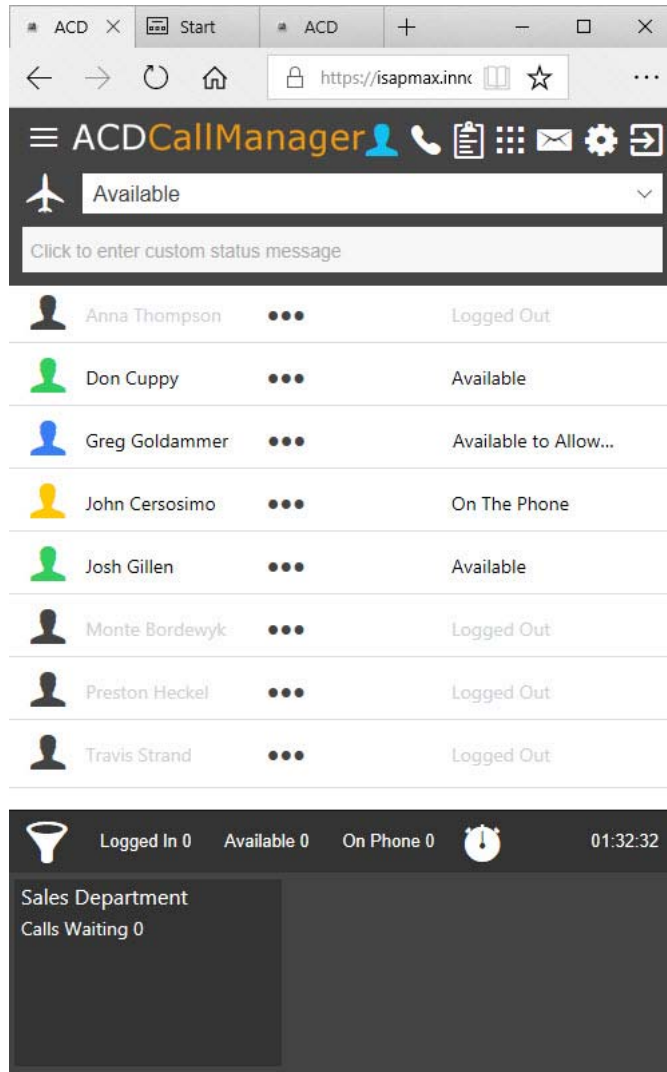# ACD – Call Manager User Guide

Please Read this Important Note!

For the ACD software to function at maximum efficiency it is important that ALL calls are placed and received through the ACD Call Manager. Supervisor/Management reports generated by the system will not be accurate unless calls are taken and made with the software.
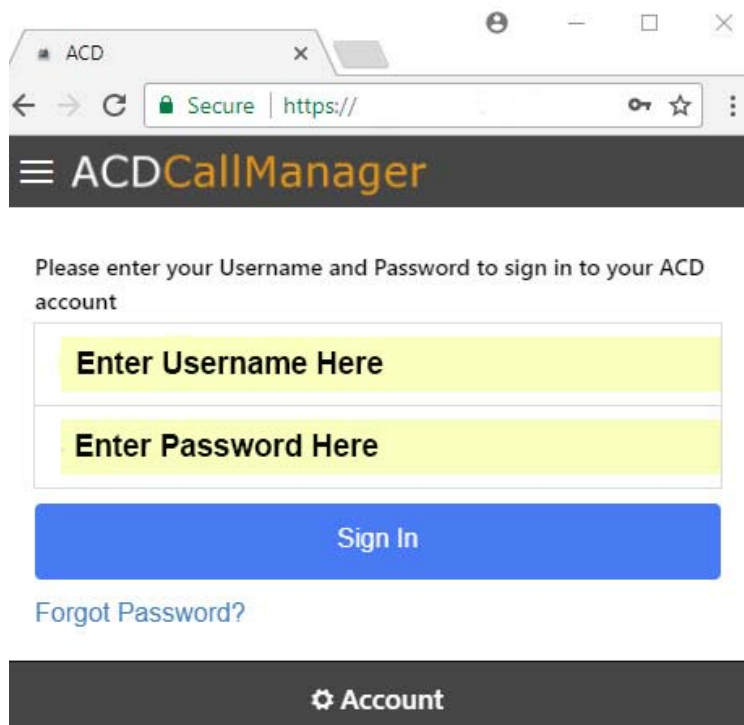
The following user guide will show you how to, manage and place calls with your ACD Call Manager.

There is also a Basic Call Manager User Video, please contact us if you would like access to this video.
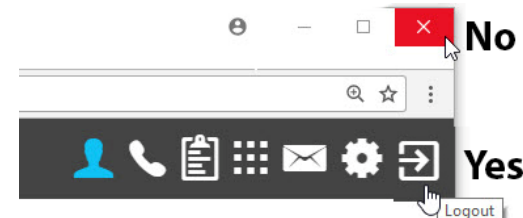
Activating The ACD Call Manager

1. You Must Log-in through a Website Address

- Using this web address: (please insert your ACD Call Manager web address here) copy and paste it into a supported browser – Google Chrome, Microsoft Edge, Mozilla

- You will then need to log in with your unique User ID and Password provided by our office.

Very Important: It is imperative that you click on the Log Out icon instead of closing the browser when you leave the Call Center.


The service will not retain new contact information or change your status to Logged Out if you don't use the Log Out button.

If you know your Username, you can click on Forgot Password and reset information will be emailed to the email address associated with your ACD Agent account.
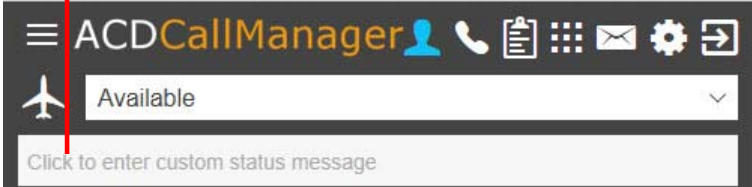
Status Definitions

- When an agent logs in they will be available to take calls

- Your Status can be managed by clicking on the Status drop down bar

- See Status definitions on the next page
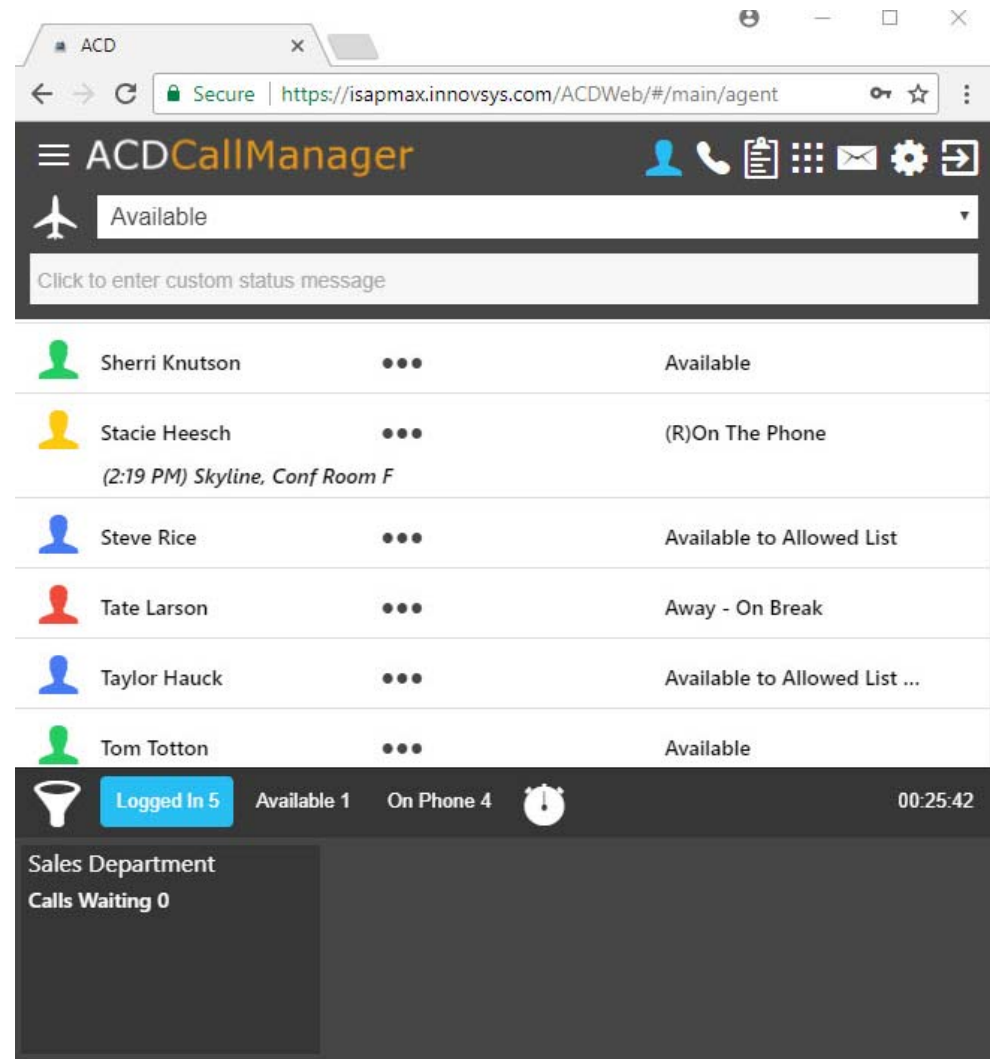
Status Definitions - *Continued*

- Available: Your phone will ring

- Available as Needed: Your phone will ring if all other Agents are unavailable

- Available to Allowed List: Only numbers from your Allowed List will ring to your phone - Programmable from the Options Menu

- Available to Allowed List and Direct Dials: Calls from allowed list, and calls to your direct number will ring to your phone

👤 Sherri Knutson	•••	Available
👤 Stacie Heesch	•••	(R)On The Phone
(2:19 PM) Skyline, Conf Room F		
👤 Steve Rice	•••	Available to Allowed List
👤 Tate Larson	•••	Away - On Break
👤 Taylor Hauck	•••	Available to Allowed List ...
👤 Tom Totton	•••	Available

≡ ACDCallManager 👤 📞 📋 ⊞ ✉ ⚙ ⇥

✈ Available ⌄

Click to enter custom status message

You can enter a "Custom Status Message" that other agents in the call center can view

Definable by the Service Provider – *Please contact our office for status setting changes*
- Away - At Lunch: No calls will ring to your phone during this setting
- Away - In a Meeting: No calls will ring to your phone during this setting
- Away - On Break: No calls will ring to your phone during this setting
- Away – Working on a Project: No calls will ring to your phone during this setting
- Non-ACD Outbound Call: Agent originates a call from the dial pad on phone – Calls with this status setting will not be displayed in the ACD Reports

In-Call Options

Activate these options by left-clicking on three dots next to the agent and select one the following options in the drop-down menu

- Blind Transfer
- Private Call
- Conference
- Send to VM

Important Note:

Designated supervisors can have additional options to Listen to Agent calls and to override their availability status. Please contact our office to add these options to an Agents Call Manager.
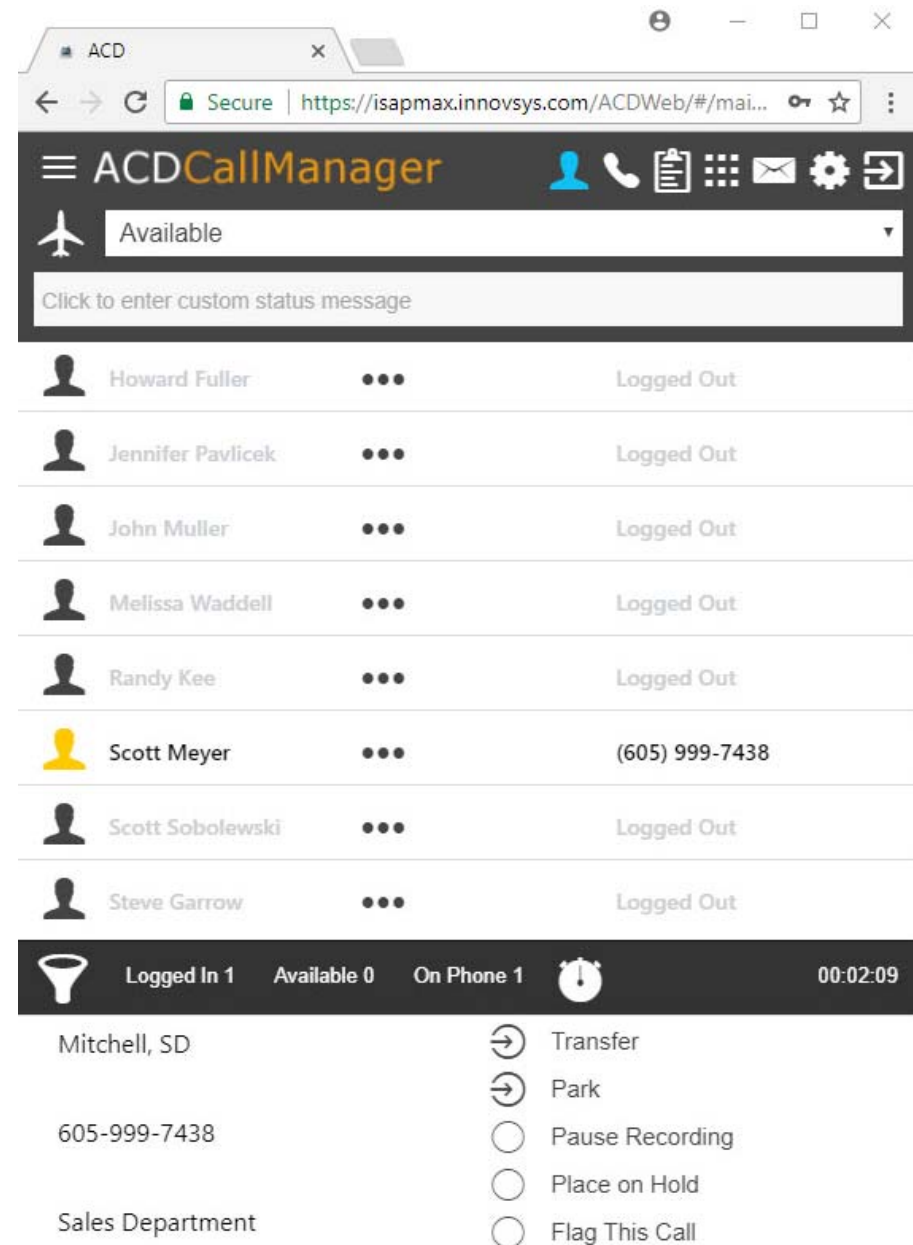
In Call Options - Definitions

- **Blind Transfer:** This allows an agent to transfer a customer call to another agent. Once the call has been transferred, the agent can no longer access the call. Left click on the three dots next to the Agent who you want to receive the Blind Transfer and then left click on Blind Transfer.

- **Private Call:** The customer is on hold so that the agent can speak privately with another agent. The customer can then be let back into the conversation. Left click on the three dots next to the agent you want to talk to, select Private Call and then Left click to make the Private Call. The caller will be automatically Placed on Hold. Click on Place on Hold to bring the Caller back into the call.

- **Conference:** The caller, agent and another selected agent are all placed in a Conference Call. Left click on the three dots next to the agent you want to Conference with, select Conference and then Left click to make the Conference Call. The Transferring Agent can hang up any time Any of the three parties can hang up after the Conference Call has been established.

- **Send to VM:** This will direct the caller to the voice mailbox of a selected agent. Left click on the three dots next to the agent who you want to receive the voicemail and then Left click on Send to VM and the caller will be sent directly to the agent's voice mailbox.

Incoming Call

- Pop-up display

Incoming Call
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isapmax.innovsys.com

- Pick-up phone
- Call in session

Incoming Call - In Session

Caller Interactions

- Transfer – You can use the Call Manager to send Callers to other Call Center Agents

- Park – Allows you to Park a caller who can be taken out of Park by any Call Center Agents when they click on the Parked icon in the Menu bar. Callers in Park can hear music or other announcements.

- Pause Recording – Stops Recording of an in-progress call

- Place On Hold – Callers On Hold can hear music or other announcements. This caller is not in Park and can only be retrieved by the agent that placed them on Hold.

- Flag This Call - Will be noted as Flagged Call in the ACD Call History and in the database report

Incoming Call - Transfer Actions

The ACD Call Manager gives you several options for transferring your calls, clicking on the Transfer arrow icon will open a transfer options pane which will allow you to:

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 📋

Assisted Transfer Options include:
- Place caller on hold
- Agent talks to third party
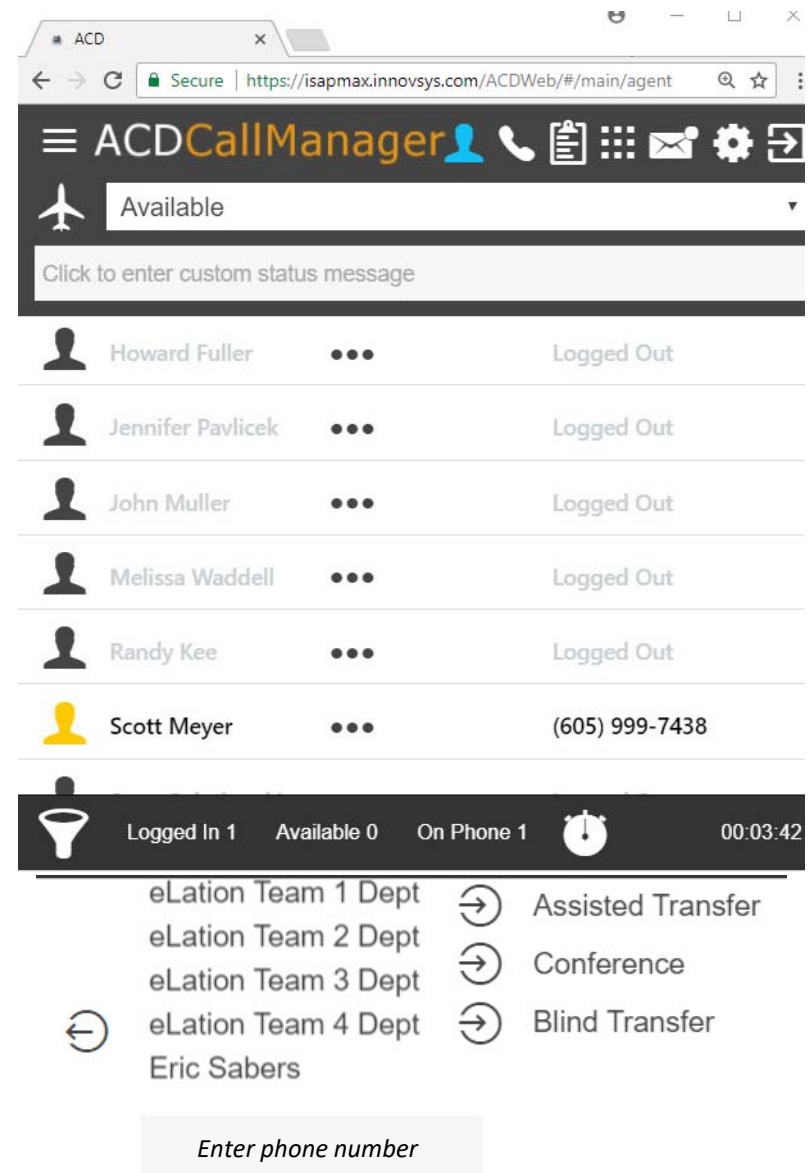- Agent takes caller off hold

Conference
- Make a conference with caller/agent/third party

Blind Transfer
- Connect the caller and third party

Clicking on the back arrow icon will take you back to the previous pane.

Incoming Call - Assisted Transfer

- Transfer to any 10 – digit number (you must include the Area Code)

- Transfer to Any ACD department or Agent

- Transfer to Anyone in Your ACD Contacts 📋

  then

- Select Assisted Transfer

  - The Caller is automatically Placed on Hold allowing the Transferring Agent and the Third Party to communicate privately.

  - Click Place on Hold to take Caller off hold and connect the Transferring Agent, Third Party and the Caller into a Conference.

  - The transferring Agent can hang up any time after the three way call has been established.

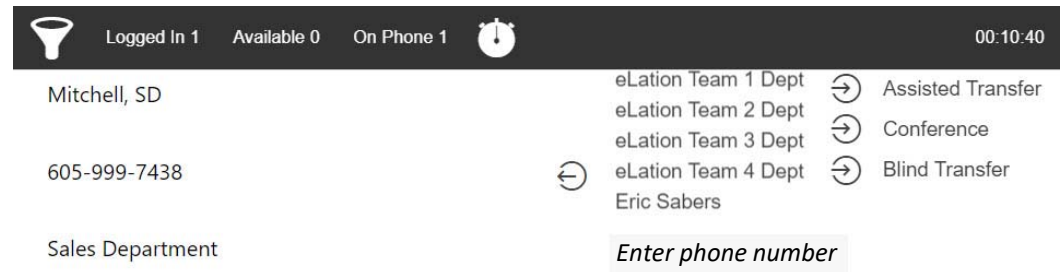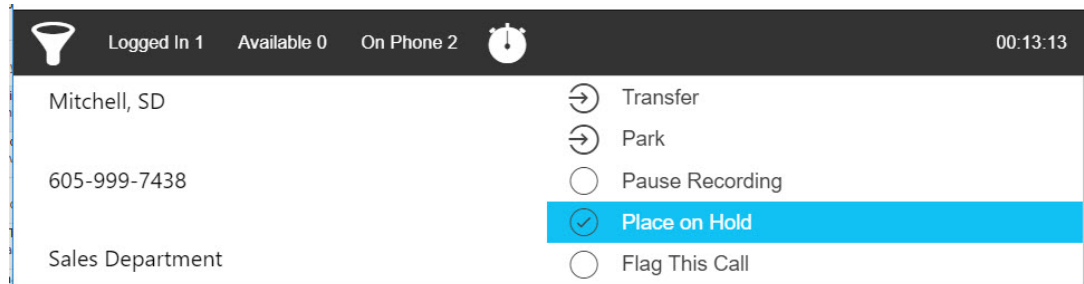| Logged In 1 | Available 0 | On Phone 1 | 🕛 | | 00:10:40 |

Mitchell, SD

605-999-7438

Sales Department

eLation Team 1 Dept → Assisted Transfer
eLation Team 2 Dept → Conference
eLation Team 3 Dept
← eLation Team 4 Dept → Blind Transfer
Eric Sabers

Enter phone number

| Logged In 1 | Available 0 | On Phone 2 | 🕛 | | 00:13:13 |

Mitchell, SD

605-999-7438

Sales Department

→ Transfer
→ Park
○ Pause Recording
✓ Place on Hold
○ Flag This Call

Cancel Transfer Option → Cancel Transfer
An Agent may Cancel the Assisted Transfer prior to the Third Party answering the call by clicking on the Cancel Transfer arrow.

Incoming Call - Conference

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 📋

   then

Select Conference
   - The Caller, Transferring Agent and Third Party are all Placed in a Conference Call.
   - The Transferring Agent can hang up any time after the three way Conference Call has been established.

Cancel Transfer Option   ⊙→   Cancel Transfer
An Agent may Cancel the Conference Transfer prior to the Third Party answering the call by clicking on the Cancel Transfer arrow.

Incoming Call – Blind Transfer

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
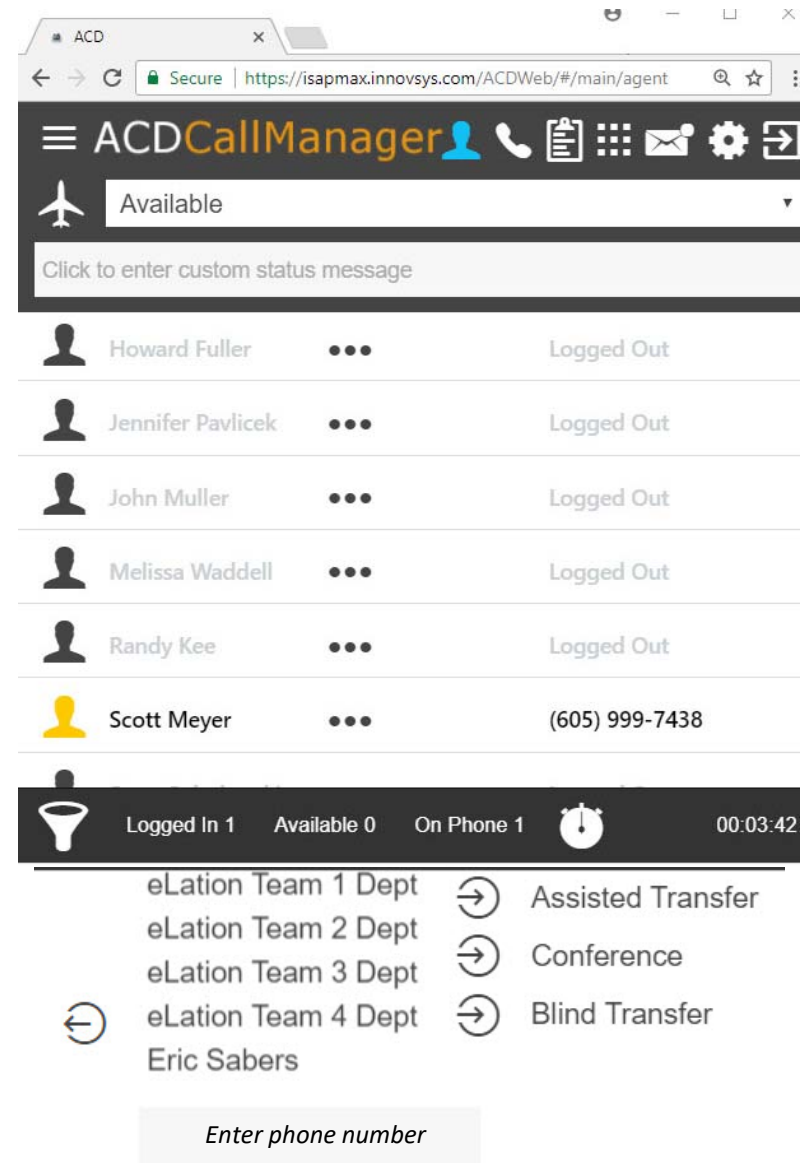- Transfer to Anyone in Your ACD Contacts 📋

  then

Select Blind Transfer
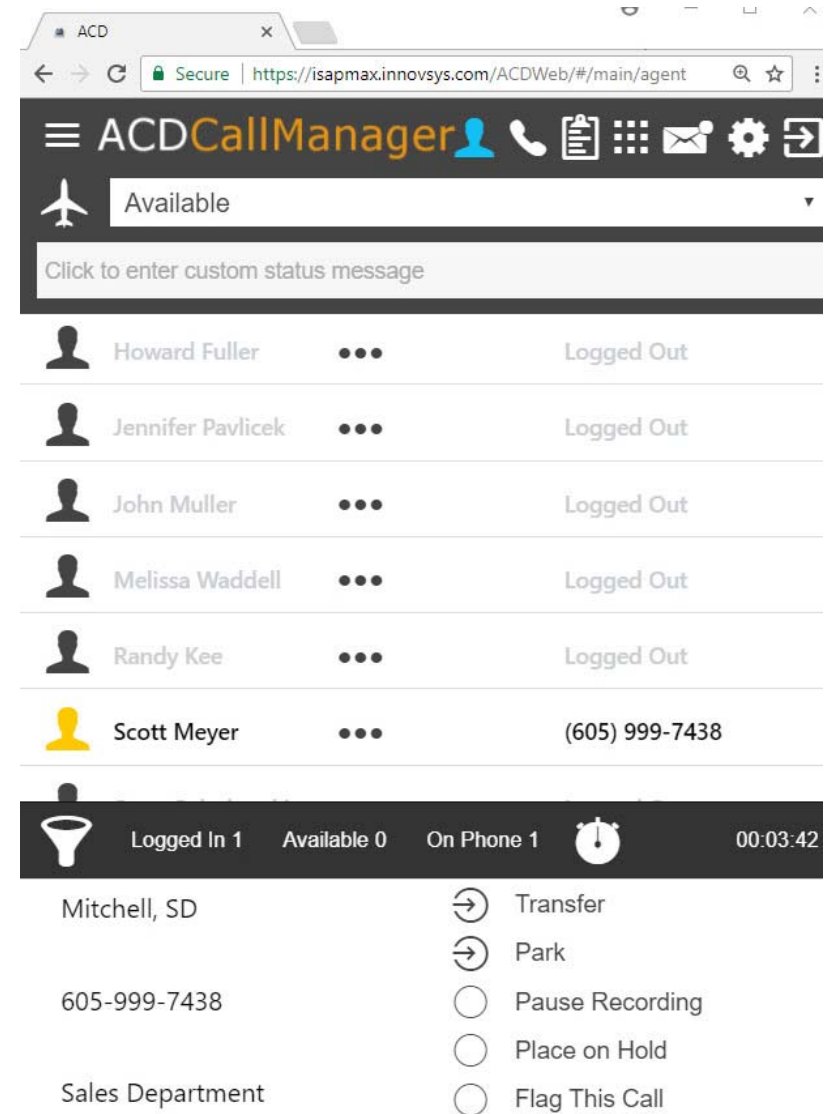
- The Caller is then automatically Transferred. Once the call has been transferred, the agent no longer may access the call.
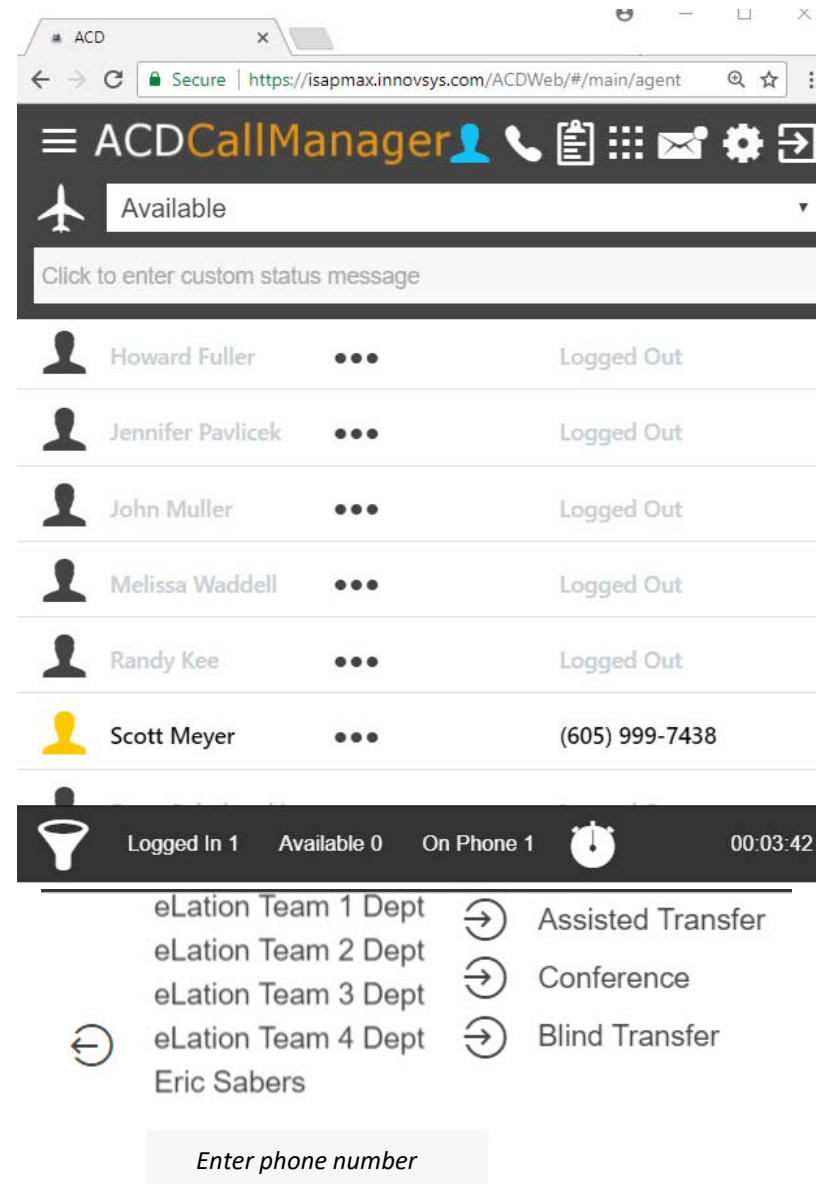
Incoming Call - Parked Call

Call Park within ACD allows you to put a caller on hold with the ability to be taken out of hold by any agents in the Call Center by clicking on the Parked icon in the Menu bar.

- To place a Caller in Park, select Park which will open a pane that allows you to write a note relating to the Caller you are putting in park.

- Enter the note

- Select Park

Incoming Call - Parked Call Retrieval

- 📞Click on the Parked icon in the Menu bar to open the list of all Parked Calls

- If the caller doesn't get retrieved in a specific amount of time, ACD will send the caller back to the original Agent. Please contact our office if you need to edit the Call Park time.

- Hover over Note to read the Note.

- Click on the Retrieve icon to send the Parked caller to your phone.
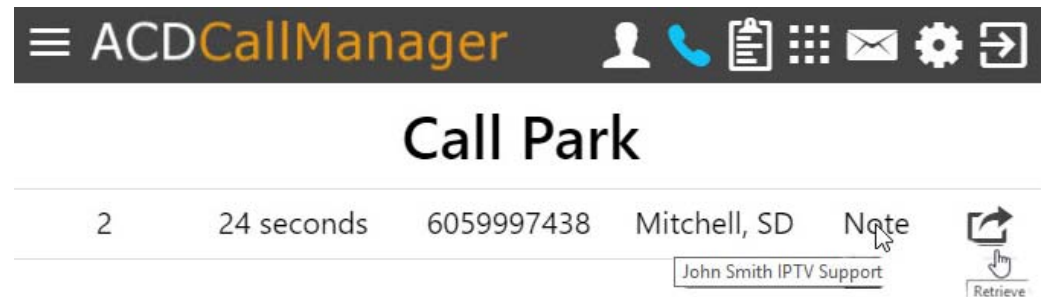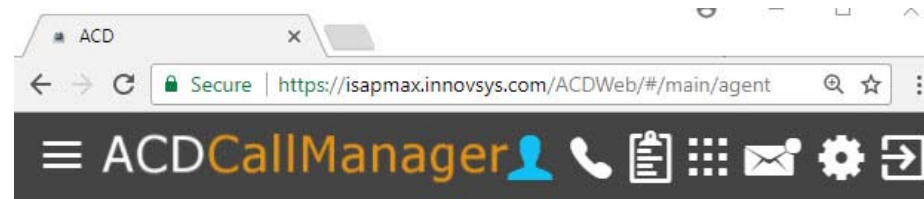
Incoming Call - Pause Recording

- Click on Pause Recording to stop the recording that is captured by the ACD Service.

- Click on Pause Recording a second time to resume recording.
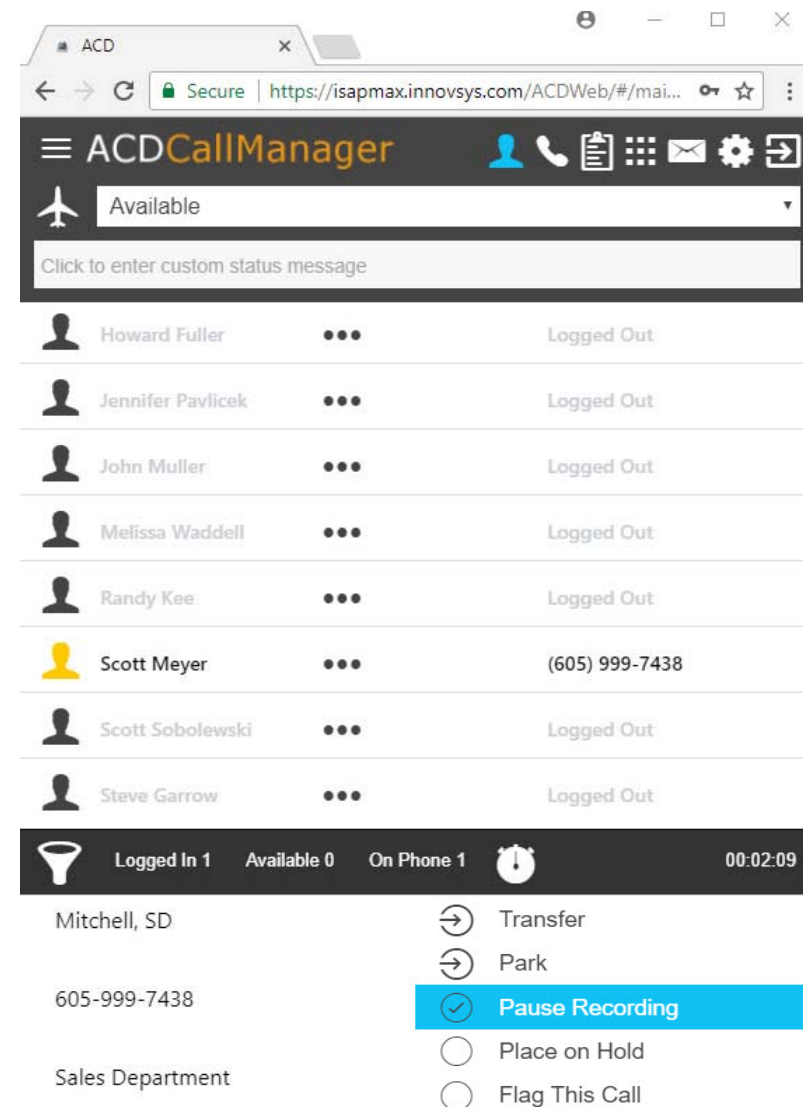
Incoming Call - Place on Hold

- Click Place on Hold to put a Caller on hold where they can hear music or other announcements

- Click Place on Hold a second time to speak to the caller

- Please contact our office to request changes to your on hold announcements

Incoming Call - Flag this Call

- Clicking on Flag this Call will Flag Calls in your Call History and in the report database

- Recordings of Flagged calls cannot be deleted

- You must contact our office to have a Flagged call recording deleted
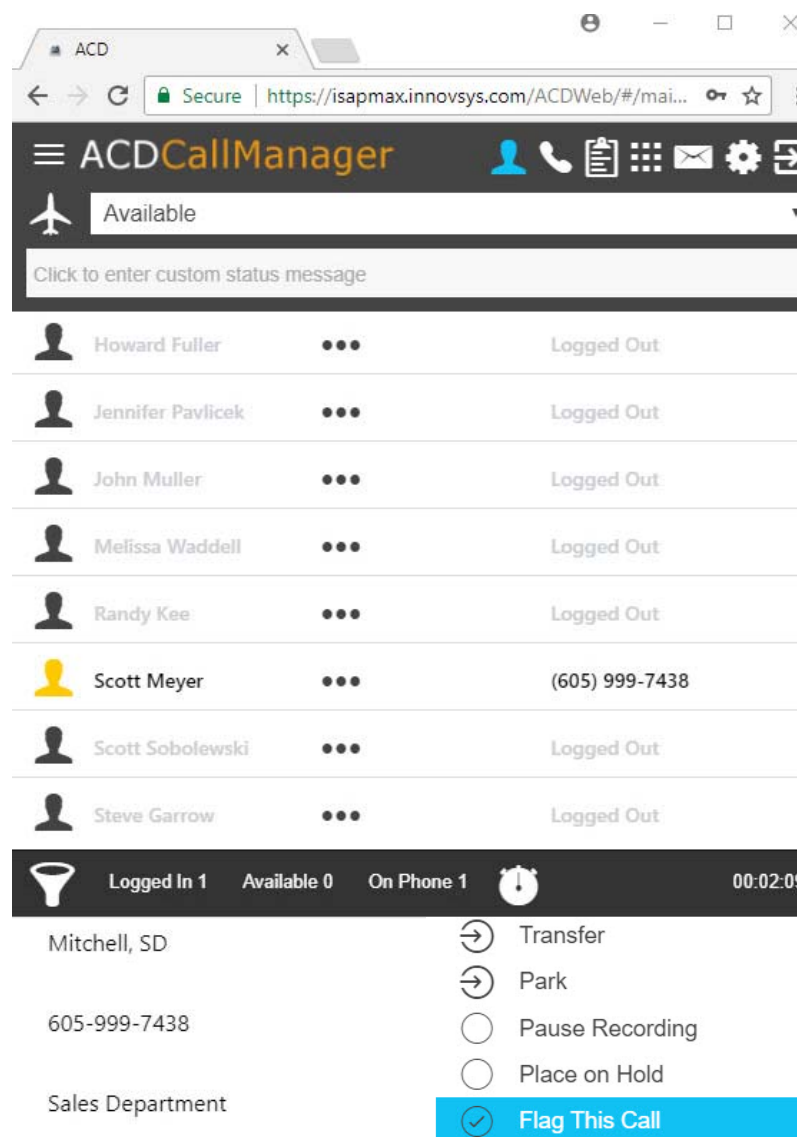
Outgoing Calls
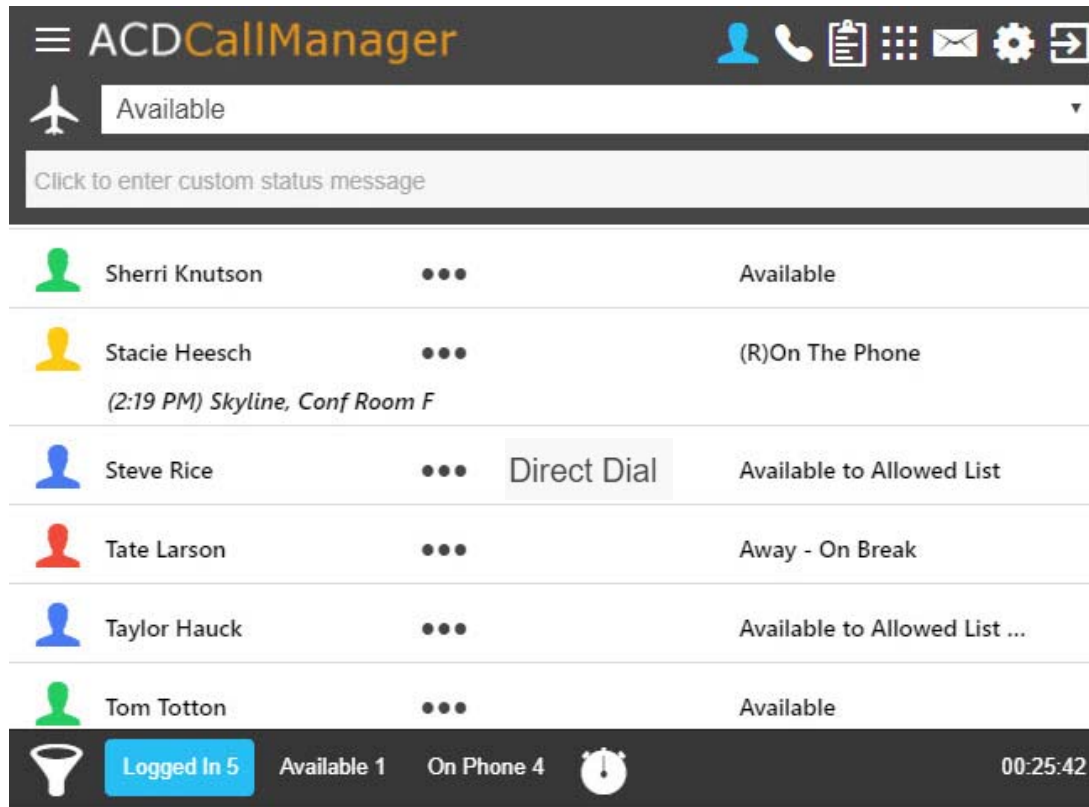
You can make outbound calls that will be recorded and included in the service reports

- ⊞ Click on the Dial Pad icon to open your Dial Pad

- You can use your keyboard to enter a number in the "Click to enter phone number field", or you can click on the numbers in the Dial Pad.

- Click on the Green Phone icon, your phone will ring, pick up, and the call will be completed.
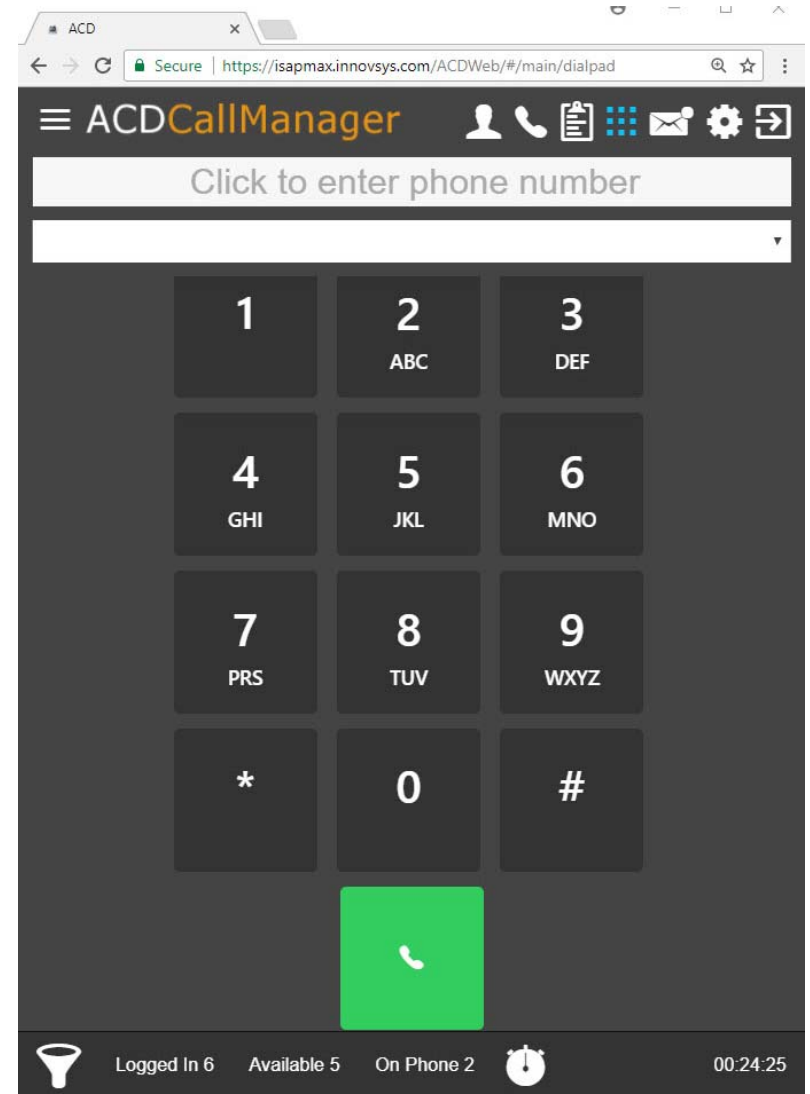
Outgoing Calls – Direct Dial to Other Agents

- Left click on the three dots next to the agent you want to call and select Direct Dial. Your phone will then ring, pick up and you will be connected to the selected agents phone.

Wrap-up – End of Call

After a completed call an End of Call screen will open giving Agents the opportunity to document the Call activity

- At the End of Call an Agent can choose default activity options from the drop down menu.

- Please contact our office if you need to edit your default options.

- Specific Notes on a call can be typed in by the Agent.

- Clicking on Save will close the End of Call window and store the info in the reporting database.

- Choosing No Wrap-up Code will close the End of Call window and reflect the designation in the reporting database

- End of Call will display the amount of time in seconds to complete the Wrap-up. Please contact our office to modify the Wrap-up Code time.

End of Call - 25

Follow-up Required
Resolved

Call back in 10 days

Save

No Wrap-up Code

Viewing Departments and Waiting Lists

- Supervisors and Agents assigned to multiple departments can view other departments from the Call Manager by clicking the Funnel icon and then clicking on the Department(s) they would like to view. Click on the Funnel icon a second time to close the selection screen and display the newly selected Departments.

- Supervisors and Agents assigned to multiple departments can add departments to Call Waiting Lists. Click on the Stopwatch icon and select the Departments you wish to add and they will be displayed at the bottom of your Call Manager. Click on the Stopwatch icon a second time to close the selection screen

- Call Waiting Lists will show you Departments that have people waiting on hold and also how long they have been waiting. Supervisors and Agents assigned to multiple departments can access all (Supervisor) and assigned (Agent) department Call Waiting Lists to monitor and potentially take calls from contacts in the waiting list.

Please contact our office to add new supervisors or agents to multiple departments.
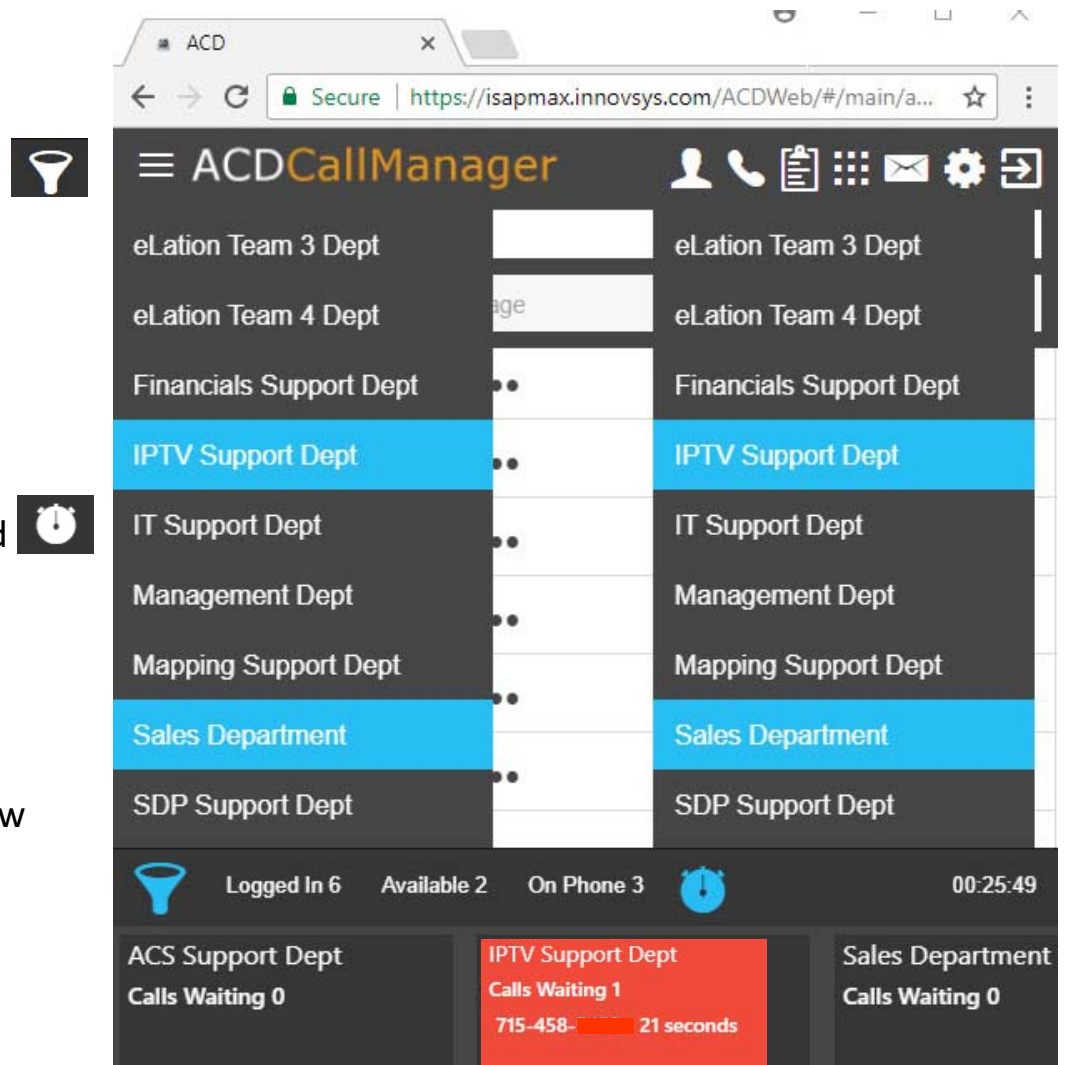
Click on a caller waiting in Queue and you will be prompted before the caller is sent to your phone.

Viewing ACD Departments and Waiting Lists

Agent Status Update Buttons

- You can click on Logged In, Available, or On Phone to update your Call Manager to show Agents who are Logged In, Available, or On Phone.

- When you click the Status Update button to Blue, your Call Manager will display Agents who are Logged In, Available, or On Phone.

- When you click the Status Update button to Red, your Call Manager will display Agents who are Not Logged In, Not Available or Not On Phone.

- If neither Blue or Red are displayed, your Status Update buttons are not activated.

Contacts

Contacts Menu

📋Click on the Clipboard icon to open your Contacts Menu. In the Search field contacts can be easily searched by just typing a few letters of a name or phone number or by entering the ten digit number. To the left of the search contacts field, you can click on the + icon to add new contacts. By clicking on the Folder icon you can import contacts from a spreadsheet.

There are four main options in the Contact menu:

- 👤**Contacts –** Contains your call center agents and any other contacts that you have added. From this screen you can make calls, edit contacts, listen to and download call recordings from the last 28 days.

- 🕐**Recent Calls –** List of recent calls. From this screen you can make calls, edit contacts, listen to and download call recordings from the last 28 days.

- ⊖**Missed Calls** – List of unanswered calls. From this screen you can make calls and edit contacts.

- ⭐**Favorites –** List of favorite contacts designated by the agent. From this screen you can make calls, edit contacts, listen to and download call recordings from the last 28 days.

Very Important: It is imperative that you click on the Log Out icon instead of closing the browser when you leave the Call Center.
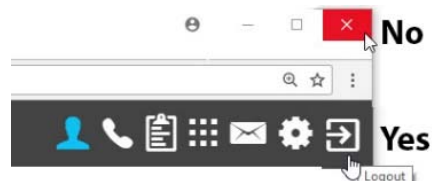
The service will not retain new contact information or call activities if you don't use the Log Out button.
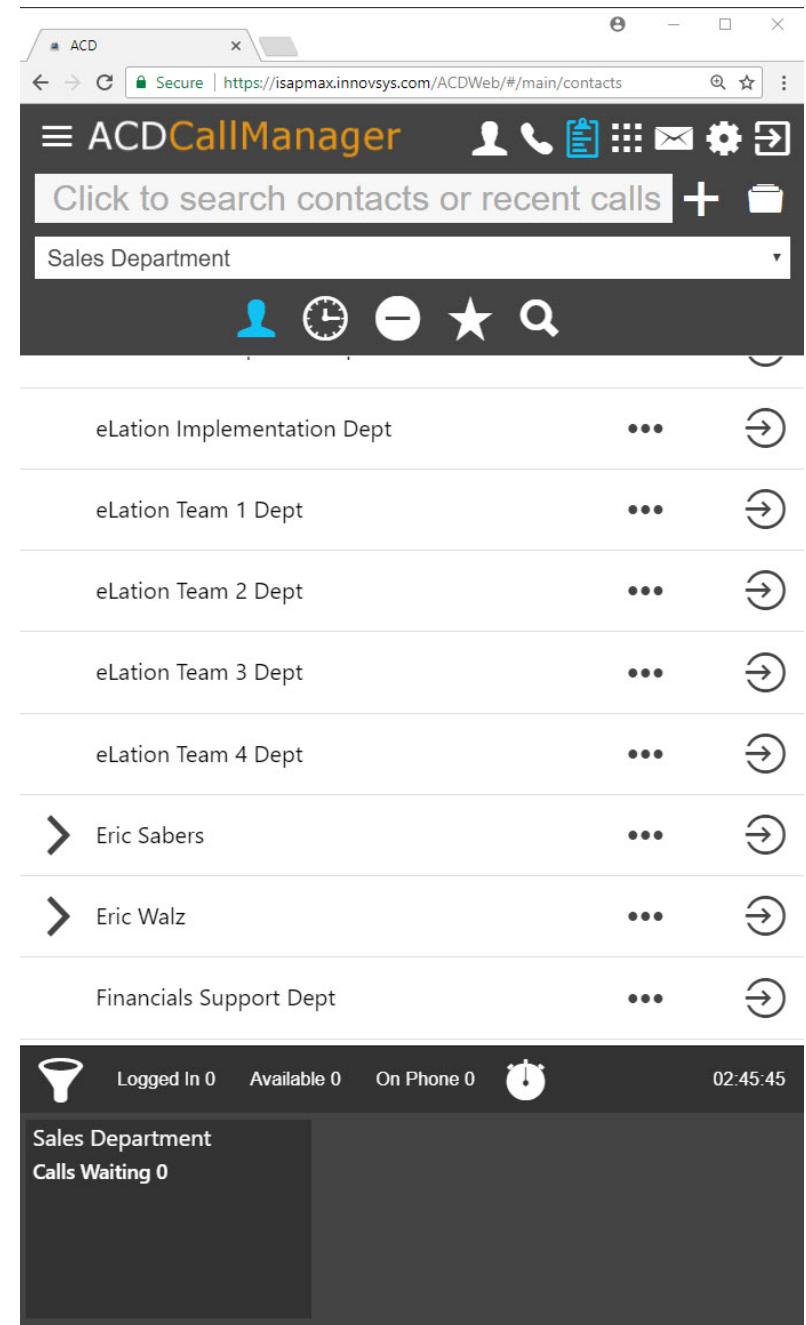
Contacts – Adding New Contacts

 To add a new contact click on the + icon to open the Edit contact window.

From this screen you can enter the Name, Description (home, cell, office) and Phone Number including area code for your new Contact. Clicking on the **x** icon will remove all of the information from the description and phone number fields next to the **x** icon. Click on the **+** icon to add up to five phone numbers with descriptions to be associated with this contact. Clicking on the circle ✓ will turn it Blue and make that specific phone number a priority number that will be called first when you click to call using the contact name in the Click to search contacts bar.
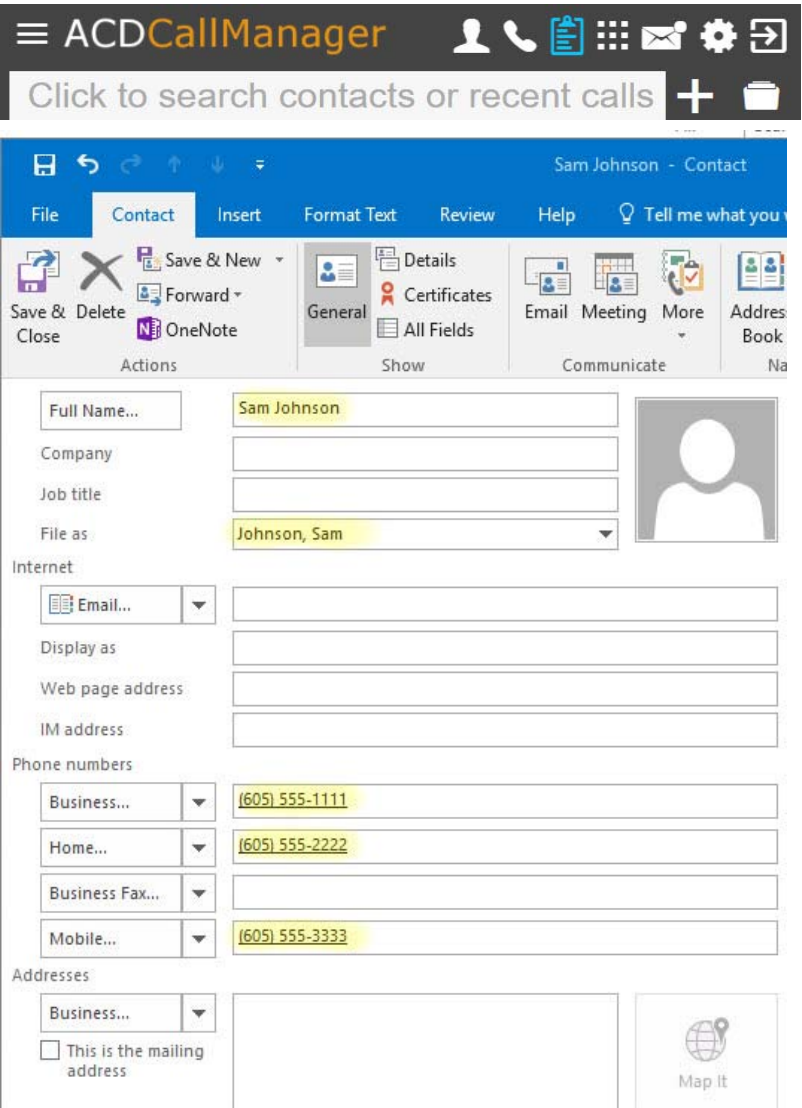
Clicking on delete will remove ALL contact information, click on Save when you have finished. **Important:** You need to Log Out ⏻ of your Call Manager to permanently add the new Contact.

Contacts – Import Contacts

The Import feature allows you to add a list of Contacts to your Contact List. The most common source for importing contacts is from your Outlook email account.

It is important that your Outlook contacts include the highlighted fields in this example to allow the ACD service to correctly import the data. The highlighted fields are the only ones that the ACD Call Manager will import, but you can use all of the other fields in the Outlook Contact Card as you normally would.

Create a contact export file by using the Outlook Import and Export wizard and select Export to a file. You must use Comma Separated Values. Follow the wizard directions to complete this task.

Contacts – Placing Calls

Once you have found your contact in any of the Contact menu options (Contacts, Recent Calls, Missed Calls, or Favorites), Left click on the three dots next to the contact that want to you want to call, then Left click on Place Call. Your phone will ring, pick up and the call to the selected contact will be completed.

You can also enter a name or phone number of one your contacts in the Click to search…. Bar and press enter on your computer keyboard. Your phone will ring, pick up and the call to the selected contact will be completed. If a contact has multiple numbers by default, the call will be placed to the first number displayed in the edit contact list unless the contact has a number checked as a favorite, in which case the favorite will be called.
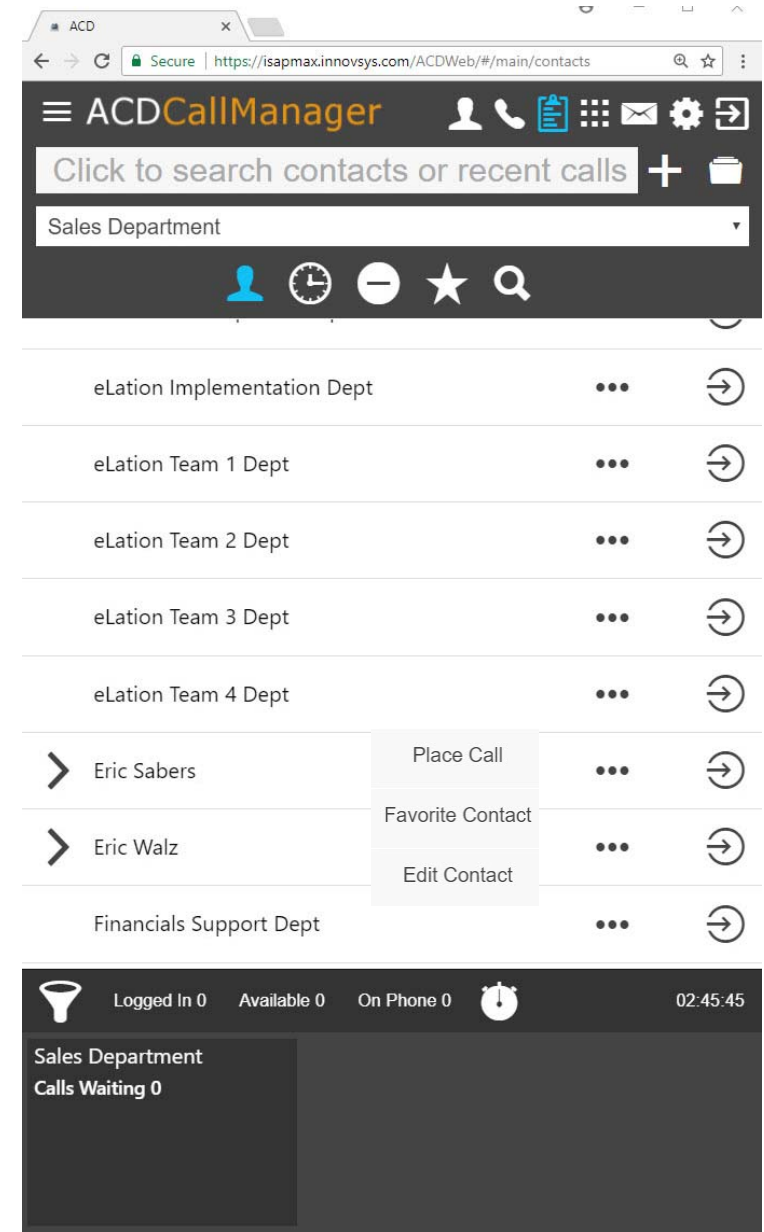
Contacts – Creating Favorites

Once you have found your contact in any of the Contact menu options (Contacts, Recent Calls, Missed Calls, or Favorites), Left click on the three dots next to the contact, then Left click on Favorite Contact to add this contact to your Favorites list.

Very Important: It is imperative that you click on the Log Out icon instead of closing the browser when you leave the Call Center.
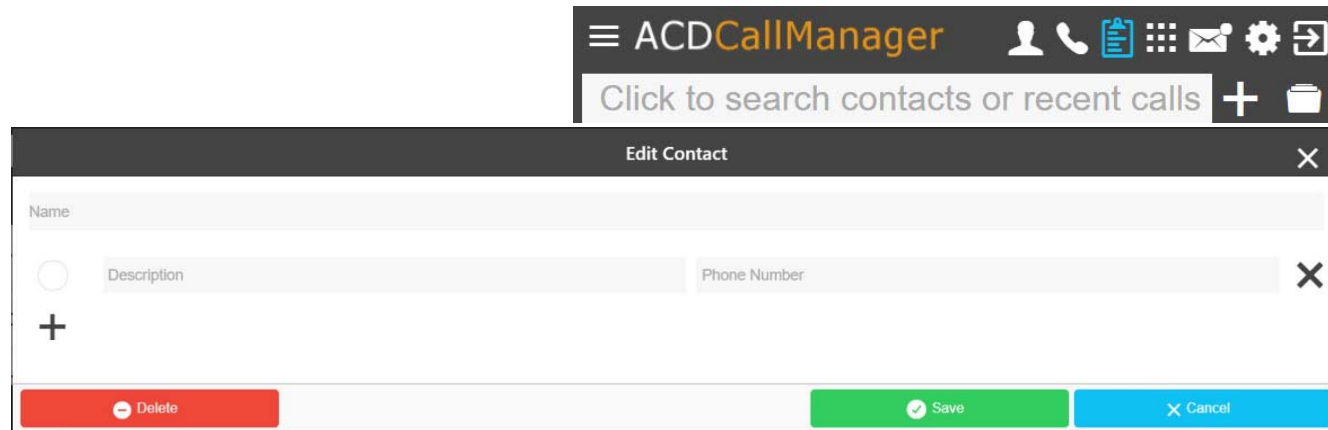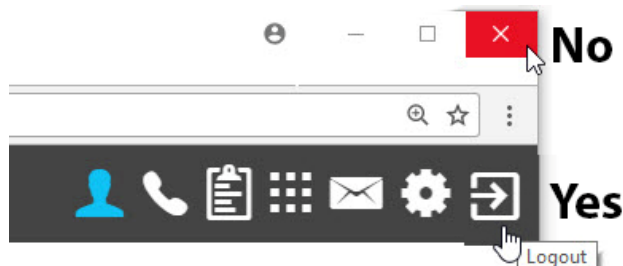

The service will not retain new contact information or call activities if you don't use the Log Out button.
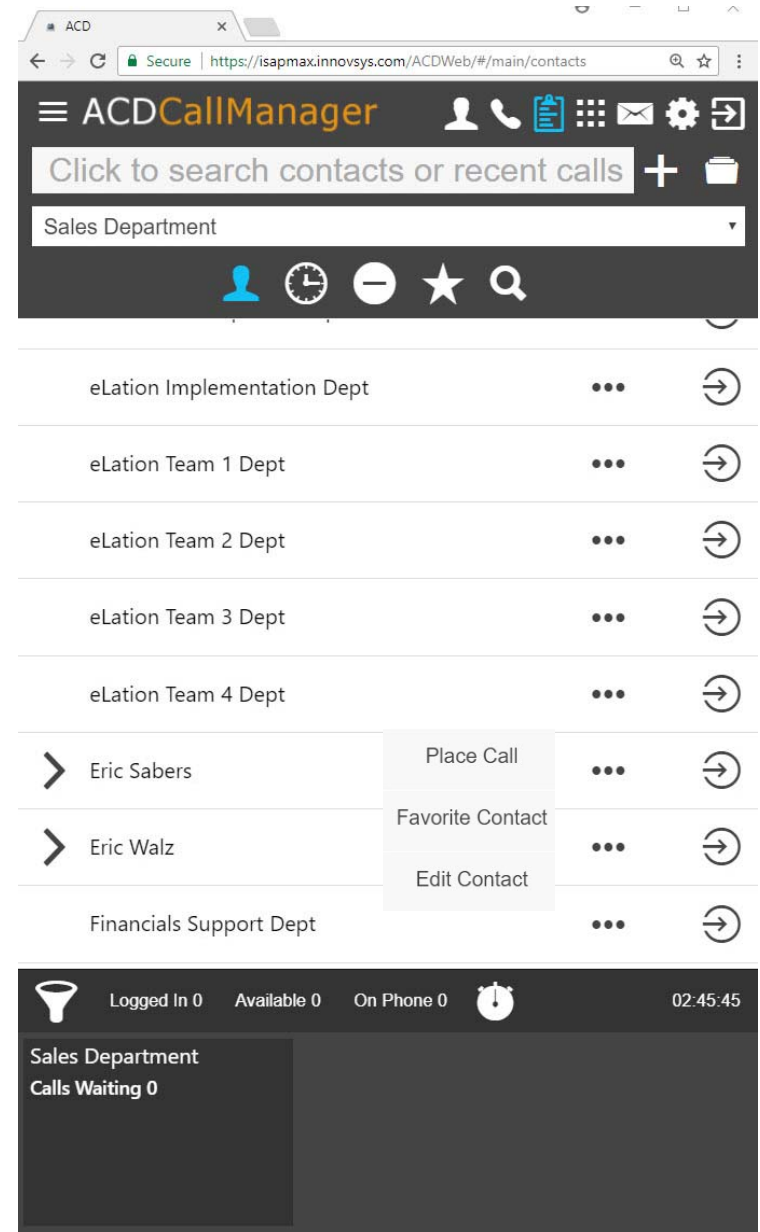
Contacts – Editing Contacts

Once you have found your contact in any of the Contact menu options (Contacts, Recent Calls, Missed Calls, or Favorites), Left click on the three dots next to the contact, then Left click on Edit Contact to open the Edit Contact screen.

From this screen you can edit any contact information associated with your existing contact. Clicking on the **x** icon will remove all of the information from the description and phone number fields next to the **x** icon. Click on the **+** icon to add up to five phone numbers with descriptions. Clicking on the circle ✓ will turn it Blue and make that specific phone number a priority number that will be called first when you click to call using the contact name in the Click to search contacts bar. Clicking on delete will remove ALL contact information, click on Save when you have completed the edits. **Important:** You need to Log Out ⮡ of your Call Manager to permanently add the new Contact.
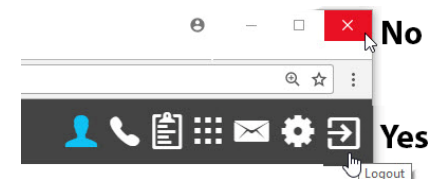
Agent Admin Options

⚙ Click on the Options icon in the Menu bar to access and manage your Allowed List, Extension Dialing, your After Hours Number and how you want to be notified of Incoming Calls.

- Create/edit Allowed List

- If the Call Center has extension dialing, create and expand for either 3 or 4 digit expansion numbers

- ✈ Remote Number
  - Allows Agent to be reached at a Remote number
  - Clicking on the Airplane icon allows the Agent to switch to a Remote number

- Incoming Call Behavior
  - Allows agent to select Incoming Call Notification:
    - Activate Console - Call Manager Pop-Up
    - Display Notification - Caller ID Display Pop-Up

Agent Admin Options – Allowed List

Scott Meyer ●●● Available to Allowed List

Allowed List – Up to 5 Entries

Enter the Phone Number or range of numbers to your Allowed List

- An Agent can enter a single number, an area code/exchange, or a whole number range.
  - 6055558888
  - 605
  - 6055550100-6055550200

Click the + icon to add the number(s) or range(s) to your Allowed List, click the x icon to remove one from your list. Click Save when you have finished.

Once you have entered numbers to your Allowed list and your status is set to Available to Allowed List those will be the only numbers that you will receive in the Call Center

Allowed List

6055558888 +

Will allow only the number 605-555-8888

605 +

Will allow any numbers in the 605 area code

605555 +

Will allow any number with an NPA/NXX of 605-555

6055550100-6055550200 +

Will allow any number between 605-555-0100 and 605-555-0200

Save

≡ ACDCallManager

✈ Available to Allowed List
Available
Available As Needed
Available to Allowed List
Available to Allowed List or Direct Dialed
Not Available
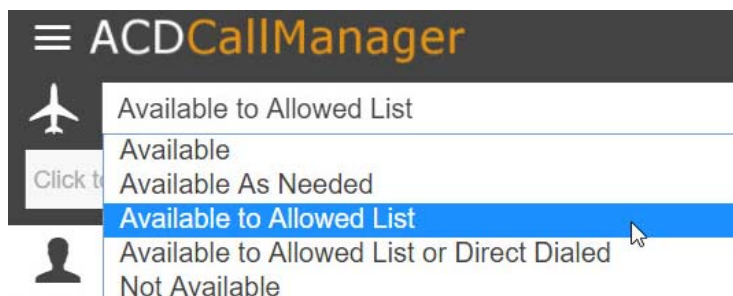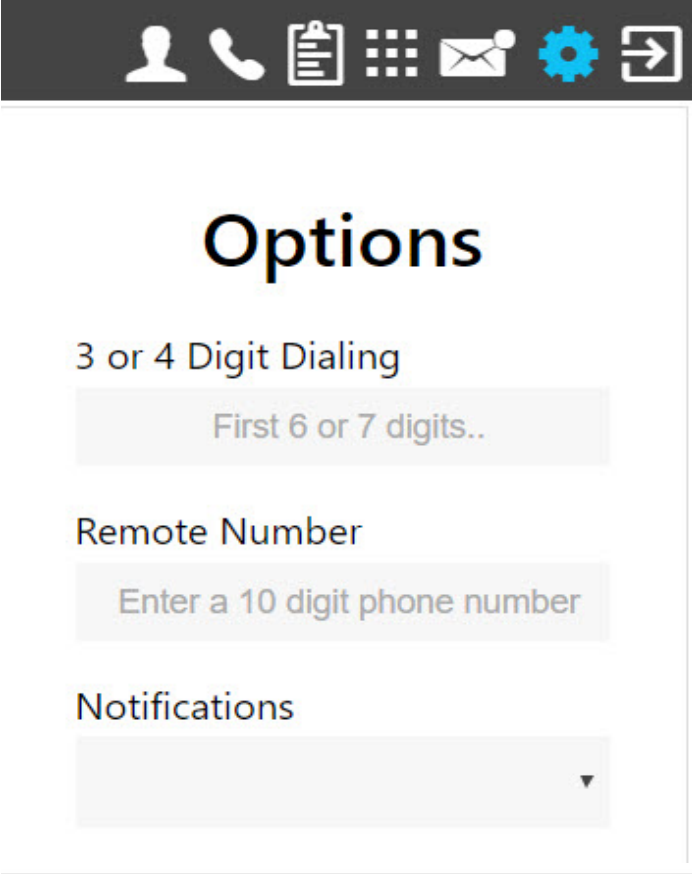
Agent Admin Options - 3 or 4 Digit Dialing

3 or 4 Digit Dialing

- If your Call Center has extension dialing, ACD allows you to create either 3 or 4 digit dialing to other Call Center agents from your phone.

- Enter the first 6 digits of the phone numbers in your Call Center for 4 digit dialing or the first 7 digits for 3 digit dialing.

- For example if you enter the first 6 digits of your call center agents, when you dial 1234, you will actually be calling 605-555-1234.

                    or

- If you enter the first 7 digits of your call center agents, when you dial 234, you will actually be calling 605-555-1234

- Click Save to set your 3 or 4 digit dialing feature.

Options

3 or 4 Digit Dialing
First 6 or 7 digits..

Remote Number
Enter a 10 digit phone number

Notifications
▼

Save

Agent Admin Options – Remote Number

Remote Calls

To receive calls at a number different from your normal office number, enter the 10 digit number that includes the Area Code in the Remote Number field.

- Calls will be forwarded to your designated Remote Number when you select the Airplane icon in your Call Manager.

- Click Save after you have made your selection.

Options

3 or 4 Digit Dialing

First 6 or 7 digits..

Remote Number

Enter a 10 digit phone number
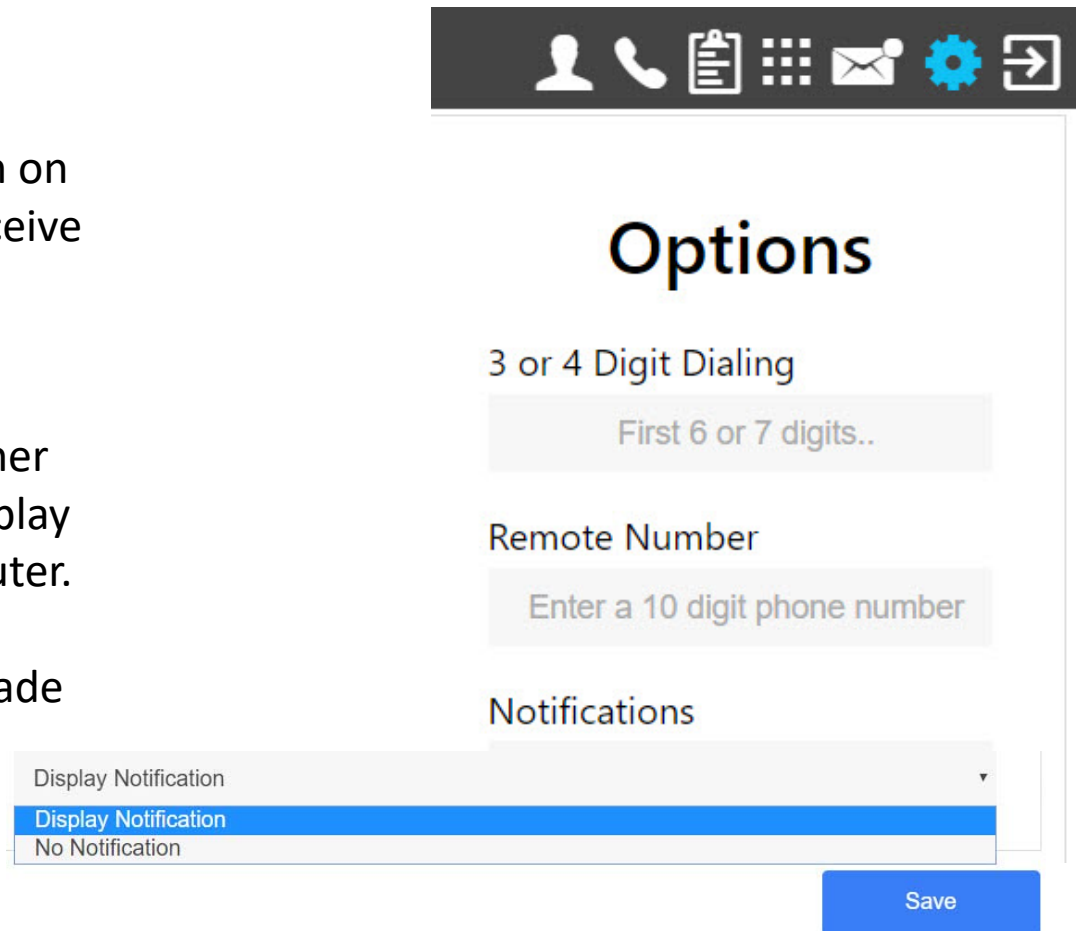
Notifications

Save

Agent Admin Options – Call Notification

Agents have the option of receiving a Pop-Up Notification on their computers when they receive incoming calls.

- Click the Notifications dropdown and select whether or not you want pop-up display notifications on your computer.

- Click Save after you have made your selection.

Options

3 or 4 Digit Dialing

First 6 or 7 digits..

Remote Number

Enter a 10 digit phone number

Notifications

Display Notification ▼

Display Notification
No Notification

Save

Save

Incoming Call
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Recordings – Listening and Downloading

Recordings of previous Agent calls can be accessed from one of the Contact menu options 📋 - Contacts, Recent Calls, Missed Calls, or Favorites.

- Click on ➔ next to the contact whose recording(s) you wish to access.

- Clicking on the Play button of a specific recording will open a recording window that gives you the option to Play the recording over your computer or you can select Download to save the Recording to a local drive on your computer.

- Click on the ← back arrow to return to the previous screen.
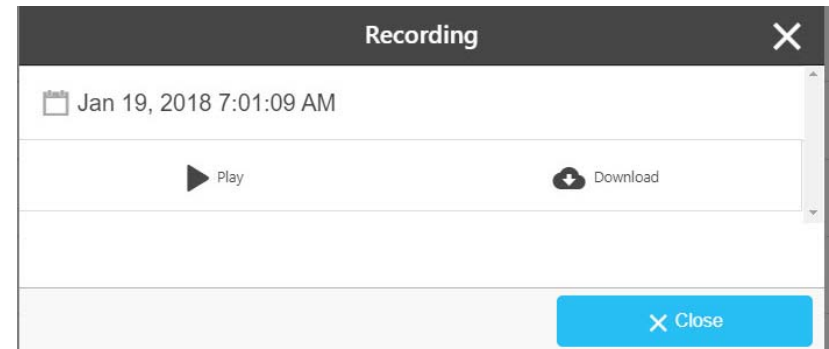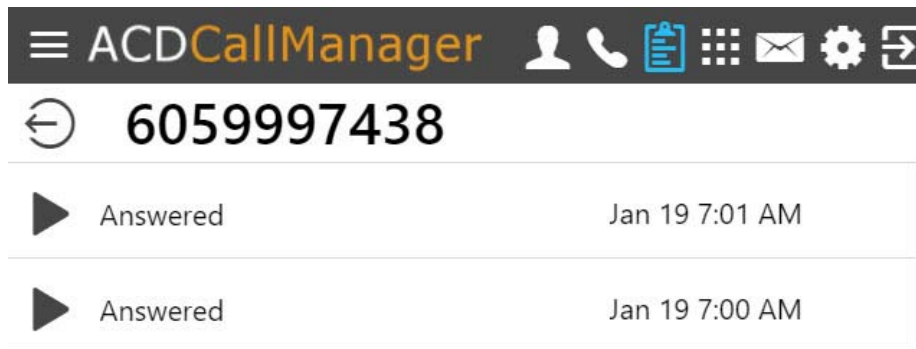
Voicemail

- Click on the Voicemail Icon in the Menu bar to display your messages. A bubble indicator will be displayed next to the icon showing that you have unread voice messages.

- Your Department and individual Agent voice messages will be displayed, click the play button next to the number to listen to the message.

- Click on the Gear icon to manage your voice messages. Archive will save the selected message. Delete will permanently remove the selected message from your voicemail box.
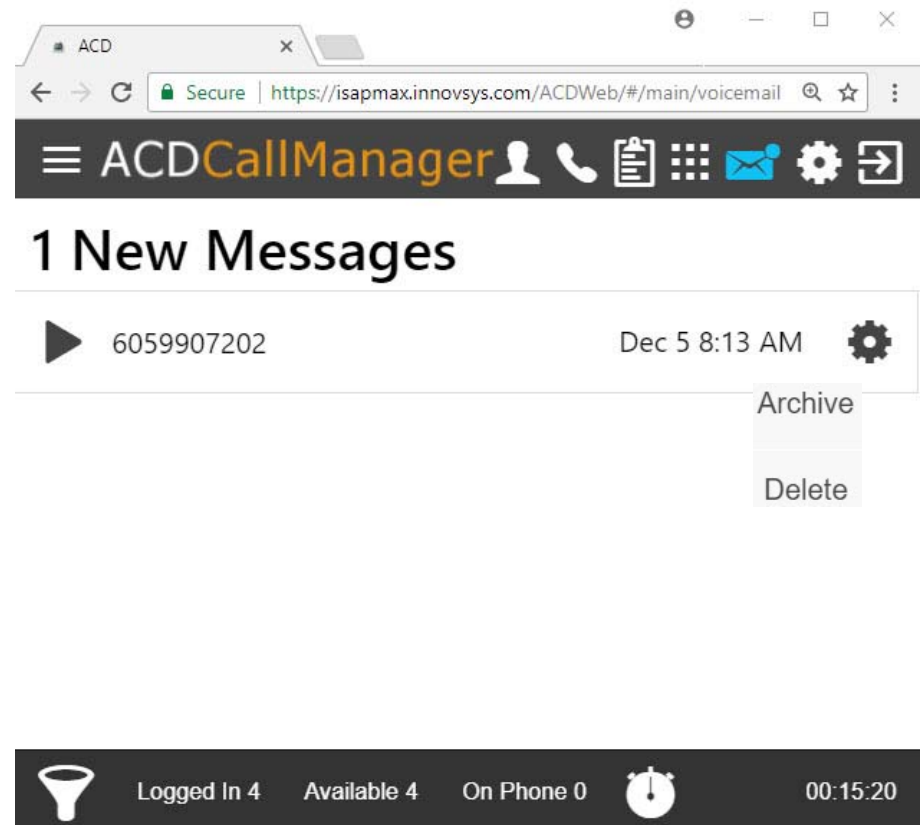
Creating a Custom Call Manager Icon

- Paste your unique HTML5 Call Manager URL into a Google Chrome Browser bar and then click on your internet options. Select More tools and then choose Add to desktop.

- You can now choose to name this browser location creating it's own special icon. After you select Add, close the ACD Call Manager and reopen it from your desktop.

- After you have reopened your ACD Call Manager, go to your Task bar and right click on the new icon and select Pin to taskbar. This will separate it from your Google Chrome browser button making it easier and quicker to open and manage.
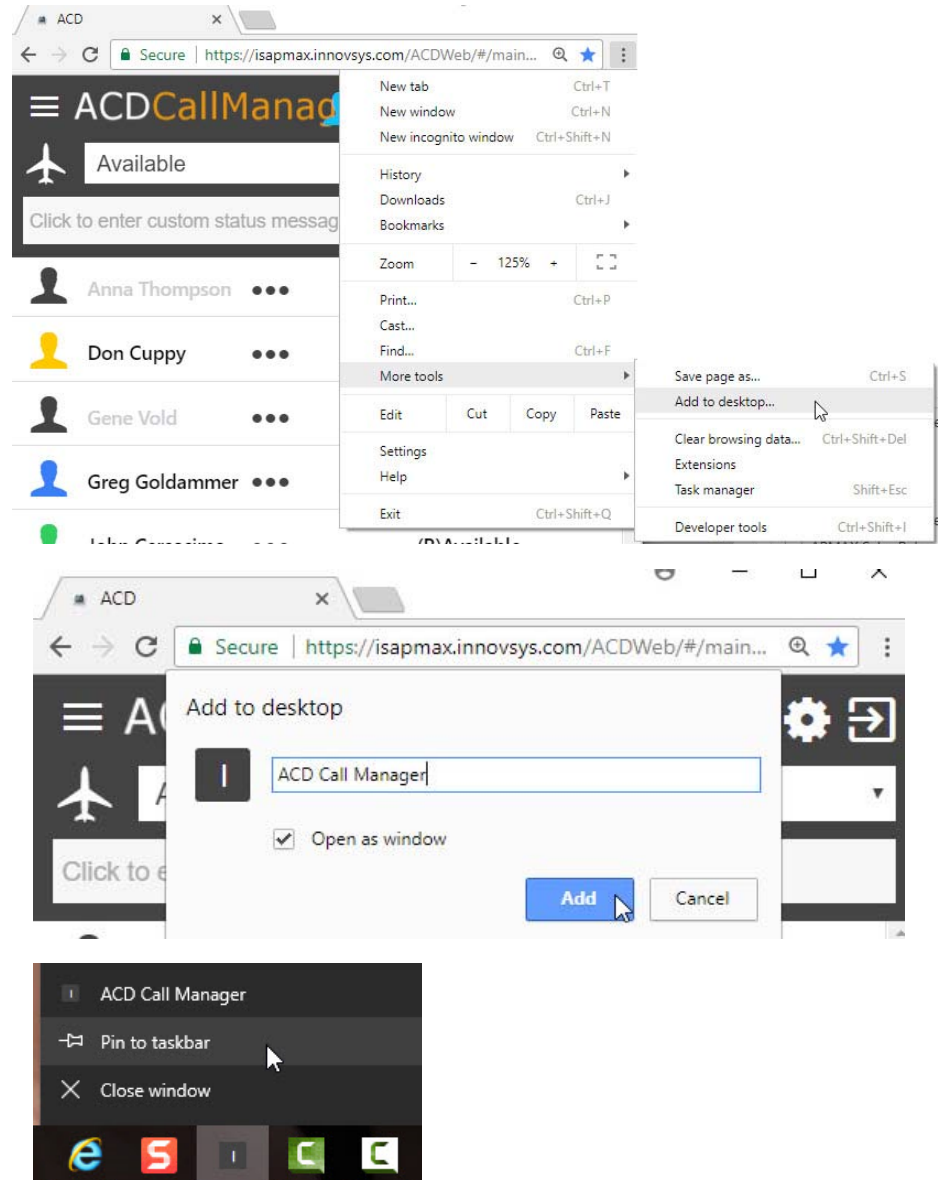
Additional Resources

- The ACD Supervisory Summary Console is a separate URL that monitors Call Center activity and allows users to download any agent recordings for up to the past 28 days. Please contact our office for a copy of the summary guide for this tool.

IS Call Center stats call history

Call Center Statistics 2:00 AM - 1:33 PM

	Agent					Call											
	Total	Signed In	Not Available	In Call	Ready	Total	Queue	Internal	Answered	Missed	Voicemail	Agent VM	Queued	Abandoned	Abandoned Q	Wait Time (Avg)	Length (Avg)
ACS Support Dept	3	3	3	1	0	1	0	0	1	0	0	0	0	0	0	0:00:00	0:02:18
AP Development Dept	18	2	16	0	2	0	1	0	2	0	0	0	0	0	0	0:00:00	0:01:03
eLation Development De	33	3	30	0	3	0	0	1	0	0	0	0	0	0	0	0:00:00	0:00:00
eLation Implementation	7	6	3	0	4	0	0	2	0	0	0	0	0	0	0	0:00:00	0:00:00
eLation Team 1 Dept	8	7	7	2	1	15	9	2	17	0	1	1	0	0	0	0:00:00	0:11:08
eLation Team 2 Dept	9	6	8	1	1	22	6	5	32	2	0	4	0	5	0	0:00:00	0:22:11
eLation Team 3 Dept	9	8	4	1	5	22	5	5	22	1	0	0	0	10	0	0:00:00	0:07:07
eLation Team 4 Dept	9	8	5	0	4	9	4	2	12	0	0	3	0	0	0	0:00:00	0:07:59
Financials Support Dept	10	10	4	1	6	23	8	10	30	2	0	1	0	4	0	0:00:00	0:07:47
IPTV Support Dept	8	5	6	2	2	23	13	3	33	17	2	1	0	6	1	0:00:00	0:13:45
IT Support Dept	4	3	3	1	1	7	1	7	3	1	2	0	0	3	0	0:00:00	0:05:17
Management Dept	7	3	4	0	3	0	0	0	0	0	0	0	0	0	0	0:00:00	0:00:00
Mapping Support Dept	7	5	5	1	2	13	5	0	10	1	0	2	0	4	0	0:00:00	0:13:34
Sales Department	8	1	7	0	1	0	0	0	3	0	0	0	0	0	0	0:00:00	0:22:23
SDP Support Dept	8	6	4	1	4	9	1	4	16	0	0	0	0	3	0	0:00:00	0:11:34
Totals	**148**	**76**	**109**	**11**	**39**	**144**	**53**	**41**	**181**	**24**	**5**	**12**	**0**	**35**	**1**	**0:00:00**	**0:12:25**