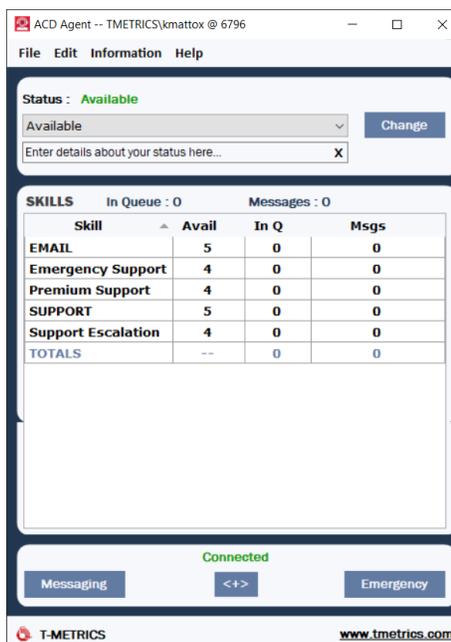


T-Metrics Agent Guide

AGENT MODULE

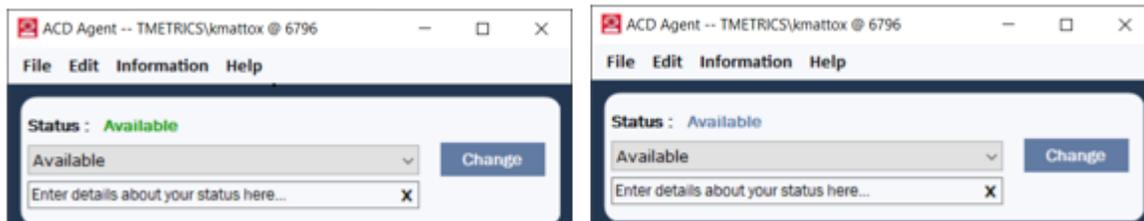
The ACD Agent Module will configure itself in Agent mode, based on the user's login name. When the Agent Module logs onto the ACD Controller Module, the login name is tested to see the job classification of the person logging on. If the person who logs on is only an Agent (as opposed to a Supervisor or an Administrator), then certain functions will be turned off or made inaccessible.

Shown here is the Main Screen of the ACD Agent Module.



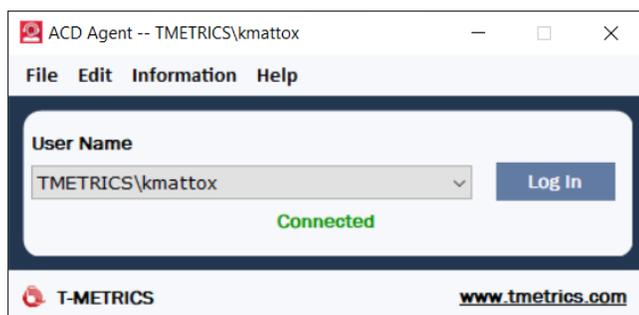
COLOR CODING

Several color-coded signals can be used to easily ascertain information on the T-Metrics ACD Agent Module. For example, when an agent's line is being used (whether the phone is ringing, a caller is on the line, or a caller is on hold) the **Status** indicator will change from a green **Available** to a blue **Available**.



STATUS WINDOW

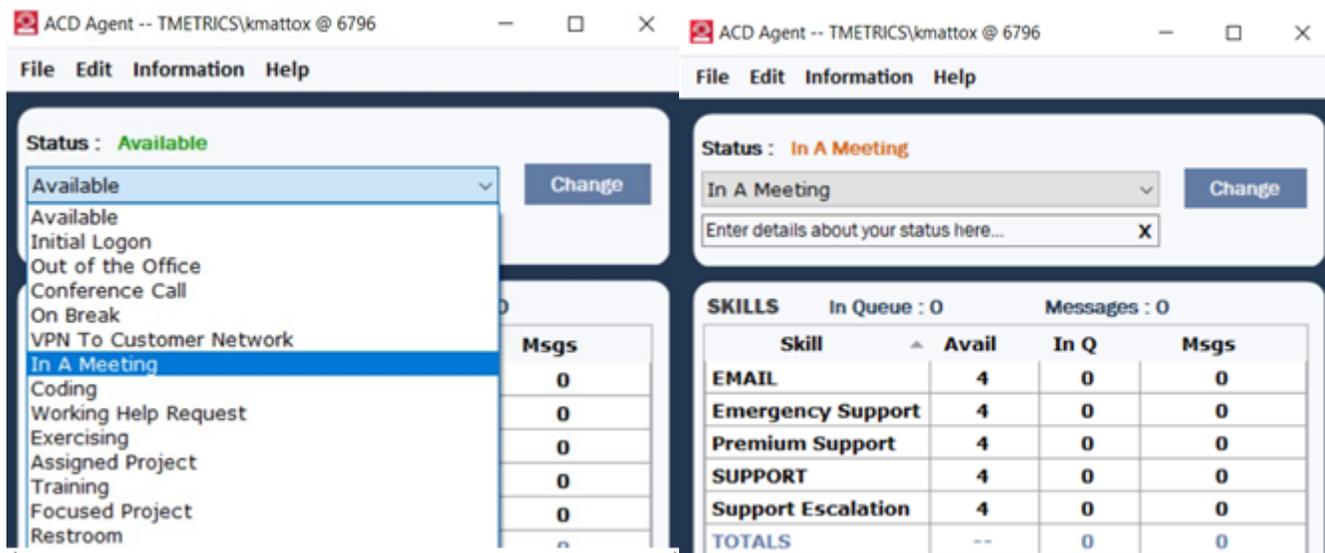
Users will not receive calls until they Log On and become **Available**.



STATUS CHANGES

The **Status** drop-down menu allows the selection of the **Status** item. Except for the required "**Logged Off**" and "**Available**" **Status** items, the rest of the settings are chosen by the Administrator(s) and stored in the ACD Controller database. Typical additional settings are "**Performing Post Duties**" and "**Out to Lunch**". These settings will make the Agent "unavailable" to take calls. An Agent can only receive an ACD call if he/she is in the "**Available**" **Status** and the phone is on hook (idle). Note: If an "**Available**" agent takes a call (off-hook state), the **Status** will change to a blue "**Available**" (see above section labeled "Color Coding").

To change the **Status**, place the mouse over the drop-down menu in the **Status Window** and click to show all existing **Status** options. Move the mouse pointer over the appropriate **Status** and click. The selected **Status** will then be the only one showing. Click on the **Change** button to complete the process.



CALLER ID WINDOW

This Window shows three pieces of data every time the agent has a call routed to them from the ACD. These data are **Caller ID, Hold Time, and Skillset**.

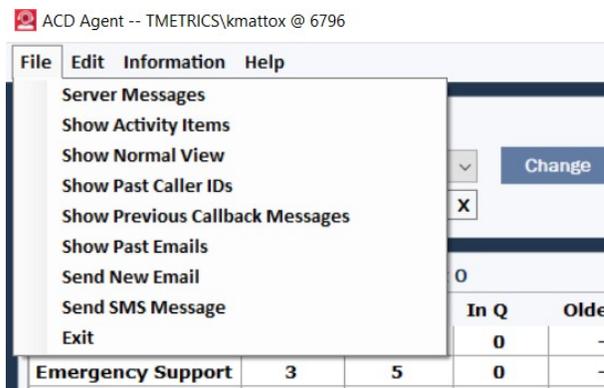
- **Caller ID** is the number that the caller is calling from. This may include the trunk number that the 10-Digit Number is a part of.
- **Hold Time** is the length of time for which the call has been in the system waiting for an answer from an agent.



- **Skillset** displays the Skill from which the caller needs assistance and thereby causes the ACD to route the caller to the agent. For instance, if an agent is a member of both Engineering and Support Skillsets, this indicator will display which of these two skills for which the caller is calling.

MENU BAR ITEMS

File



Server Messages:

This displays all messages between the server and the Agent client.

Show Activity Items:

This option allows the agent to view all the activity items that are tied to each of the skills with which the agent is associated.

Show Expanded / Show Normal View:

This toggles between the expanded and normal views of the AgentModule.

Show Past Caller IDs:

This option is used to view caller ID stamps from earlier in the day, as opposed to the one currently showing in the Caller ID window

Show Previous Callback Messages:

This function displays a window with a list of Customer Callbacks previously delivered to this agent position. The window will display the File Name, Caller ID, and Call Time of each Customer Callback. From this screen, a file can be selected and, by pressing the **Get File** button, downloaded to the local computer.

Show Callback Messages For All Agents:

This function displays a window with a list of all Customer Callbacks previously delivered to any agent currently logged into the ACD. The window will display the File Name, Caller ID, and Call Time of each Customer Callback.

From this screen, a file can be selected and, by pressing the **Get File** button, downloaded to the local computer.

Exit:

This is used to close the **ACD Agent Module** and log the Agent off the ACD system.

Edit

Agent Callbacks:

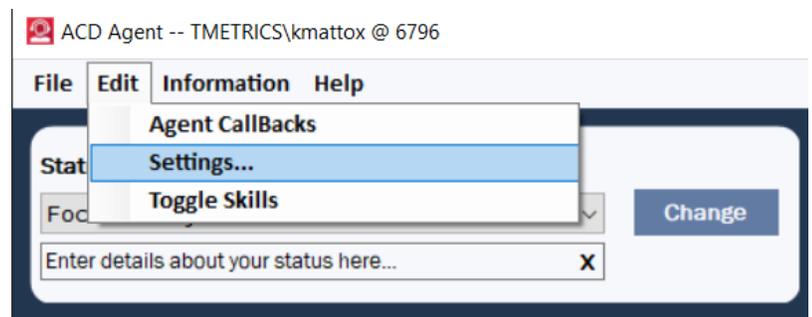
This brings up the Agent Callbacks window explained above.

Toggle Skills:

If an Agent has been given the ability to turn on and off Skills by a Supervisor, this feature will allow the Agent to perform those actions.

Toggle Skill Groups:

Allows user to turn a specific skill group on or off.



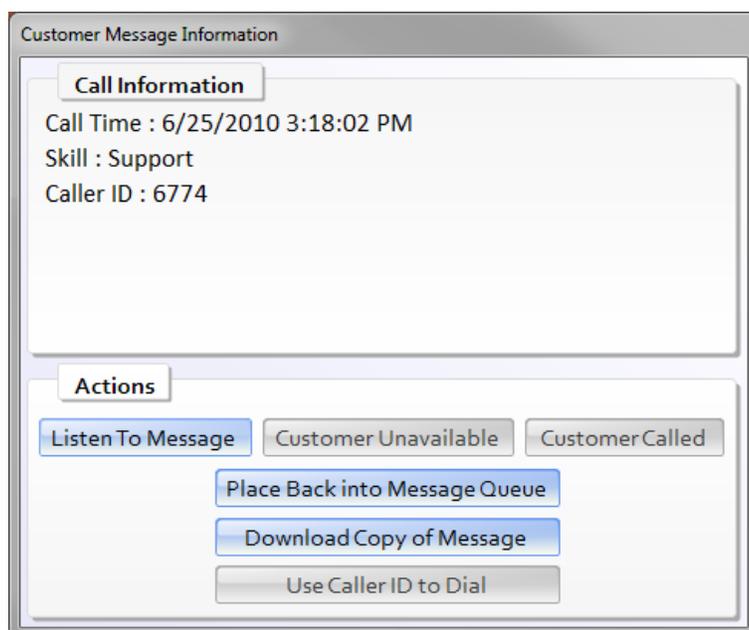
AGENT MANUAL - NON-CALL & ACD OBJECTS

Customer Callback Messages

Completing the Customer Message Information

This option is in place to allow an agent to retrieve Customer Messages (voice messages) left by a caller for a skill *manually* when the system is configured to withhold them until they are requested by an agent.

Conversely, the system can be configured so that callers can leave a Customer Message that will either be delivered to an **"Available"** Agent when there are no "live" calls to be presented, or delivered to an agent *as if it were a live call with its own place in queue* (depending on the way the system is configured). When a Customer Message is sent to an Agent, the Agent is presented with the **Customer Message Information** window shown below:



Customer Message Information Screen Pop

In order to listen to the Customer Message, the Agent will click on the **Listen To Msg** button. The Agent's desk phone (either a standard phone or a T-Metrics SoftPhone box) will then ring and the Agent will be instructed to "Press any key to play the message".

- For Agents using a standard phone set, press any key on the telephone keypad.
- For Agents using a T-Metrics Console, go to **Telephone Tools** on the menu bar, select **DTMF Send <CTRL+Alt>**, and then press any digit on the keyboard.

The Agent can press any key to play the message again.

Completing the Customer Message Information

When the message has finished playing, the Agent must select one of the other buttons on the **Customer Message Information** window to indicate the action taken in regards to the message:

- If the Agent reaches the caller and completes the message, the Agent presses the **Customer Called** button and the window will close. This will mark the call as "Cust Called" in the call records log for reporting purposes.
- If the Agent is unable to complete the message (e.g., leaves a message for the caller, etc.), the Agent presses the **Customer Unavailable** button and the window will close. This will mark the message as "Cust Unavailable" in the call records log for reporting purposes.

Closing the Customer Message Window without Call Resolution Selected

- If the Agent closes the **Customer Message Information** window by selecting the  in the upper right-hand corner, the message will be sent back to the Agent to retrieve again. If the Agent receives an incoming call, the message will be sent to the Agent when the position is **Available**. If the Agent makes his/her position unavailable (by selecting **On Break**, **Out to Lunch**, etc), the message will be routed to the next available Agent.

- If the Agent closes the **Customer Message Information** window by pressing the **Close with No Action** button, the message will be sent back to the Agent to retrieve again. If the Agent receives an incoming call, the message will be sent to the Agent when the position is "**Available**". If the Agent makes his/her position unavailable (by selecting "**On Break**", "**Out to Lunch**", etc), the message will be routed to the next available Agent.

The **Customer Message Information** window **should not** be closed by these methods as it creates reporting errors in the call reconciliation process.

