was ended automatically.

Figure 66 Remove a waiting client from a group – drag and drop (1/2)



Select the client to be removed.


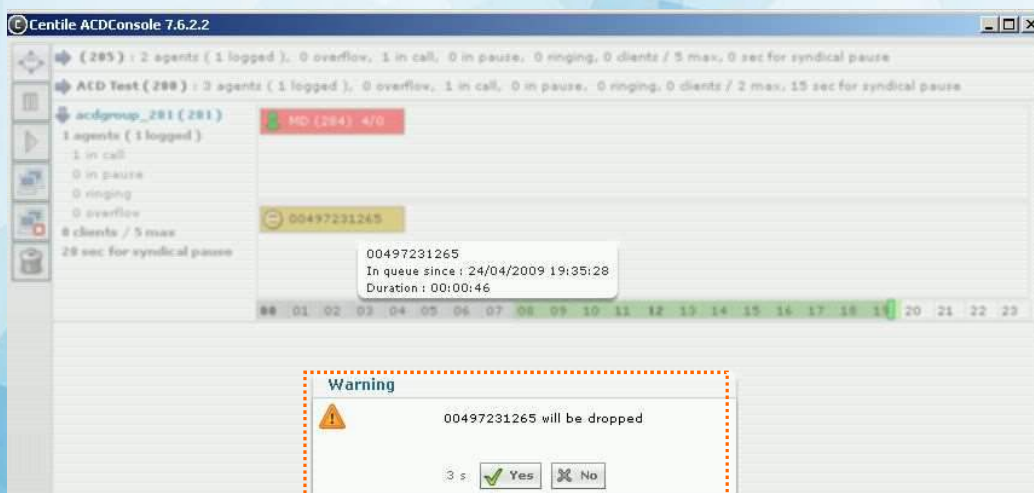
Drag and drop the client to the dustbin box . This will open the confirm box.

Figure 67 Remove a waiting client from a group – drag and drop (2/2)



Select yes to remove the client or wait until the timer (set to 5 seconds) is due.

Note: As stated previously in the guide, the Supervisor is enabled to define the length of time the confirmation box will stay on the screen before a specific action is made. The deletion of a client has been set to 5 seconds, meaning that if the Supervisor doesn't press "Yes", the action to delete will be performed after 5 seconds.

The client has been removed from the ACD group 201 and the call was ended automatically.

ACD Console Features

Application settings Management (at installation level)

- Automatic launch at startup
- Iconify in systray at start up
- Iconify in systray instead of quitting
- Set language
-

Agent Status Management

- Idle (logged)
- Idle in overflow
- Unlogged
- In overflow unlogged
- Unreachable
- In private call
- In private call mode overflow
- in ACD call
- in ACD call mode overflow
- in pause
- in syndical pause
- alerting
- Agent status' color fully customizable
-

Client status Management

- Normal waiting time
- Maximum waiting time
- Client status' color fully customizable
-

Confirm box Management

- Define the length of time the confirmation box window stays on the screen and this related to:
- Moving agent
- Deleting agent
- Moving client
- Deleting client
- Transferring client
- Refresh rate time management
-

Agent ACD Call Management

- add an agent from the contact list into a group of agents
- add an agent from the contact list into a group of agents as overflow mode
- login/logout an agent
- put an agent in pause/un-pause an agent
- remove an agent from an ACD group
- move an agent from an ACD group to another
- copy an agent already in an ACD group to another group
-

Client ACD Call Management

- move a waiting client from a group to another
- transfer a waiting client to a contact from the contact list
- remove a client
-

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