



**ACD Agent/Supervisor  
Telephone User Guide**

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# Introduction

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This guide provides instructions for an Agent or Supervisor using a Strata 3000-series telephone with Toshiba's Strata Automatic Call Distribution (ACD) application. It provides step-by-step instructions on how to use the ACD features and buttons on the Agent and Supervisor stations.

For instructions on using the non-ACD specific features of your telephone, refer to the appropriate Quick Reference Guide or User Guide. See [“Related Documents/Media” on page v](#).

This user guide is divided as follows:

- **Chapter 1 – The Grand Tour** describes available ACD Agent and Supervisor features and ACD buttons.
- **Chapter 2 – Status Features** provides a description and step-by-step operational procedure for features associated with changing or monitoring the status of users.
- **Chapter 3 – Call Features** provides a description and step-by-step operational procedure for handling calls using the ACD features.

# Conventions

Conventions	Description
<b>Note</b>	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
<b>Important!</b>	<i>Calls attention to important instructions or information.</i>
Extension Number	<p>Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used.</p> <p><b>Note</b> The naming convention for DKT assignments within Toshiba is Directory Numbers. For clarity and ease of understanding, the terms Extension Number and Phantom Extension Number will be used in this document in lieu of PDN and PhDN.</p>
<b>Arial Bold</b>	Represents telephone buttons.
+	<p>shows a multiple PC keyboard or telephone button entry. Entries without spaces between them show a simultaneous entry.</p> <p>Example: <b>Delete+Enter</b>.</p> <p>Entries with spaces between them show a sequential entry.</p> <p>Example: <b># + 5</b>.</p>
Tilde (~)	Means "through." Example: 350~640 Hz frequency range.
<a href="#">See Figure 10</a>	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.
➤	Denotes the step in a one-step procedure.
➤	Denotes a procedure.



## Related Documents/Media

Some documents listed here may appear in different versions on the CD-ROM or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

Refer to the following for more information:

- Strata CIX Call Center Solutions General Description
- Strata CIX ACD Supervisor User Guide
- Strata CIX ACD Installation Guide
- Strata CIX IPT/DKT Telephone User Guide

### CD-ROMs

- Strata CIX Call Center Solutions Application Software and Documentation Library for Strata ACD, Insight, OAISYS Net Server, and OAISYS Voice Assistant
- OAISYS includes software and documentation for OAISYS Chat, Call Router, and Net Phone

For *authorized users*, Internet site FYI (<http://fyi.tsd.toshiba.com>) contains all current Strata CIX documentation and enables you to view, print and download current publications.

## **Introduction**

*Related Documents/Media*

Automatic Call Distribution (ACD) for Toshiba Strata systems provides a quick, efficient means of handling a large volume of incoming calls that are automatically connected to ACD Agent Groups.

Calls are served in order of arrival based upon assigned priorities and are automatically distributed among available Agents. The ACD features also provide announcements to incoming callers when no Agent positions are available to immediately handle the call.

## ACD Agent

An ACD Agent can use a Toshiba Strata 3000- or 2000-series digital telephone. Toshiba recommends using a Strata 3000-series Liquid Crystal Display (LCD) telephone for all Agents requiring display functions. The Strata 3000-series LCD digital telephone has improved data handling capabilities for instantaneous display updates. If the Strata 2000-series LCD digital telephone is used, the display will go blank for one to several seconds during ACD information updates.

LCD telephones can be very helpful for displaying queue status and assisting in several features involving data entry from the telephone, such as logging into multiple groups. Toshiba telephones have feature buttons that access the ACD features.

# ACD Group Supervisor

ACD Group Supervisors must use a Toshiba Strata 3000-series digital telephone with an LCD. The LCD provides important information about the ACD Group or an individual Agent's activities.

The ACD Group Supervisor's log in enables access to features that are exclusive to Supervisors.

- **Start/End Shift** is used to start an ACD shift. It toggles to End Shift when pressed again. End Shift prevents calls from entering the ACD queue.
- Another ACD button is **Monitor Call**, which enables Supervisors to monitor Agent's conversations on ACD calls. Supervisors can also participate in the call by pressing **Join**.
- Both Agents and Supervisors can display the queue status, but Supervisors can display the call status of individual Agents.
- Agents can call the ACD Group Supervisor for help with an ACD call. The Supervisor can talk to the agent with the ACD call on hold, or talk exclusively to the caller while the Agent drops out, or participate in a three-way conversation with the Agent and the ACD caller.
- Supervisors can opt to log in as an Agent in order to alleviate heavy call loads.

## ACD Telephone

The Strata 3000-series digital telephone with an LCD and typical ACD feature buttons is shown on the next page. The button names are recommended by Toshiba. If your button names are different, see the System Administrator or your ACD Supervisor for the definitions.

LCD shows Queue Sales group status.  
5 of 6 Agents are logged in.  
Calls Waiting = 2 in queue.  
Longest call waiting in queue is 4 minutes.

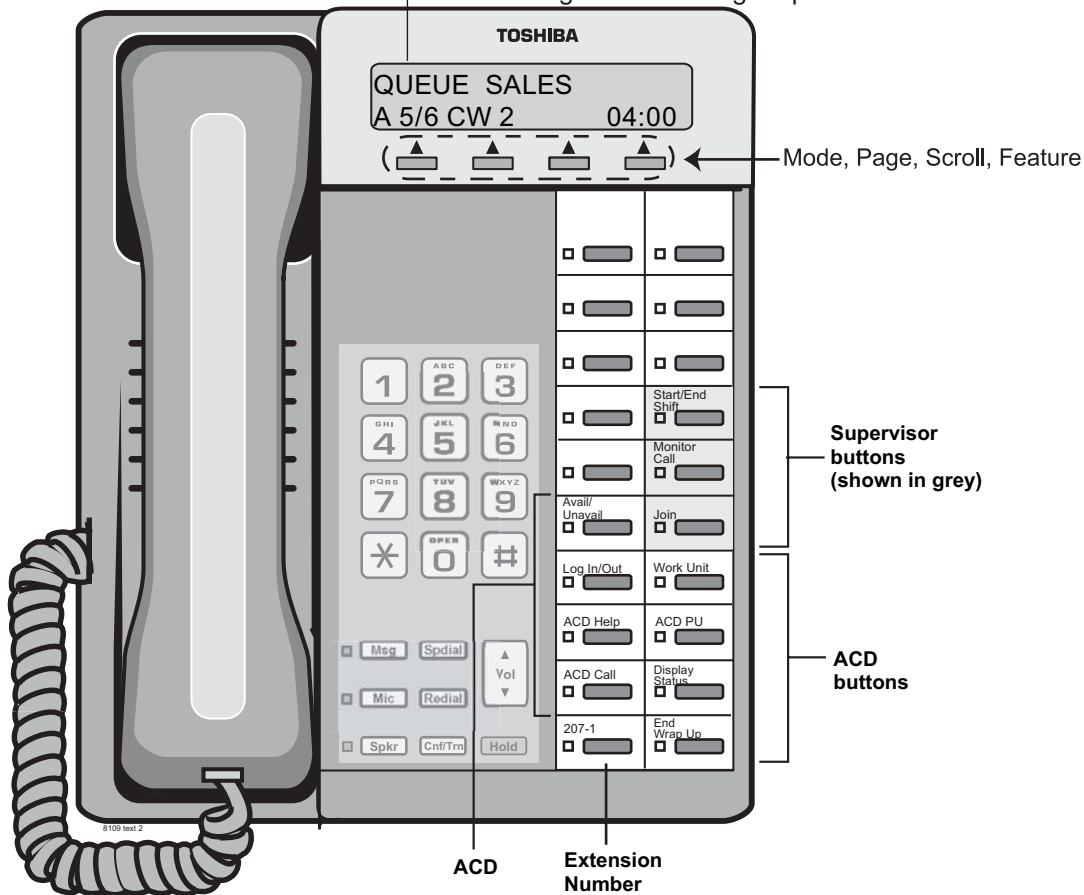


Figure 1 DKT3200-series LCD Telephone with ACD Buttons

## Flexible Buttons

All flexible buttons must be programmed for your telephone in system programming and vary for individual telephones. If a button does not appear on telephone keypad, see your System Administrator. [Table 1](#) explains the function of each ACD button.

**Table 1 Flexible Button Definitions**

Button	Definition
<b>ACD Call</b>	The extension that is used to log into an ACD Group becomes the telephone's <b>ACD Call</b> button. This button enables an Agent or Supervisor to receive ACD calls, make/receive PBX calls, and Log In/Out of the ACD Group. This button can be used to make/receive non-ACD calls when logged out.
<b>ACD Help</b>	Places an ACD call on hold and automatically rings the Supervisor.
<b>ACD PU</b> (Pick up)	Enables an Agent to Pick Up ACD calls ringing at any Agent's telephone in the same group. The call remains registered as an ACD call after being picked up.
<b>Avail/Unavail</b>	Avail: Enables the telephone to accept ACD calls. Unavail: Stops ACD calls from temporarily ringing the telephone. Calls will stack up in queue if all Agents are Unavailable. Calls will go to Re-route Destination only if all Agents Log Out.
<b>End Wrap Up</b>	Sets Wrap Up time to end in one second. After one second, the telephone becomes available to take ACD calls.
<b>Start/End Shift</b>	<b>(Supervisor only)</b> Used to start or end an ACD shift. Pressing this button shows options on the LCD: 1 Disable, 2 Enable, 3 Scheduled. "End shift" stops calls from entering the ACD queue and directs all new incoming ACD calls to a pre-assigned destination.
<b>Log In/Out</b>	Agents or Supervisors use this to log in and out of the ACD Group. It is used with the <b>ACD Call</b> button.
<b>Monitor Call</b>	<b>(Supervisor only)</b> Monitors (listens to) an ACD call.
<b>Join</b>	<b>(Supervisor only)</b> This enables the Supervisor to participate in the Agent's call, making it a three-way conference.
<b>Work Unit</b>	Assigns a tracking code to an ACD call.

**Table 1** Flexible Button Definitions (continued)

Button	Definition
<b>Display Status</b>	Turns Display Status on or off. This shows how many Agents are in the group and logged in, and the number call waiting in the queue and longest time a call has been waiting in queue. Additionally, Supervisors can view the call status of individual Agents or other ACD groups.

## Extension Number Buttons

The extension number buttons consist of: extension numbers, secondary extension numbers, and phantom extension numbers. They make or answer calls and are known as your extension or intercom number. You can have multiple extension number buttons on your telephone (Figure 1 on page 3); however, an agent should not use any extension number that is shared by another phone, including an agent's Primary Extension Number.

In addition, an agent's phone should not have a Group CO line or Pool Line key and any extension number should not be a member of either a Multiple Calling or Hunt Group.

**Table 2** Extension Button Definitions

Button	Definition
Primary Extension Number	This is your specific extension or intercom number used to make or receive calls. Your telephone can have multiple primary extension number buttons with your number. You can set Call Forward and Voice Mail ID code for your Primary extension number
Secondary Extension Number	This is the Primary extension number of another telephone which appears on your telephone. Agents should use this on their phone.
Phantom Extension Number	<p>Up to eight Phantom extension numbers can be dedicated to a station. ACD calls must have a Phantom extension with a single appearance, owned by the Agent's telephone.</p> <p>You can only set Call Forward and Voice Mail ID code for Phantom extension numbers that are owned by your telephone.</p> <p>You can have a separate <b>Msg</b> button and mailbox for up to four phantom extension numbers on your telephone.</p>

# Agent Telephone Status

You can make and receive different types of calls depending upon the status of your ACD Agent telephone.

- **Log In** - You are logged into an ACD Group once an entry code has been entered and accepted by the ACD system.
- **Log Out** - You are logged out of the ACD Group. You can still receive and make non-ACD calls.
- **Available** - If you are logged in as an ACD Agent, you can receive ACD or PBX calls and non-ACD calls to other [DNs].
- **Unavailable** - You are unavailable to take ACD calls when you activate this feature. Your telephone can still receive and make non-ACD or PBX calls when it is in the unavailable mode. You will not receive ACD calls in unavailable mode.
- **Wrap Up** - After you disconnect from an ACD call, your telephone will not ring for a pre-determined amount of time so that you can perform work related to the last call. You can receive non-ACD or PBX calls if your telephone has been programmed to receive these calls during the Wrap Up period.
- **Non-ACD Call** - When you are on an ACD or PBX call, or have one on hold, you can receive non-ACD calls on other [DNs] or CO lines.

**Note** While an agent is logged into ACD, the agent should not use Program, Administrator, or Command modes. If the agent uses one of these modes, the Login lamp turns off when exiting the mode. When that happens, the agent needs to log out and login again. If a call is delivered while the agent is in these modes, the agent automatically logs out. If the system goes down while the agent is logged in using IPT, ACD lamps may remain off after the system restarts. When this happens, the agent needs to log out and log in again.

## Tones

- **Entry Tone** – A series of short beeps. Notifies you that the entry was successful.
- **Reject Tone** – A high-pitched tone followed by a low-pitched tone. (The tone sound is up/down, up/down). Notifies you that the entry was invalid.
- **Alarm Tone** – A loud high-pitched tone followed by a low-pitched tone that plays from the telephone speaker base.



This chapter lists all the ACD features applicable to an Agent's or Supervisor's station for changing status.

- Logging In/Out
- Unavailable/Available
- End Wrap Up Time
- Status Display
- Shift Mode (Supervisor)
- Queue Alarms

**Note** If your telephone does not have an LCD, you will hear tones to notify you when an entry has been accepted or rejected. The following procedures indicate when tones are played. LCD telephones will not play tones.

## Logging In/Out

You become enabled for handling calls associated with ACD Group(s) by logging in. By entering a valid Agent ID, password, and ACD group number, your telephone becomes available for receiving ACD calls, and the ACD feature codes are activated.

The extension that is used to log into an ACD Group becomes the telephone's **ACD Call** button.

## Status Features

### Logging In/Out

When you log out, the ACD features are deactivated on your telephone, but the regular features still continue to work. For example, you can use the **ACD Call** button to make and receive non-ACD calls. These kinds of calls are not registered as PBX calls for Management Information System (MIS) reporting purposes.

The Log In/Out LED turns off and your telephone is logged out of the ACD Group. After all Agents have Logged Out, new ACD calls are redirected to the re-route destination. Calls currently in queue will go to the overflow destination.

For example, if it is time for your ACD shift to end, but calls are continuing to arrive into the ACD queue, the Supervisor can invoke the End Shift procedure to re-route new calls.

#### ► To Log In

1. Press **ACD Call + Log In/Out**. The Log In/Out LED flashes red and Entry Tone (four fast beeps) plays.
2. Enter your Agent or Supervisor ID code + **#**.

Enter Agent ID:  
XXXXXXXX

**Important!** *The Supervisor log in ID code should be kept confidential to prevent unauthorized use of Supervisor features.*

3. Enter your password + **#**.  
...or press **#** if no password is assigned.

Enter Password:  
XXXXXXXX

Non-LCD: Entry tone plays for successful login;  
Reject tone plays if unsuccessful.

4. Enter the ACD group number + **#**. To enter additional groups, wait a few seconds (prompt shown on the right reappears), enter another group number + **#**. Repeat until you have completed group entries.

Enter Group ID:  
<group name>

Non-LCD: Entry tone plays after each group number is successfully entered.

Logged in To:  
<group name>

...or press **\*** to enter all assigned groups.

Logged in To:  
All Groups

**Important!** *Do not enter the same group number twice during log in. The first entry logs in, if you enter it a second time, you will log out and the display shown right appears.*

Logged Out Of  
<group name>

5. **(Supervisor Only)** If you want to take calls as an Agent while logged in, press **1** if you don't want to take calls as an Agent

...or press **2** if you want to take calls as an Agent.

Non-LCD: Entry tone plays if successful;  
Reject tone plays if unsuccessful.

1 Do Not Answer  
2 Answer Calls

The LCD shows the logged in group(s), shown right. This display remains for five seconds or until you hang up. The Log In/Out LED turns steady red.

Logged In To:  
<group name>

Repeat this process for each group that you are logged into.

If you pressed **\*** in the previous step, when pressing **1** or **2** in this step applies to all groups that you are logging into.

Non-LCD: If log in is not successful, Reject Tone plays.

If unsuccessful, an error message displays (shown right) for five seconds or until you hang up. Error message may say "Invalid Passcode" instead.

Invalid ID

➤ **To Log Out of all groups**

1. While idle, press **Log In/Out**. The LCD prompts you (shown right).
2. Press the **OK** Soft Key to log out of all groups or press the **Cancel** Soft Key to cancel the log out. If you pressed the **OK** Soft Key to Log Out, the LED turns off, indicating you logged out of all groups.

Log Out ALL?  
OK Cancel

## Status Features

### *Unavailable and Available*

#### ► To Log Out of one or more groups

1. Press **ACD Call + Log In/Out**. Dial Tone is heard until the Log In is pressed.
2. Enter your Agent ID code + **#**.
3. Enter your passcode + **#**.
4. Enter the queue number to log out of + **#**.

Non-LCD: Entry Tone plays if successful; Reject Tone plays if the ID is incorrect.

If you have successfully logged out of a group, the text (shown right) displays for five seconds or until you hang up.

Logged Out Of: <group name>
--------------------------------

If you want to log out of additional groups, continue to Step 5.

5. After a few seconds, “Enter Group ID” displays. Then enter the next group number to log out. If you don’t enter anything after five seconds, it will exit from log out processing.

## Unavailable and Available

This feature enables temporary unavailability for ACD calls without logging out. You can use this feature for breaks, such as lunch and coffee breaks, and extended times away from your telephone.

#### ► Press **Unavail**.

The Unavail LED lights steady red. The Unavail LED turns off when your telephone becomes Available. To enter the Unavailable mode, you must be logged into at least one ACD Group.

**Note** Calls will stack up in queue if all Agents are Unavailable. An alarm is likely to be triggered when too many calls are in queue. Calls will go to re-route destination only if all Agents Log Out.

#### ► To become Available

- Press **Unavail**. The Unavail LED turns off.

## End Wrap Up Time

When you have completed an ACD call, your telephone may enter the Wrap Up mode automatically if that option is selected for your ACD group. Wrap Up mode is a pre-defined mode with a time limit that enables you to process paperwork or complete items related to your last ACD call without interruption. ACD calls are routed to you again when the Wrap Up time limit expires or you end it.

When you have completed your paperwork, you can end the Wrap Up time period by pressing **End Wrap Up** work. You can make/receive PBX calls during the Wrap Up time period.

### ► To end Wrap Up Time

When a call has completed, your phone automatically enters the Wrap Up state. The LCD shows this and the remaining time until your phone will become available for the next call.



ACD Wrap Up  
mm:ss

- Press **End Wrap Up**. Wrap Up time will end in one second and your LCD returns to idle. You are now available to accept incoming ACD calls.

# Status Display

ACD Agents and Supervisors can press a button to display the queue status. The Supervisor's phone is also able to view the Agent Status (Available, Unavailable, etc.) for each Agent logged into your ACD Group.

A button is available for the phone to allow for stopping or re-starting the Status Display. When a call is active, this display is removed to enable the Strata to present information about that call. When the call is ended, Queue Status is restored.

## ► To Display Status for a Group or a Queue

1. Press **Display Status**. The ACD group name appears on the top line. Example shown right (bottom line), one out of four Agents has logged in, there are two calls waiting, and the longest time a call has been waiting is four minutes.

QUEUE < Group Name>		
A 1/4	CW 2	04:00

2. Press **Page** to return to Queue Status.

## ► To Display Status for an Agent

1. (Supervisor only) Press **Display Status**.
2. Press **Page** to view the Agent Status for that group. Press **Scroll** to view the next Agent. Agent status is shown on the bottom line. Status modes are:

QUEUE < Group Name>	
IDLE:	<Agent's Name>

IDLE

LOG OUT

UNAVAIL

NON ACD (call)

ACD (call)

WRAP-UP

3. Press **Page** to return to Queue Status.

➤ **To turn Auto Scroll On or Off**

- Press **Feature** to toggle Auto Scroll On and Off. When it is Off, you can manually scroll through the groups.

Auto Scroll On

➤ **To Use Auto Scroll Off Options**

When Auto Scroll is Off, you can manually scroll through the groups.

- Press **Scroll** to view the next group. Each time you press **Scroll**, the next group displays.
- Press **Mode** to change the direction of the scrolling (forward/backward).

Auto Scroll Off

➤ **To set the Auto Scroll Interval**

1. Press **Feature** to toggle Auto Scroll On.
2. When you turn Auto Scroll On, press **Scroll** to view the scroll interval.
3. Press **Scroll** to increment the seconds for scrolling higher or press **Mode** to increment the scroll time lower.

Auto Scroll On

Scroll Interval: 08  
A 1/4 CW2

➤ **To Use Auto Scroll On Options**

**Feature** toggles Auto Scroll On and Off. When it is Off, you can manually scroll through the groups.

- Press **Scroll** to view the next group.
- Press **Mode** to change the direction of the scrolling (forward/backward).

# Shift Mode

## Supervisor Only Feature

An ACD Group Supervisor can press **Start/End Shift** to manually start or end a shift, or to enable a pre-defined shift schedule. Only someone who has logged in as a Supervisor can activate or cancel this feature.

The ACD application will start up in the same mode that it was in at the last shut down. For example, if the shift was “Disabled” at the time of shut down, it will be “Disabled” when the ACD application starts again, unless a Supervisor “Enables” the shift.

### ► To change ACD shift mode

1. While idle, press **ACD Call + Start/End Shift + yyy**. (yyy = ACD Group number)
2. Choose the mode to operate by dialing the appropriate code:

- 1** - Enabled
- 2** - Disabled
- 3** - Scheduled (follows pre-defined schedule)

<b>Status: Enabled</b> <b>2 Disabled 3 Schedule</b>
--

The current status displays on the top row of the LCD. The available options display on the bottom row. When the status changes, this is shown on the LCD and the available options also change.

If Disabled is chosen then the Start/End Shift LED blinks, then turns off. If calls are in queue when the shift is disabled, they will be routed to the re-route destination assigned in the Strata ACD Administration program. The LED turns off when all calls are cleared.

3. When prompted, you can enter another queue number and repeat Step 2 or hang up.



# Queue Alarms

During queue operation, a number of conditions can send an alarm indication to Agent's and Supervisor's telephones. These warnings are to alert the Supervisor or Agent that some action may be necessary to correct for the condition.

## ► To view Alarms

Alarms for the Queues will automatically appear and provide an audible ringing sound on the phone. Emergency Call type ringing occurs when the phone is idle.

- When the Emergency Call ringing sounds (repeating high/low ringing), press the **CLR** (Clear) Soft Key to turn the alarm off. The Alarm stops and the LED turns off. Repeat for additional alarms.

<b>Calls Waiting</b> <b>CLR</b>
------------------------------------

**Status Features**

*Queue Alarms*

This chapter describes ACD call features for Agents and Supervisors, including:

- Answering Calls
- Hold
- ACD Call Pickup
- ACD Help
- Work Unit
- Agent Assistance Call (Supervisor)
- Call Monitor/Join Call (Supervisor)

## Feature Interaction

Strata provides the ACD features from system-resident software. The following features are affected when your station is logged in as Agent:

- **Call Forwarding** – All types of Call Forwarding from extension numbers and phantom extension numbers are allowed. ACD calls do not forward, but PBX and non-ACD calls do forward in the normal manner.
- **Station Do Not Disturb (DND)** – The Station DND feature does not operate when your station receives an ACD call. DND only applies to non-ACD or PBX calls directed to your extension.

# Answering Calls

➤ **To answer an ACD call**

1. Call rings on Agent's **ACD Call** button and the LCD displays text (shown right).
2. After a specified number of seconds, Caller ID appears (example shown right).

Call To:  
<Group name>

CALLING NUMBER: XXXXXXXXXXXX

**Note** See your System Administrator for the number of seconds configured for your system. Default = 10 seconds.

3. Press **ACD Call** to answer the call.  
...or go off hook. The ACD Call LED flashes at the in-use rate (three quick flashes, solid green – repeat).
4. Hang up when you have completed the call. Your telephone enters Wrap Up Mode, providing you with time to perform paperwork associated with the call.

ACD Wrap Up  
00:00

# Hold

➤ **To place calls on Hold**

- Press **Hold**. The ACD Call LED flashes at a fast rate and your LCD shows the message on the right.

Hold <Line 5>  
Jul 27 Tue 02:26

➤ **To retrieve calls from Hold**

- Press **ACD Call**. The ACD Call LED flashes at a fast rate and your LCD shows the message on the right.

CALLING NUMBER: XXXXXXXXXXXX

# ACD Call Pickup

You can pick up an ACD call ringing at another Agent's telephone by using your station's ACD Call Pickup button. To use this feature:

- Both stations must be in the same ACD Group.
- The incoming call must be an ACD call for that group.
- Your ACD Call button must be idle.
- You must be in an available state.

You cannot pick up some types of calls, such as non-ACD calls (internal office calls) or PBX calls.

## ► To Pick up an ACD call ringing at another station

1. Press **ACD PU**. When the call is diverted to you, your LCD shows the text for the connected call (shown right).
2. The call rings your telephone, press **ACD Call** to answer.

Call to: <Group name>

## ACD Help

You can call your ACD Group Supervisor for assistance during an ACD call by pressing the **ACD Help** button. This button enables you to:

- Talk to your Supervisor or Agent while the ACD call is on hold.
- Establish a three-way conversation with your Supervisor or Agent and the ACD caller.
- Drop out of the three-way ACD call while your Supervisor and the ACD caller remain connected.

### ► To call your Supervisor for Help

#### 1. Press **ACD Help**.

The call is automatically placed on consultation-hold and called telephone rings. When your Supervisor answers the Help call, you can talk to the Supervisor and the ACD Call remains on consultation-hold.

Non-LCD: Reject tone plays if no Supervisor is available to help.

**Note** If your Supervisor is not logged in, this feature is not available. If your Supervisor's telephone is busy in monitor mode, ACD Help not ring your Supervisor's telephone. See LCD (shown right).

Supervisor Not Ready
-------------------------

#### 2. Optional steps:

- Add the caller to the call (conference) by pressing **Cnf/Trn** or you can put the caller on Hold.
- Transfer the call to your Supervisor, hang up.
- Return back to the original caller and release your Supervisor by pressing **ACD Call**.

# Agent Assistance (Help) Call

## Supervisor Only Feature

An Agent in your ACD Group can call you for assistance by pressing the **ACD Help** button on their station.

**ACD Help** rings the Supervisor telephone if the Supervisor's **ACD Call** button is available. The ACD Help feature enables you to:

- Talk to an Agent with the ACD call on hold
- Talk to an ACD caller with the Agent dropping out of the call by hanging up
- Participate in a three-way conversation with the Agent and the ACD caller

For this feature to work, your telephone must be logged in with the Supervisor ID code of the same Group as the Agent requesting help.

### ► To answer an Agent's call for Help

1. When you hear a long, single ring and you see the Help Request **HR:** on your LCD (shown right), press the **ACCEPT** Soft Key to accept the call for help or press **DENY** to reject it.

<b>HR: &lt;agent name&gt;</b> <b>ACCEPT DENY</b>
---

2. When a call rings your **ACD Call** button, press it. The ACD Call LED flashes at the I-Use rate.

## Work Units

The Work Unit feature enables tracking of ACD calls by assigning Work Unit codes. The tracking is useful, because of the information that can be collected, for example; response to sales campaigns, calls from a particular area, etc. The codes are recorded by MIS for reporting purposes.

Multiple numbers can be entered for a call. The account code counts will reflect the total of all entries, but some reports will only show the most recent code entered.

Work Units can be registered on any call appearing on the **ACD Call** button. Work Units may be entered anytime during the call.

### ► To Enter a Work Unit Code

1. While talking on a call on ACD Call, press **Work Unit**. The Work Unit LED flashes. The conversation is not interrupted.
2. Enter the Work Unit digits.
3. Press **#**. The display on the right shows for three seconds after entering a valid code. Work Unit LED turns off.

Enter Work Units  
XXXXXXXX

Work Units Set:  
To: <Work Units>



# Call Monitoring/Join Call

## Supervisor Only Feature

Call Monitoring or Join Call enables the Supervisor, to monitor conversations between an ACD Agent and caller. A one-way, listen-only path is established for the Supervisor only. The monitoring feature does not apply to non-ACD calls. The Supervisor may participate in the conversation using the Join Call function. This provides a three-way conference with the Agent and the caller.

**Important!** *This feature is only intended for ACD Supervisors, so the Supervisor log in ID code should be kept confidential to prevent unauthorized use of this and other Supervisor features.*

### ➤ To Monitor a call

- Press **ACD Call + Monitor Call + yyyy + #**. Where **yyyy** is the Agent ID.

Enter Agent ID:

Whenever the monitored Agent is on an ACD Call, the LED is set to the red I-Use rate and your LCD shows “Monitoring.” The call may be heard over the speaker.

Monitoring Agent:  
<Agent Name>

### Notes

- If the Agent is not on an ACD call, the one-way, listen-only path still exists.
- This feature is limited by the availability of conference channels. If there are no conference channels available, a reorder tone is heard.

You will continue monitoring the Agent's ACD calls until monitoring is cancelled or the Agent logs out.

### ➤ To cancel Monitoring

- Press **Monitor Call**.

## Call Features

### Call Monitoring/Join Call

#### ► To Join a call

1. Press **ACD Call + Join**.

If you are monitoring a call when you press the **Join**, both the Join and Monitor LEDs flash slow green.

<b>EXT + Line 1</b> <b>EXIT</b>
------------------------------------

2. Press **Join** again and your telephone will return to monitoring (listen only).

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