ANPI VIP Call Center
A Hosted Call Center Solution

User Guide
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Overview

For SMBs looking for call center functionality, look no further than ANPI VIP Call Center, a hosted call center solution. Seamlessly integrated into ANPI VIP Hosted Unified Communications, it provides a feature-rich application that lets businesses handle calls – and callers – easily, efficiently and professionally. The solution distributes and routes calls to the most appropriate agent, based on queue attributes. On-demand reporting and real-time monitoring allow supervisors to effectively manage agents and monitor key call center performance indicators.

The Call Center is easily managed through the ANPI VIP Customer Administration Portal at vip.anpi.com. Set up queues with a few clicks of the mouse. View thresholds in real time. View real-time or historical reporting. Call Center Agents can see all call-handling functions clearly displayed in their own web-based client. Call Center Supervisors have a web-based client, as well, allowing for simple management of queues and agents, call monitoring and the ability to prioritize or redirect calls.

ANPI Call Center User Types

The ANPI Hosted Call Center solution delivers on a rich-set of features based on an industry-proven platform. The solution offers a flexible and attractive licensing model that provides benefits to inbound call center environments across various verticals. There are three ANPI Call Center user types – an agent joining a call center using a phone, an agent joining a call center using the optional web client, and a supervisor using a web client to manage agents and queues.

1. **Call Center User License** – This is the foundational agent user license that gives an assigned user the ability to join a call center. A user (i.e., Agent) must be “joined” to a call center to receive calls from the call center. The Call Center User license is the default for all Agents. It is assigned to a user’s profile in the Administration and Access web interface.

2. **Agent Client License** – This is an optional license that is purchased separately, as an add-on to the Call Center User license. The Agent Client license gives an assigned user the ability to use the web-based Agent Client. It is assigned to a user’s profile in the Administration and Access web interface. The Agent Client lets Call Center Agents quickly identify and answer incoming calls, manage active calls and view their performance history.

3. **Supervisor Client License** – This is a license that does not require a Call Center User license. The Supervisor Client license gives an assigned user the ability to monitor Agent and queue activity in real time, manage active and queued calls, and run real-time and historical reports on Agent and queue performance. This license is required for a
Supervisor User type. It is assigned to a user’s profile in the Administration and Access web interface.

Call Center Set-Up

Add a User

Call Center users are not automatically assigned when the product is purchased. The Administrator or designated resource group (i.e., IT) will need to log into the Customer Administrator Portal at vip.anpi.com to assign users based on the purchased licenses. Using the Administration and Access Tab, users can be added as an end user. The Administrator is the same as the overall Customer Administration Portal Administrator. The end user role covers the Agent and Supervisor roles. This is the place in which the Agent User and Supervisor User licenses are assigned. The end user can also be an Administrator. The screen image below shows the location of the Administration and Access tab within the Customer Administration Portal.
1. Click the **Add User** option on the left side (bottom) of the Administration and Access Tab.

![Add User Option](image)

- **First Name**
- **Last Name**
- **Email Address**
- **Tags** - Labels used to define this user.
  - New Tag
- **Role** - Choose between admin or user rights for this user.

![User Information Form](image)

2. When the dialog box opens, enter the new user’s **First Name**, **Last Name** and **Email address**.

3. The **Tag** provides an option to label the type of user that is being created. For example, the created user can be tagged as an **Administrator**, **Agent** or **Supervisor**. Additional Tags can be created and appropriately named based on the needs of the business.

4. The **Role** should be selected based on the required privileges for the user being created. If the user being created is designated to be an Administrator, the **Admin role** should be selected. If the user being created is designated to be either an Agent or Supervisor, the **End User role** should be selected.

   Verify the selections and entered data, then, for a single user, select **Create User**.

   **Note:** All fields are required to be completed before the user can be created. After the system processes the request, it will indicate **User Successfully Created**.

5. If you know you are planning to create more than one user, select the **Create User and Add Another** button.
**Edit User**

1. When you select the Edit command from the Administration and Access tab, the below screen is displayed. This allows you to edit a previously-added user.

2. The fields that can be edited include **First Name**, **Last Name** and **Email Address**.

The extensions and phone numbers assigned to the user cannot be edited from this screen.

The Tags can also be edited, as applicable. The Call Center User settings will be described in greater detail later in this document.

The Role field is configurable when adding a user that is not the Admin or Administrator.
The above screen is where the licenses are assigned to the different user types. For example, if the user type is an Agent, Agent privileges must be assigned to the user. If the user requires Agent Client privileges, Agent Client privileges must be assigned.

**Note:** Agent Client privileges are optional.

3. When the command button is in the **On** position, licenses can be assigned to the **Call Center User Type**, **Agent Client** or **Supervisor Client**.

4. For **Agent Settings** and **Supervisor Settings**, the number to the left represents the total number of licenses available. The number to the right represents the license assigned for that user type.

5. **Agent Threshold Profile** can be assigned to the phone extension for the Agent user type based on available Agent Threshold Profiles available from a drop-down list.
**Viewing the Call Center**

The Call Center is managed in its own tab within the Customer Administration Portal. Within this tab, you can set up queues and monitor statistics. There are two sections: 1) Call Center for queue management, and 2) Call Center Statistics to view queue thresholds.

**Call Center Management**

The Call Center section within the Call Center tab will allow an assigned Supervisor to edit the settings for a queue.

1. Highlight the queue you want to edit and click the icon. The **Edit Queue – [Queue Name]** dialog box opens.

2. Click the tab to edit.
   - **Queue Profile:** Select call center (queue) and agent settings.
   - **Call Routing:** Configure handling of bounced calls, stranded calls and overflow calls.
   - **Users:** Assign available agents and supervisors.
   - **Announcements:** Select announced messages and music on hold.
   - **Thresholds:** Set yellow and red thresholds for queue metrics.

**Queue Profile**

Within Queue Profile, a Supervisor can edit the following queue and agent settings.

- **Time Zone:** Click the drop-down arrow and make a selection.
- **Call Distribution Type:** Click the drop-down arrow and select one of the following:
• **Circular** – Incoming calls hunt through agents in the order they appear on the list, starting with the agent who follows the agent who received the previous call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all agents.

• **Regular** – Incoming calls hunt through agents in the order they appear on the list, starting from the top.

• **Simultaneous** – Incoming calls alert all agents at the same time. The first agent to answer handles the call.

• **Uniform** – Incoming calls hunt through all agents, starting with the agent who has been idle the longest, and ending with the agent who most recently answered a call.

• **Weighted** – Incoming calls are assigned to idle agents based on percentages assigned to the agents in the queue’s profile. This feature supports an element of skills-based routing, since a higher percentage of calls can be routed to more highly skilled agents within the queue.

• **Phone Number**: Click the drop-down arrow and select a number.

  **Note**: Virtual numbers not assigned to any other service are listed here.

• **Extension number**: Edit the queue’s extension number.

• **Queue Length**: Click the drop-down arrow and select the number of active calls allowed in the queue.

• **Play ringing when offering call to**: Click to turn **On** or **Off**. Default is **Off**.

• **Allow caller to dial a set number to escape out of queue**: Click to turn **On** or **Off**. If you select **On**, click the drop-down arrow to select the phone number users will dial to escape.

• **Reset caller statistics upon entry to queue**: Click to turn **On** or **Off**. Selecting **On** resets the wait time of callers to 0 when they are transferred to a different queue.

• **Distinctive Ringing Pattern for Queue Calls**: Click to turn **On** or **Off**. If you select **On**, click the drop-down arrow and select a ringing pattern.

• **Allow agents to join Queue**: Click to turn **On** or **Off**. If you select **On**, agents have the ability to explicitly join a queue. If set to **Off**, they are “Joined In” by default.

• **Allow call waiting on agents**: Click to turn **On** or **Off**.

  **Note**: If you have a high-volume call center, set this value to **On**.

• **Enable calls to agents in wrap-up state**: Click to turn **On** or **Off**.

  **Note**: If you select **On**, agents will receive calls while in wrap-up state, no matter how much Maximum ACD wrap-up time you set (see setting below).

• **Automatically set agent state to set value after call**: Click to turn **On** or **Off**. If you select **On**, click the drop-down arrow and select a state:
  - Available
  - Unavailable
  - Wrap-up

• **Maximum ACD wrap-up time**: Click to turn **On** or **Off**. If you select **On**, click the drop-down arrows and select the number of minutes and seconds. This will set the maximum time an agent assigned to this queue can be in the wrap-up state. Wrap-up state provides time for an agent to perform post-call activities before being available for the next call.

• **Click Save Queue Profile**. A message appears confirming that you successfully updated the profile.
**Call Routing**

Within Call Routing, call routing policies can be configured using the bounced call settings, overflow call settings or stranded call settings.

**Bounced calls:** Calls that are routed to an agent, but for some reason (agent does not answer the call, they change to unavailable, their device is not registered, etc.), the call is not answered. A bounced call is treated with the highest importance and, when it is returned to the queue, is placed ahead of the rest of the non-bounced calls.

**Overflow calls:** Overflow occurs (1) when an incoming call cannot be queued because the queue has reached its configured maximum capacity, or (2) when a queued call is not handled (either by an agent or by another queue policy) within a specified amount of time.

**Stranded calls:** Calls in a queue that has no staffing agents (an agent is said to be staffing a queue if the agent has joined the queue and is not in the Sign-out state), or a call in a staffed queue where all agents are currently unavailable.

**Bounced Call Settings**
Select the conditions under which a call is considered “bounced.”

1. **After a set number of rings:** Set the button to On and enter the number of rings.
2. **If agent becomes unavailable while routing the call:** Set the button to On.
3. **After being held by agents for longer than the set time:** Set the button to On and enter the time in seconds.

4. Click **Save Call Routing**. A message appears confirming that you successfully updated the call routing.

**Overflow Call Settings**
Select which actions are taken when calls overflow.

1. Choose one of the following actions:
   - Perform busy treatment
   - Transfer to phone number (if selected, you must also enter a phone number)
   - Play ringing until the caller hangs up
2. **Play announcement before overflow processing**: Set to **On** or **Off**, as desired.

   **Note**: If **On**, the default announcement will play unless you select a custom audio file. See step 4 below.

3. **Overflow after a call waits a set amount of time**: Set to **On** or **Off**, as desired. If **On**, enter the amount of time in seconds.

4. (optional) If you want to select a custom audio file for the announcement played before overflow processing:
   a. Set **Custom audio file** to **On**, then click **Browse**.
   b. To select a previously uploaded file, highlight it in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
   c. To upload a new audio file, click **Upload New Audio File** and select a .wav file from your computer. Highlight the file in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
   d. Click **Use This Audio**.
   e. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

5. Click **Save Call Routing**. A message appears confirming that you successfully updated the call routing.

**Stranded Call Settings**
Select the call routing for stranded calls under two scenarios: (1) when all agents are signed out, or (2) when all agents are unavailable and another triggering condition applies.

**All Agents Are Signed Out**:
1. Choose one of the following:
   - **Perform busy treatment**
   - **Transfer to phone number** (if selected, you must also enter a phone number)
   - **Leave in queue**
2. Click **Save Call Routing**. A message appears confirming that you successfully updated the call routing.

**All Agents Are Unavailable And**

This call routing is performed when all agents are unavailable, and at least [1..no of agents in queue] agents have unavailable code [select from existing unavailable codes].

When this option is enabled and the triggering condition is not enabled, calls are not considered stranded, and this call routing is not applied. If unavailable codes are not provisioned for the call center, this option is ignored.

1. **At least [ X] agents have a set unavailable code**: Enter the number of agents, set the button to **On**, and click the drop-down arrow to select the unavailable code that will trigger the call handling in step 2 below.

2. Choose one of the following:
   a. **Perform busy treatment**
   b. **Transfer to phone number** (if selected, you must also enter a phone number)
   c. **Leave in queue**

3. Click **Save Call Routing**. A message appears confirming that you successfully updated the call routing.

**Users**

Within Users, available agents and supervisors can be assigned to the queue. Also search and reorder the lists of agents and supervisors.

**Assign Agents**

1. Highlight the agent you want to assign in the **Available Agents** list.

   **Note:** You can scroll or begin typing the agent’s name in the search box.
2. Click the > button to move the agent to the **Assigned Agents** list.

3. To move an agent up or down in the list, click the ^ and v buttons.
4. To remove an assigned agent, select the agent and click the < button.
5. Click **Save Assigned Users**. A message appears that you successfully updated assigned users.

**Assign Supervisors**

1. Highlight the supervisor to assign in the **Available Supervisors** list.

   **Note:** You can scroll or begin typing the supervisor’s name in the search box.

2. Click the > button to move the supervisor to the **Assigned Supervisors** list.

3. To move a supervisor up or down in the list, click the ^ and v buttons.
4. To remove an assigned supervisor, select the supervisor and click the < button.
5. Click **Save Assigned Users**. A message appears that you successfully updated assigned users.
Announcements

Within Announcement, enable and select the messages and music on hold that callers hear while in queue. Alternative audio for internal calls can also be selected.

- **Entrance message**: This is the first message played when there are no agents available to accept the call or when agents are available and the **Play ringing when offering call** option is not enabled.
- **Mandatory Entrance message**: When you select this option, the entire Entrance message is played to each inbound caller. During playback, callers cannot escape and supervisors cannot manipulate the call.
- **Estimated Wait Message**: When a new call is added to the call queue, this message is played after the Entrance message and before any other announcements. Callers are informed of their Queue Position or their Estimated Waiting Time. You can select the interval at which this message is played.
- **High Volume Message**: An announcement that there is an unusually high volume of calls so wait times are longer than usual.
- **Default Handling Time**: The estimated handling time per call, which is used to calculate the expected wait time. The announced expected wait time is the default handling time multiplied by the number of calls in queue.
- **Comfort and Music on Hold messages**: These messages are played in a loop at selected intervals until the call is answered.

**Entrance message**

1. Set **Entrance Message** to **On**.
2. If you want to make the Entrance Message mandatory, set **Message is mandatory when played** to **On**.
3. (optional) Set **Custom audio file** to **On** and then click **Browse**.

   **Note**: If you do not select a custom audio file, the default system message plays.

4. To select a previously uploaded file, highlight it in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
5. To upload a new audio file, click **Upload New Audio File** and select a .wav file from your computer. Highlight the file in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.

6. Click **Use This Audio**.

7. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

**Music on Hold**

1. Set **Music on Hold** to **On**.

2. (optional) Set **Custom audio file** to **On**, then click **Browse**.

   **Note**: If you do not select a custom audio file, default music plays.

3. To select a previously uploaded file, highlight it in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
4. To upload a new audio file, click **Upload New Audio File** and select a .wav file from your computer. Highlight the file in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
5. Click **Use This Audio**.
6. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

**Alternate Audio for Internal Calls**

1. Set **Use alternate audio for internal calls** to **On**.

2. (optional) Set **Custom audio file** to **On**, then click **Browse**.

   **Note**: If you do not select a custom audio file, the default system message plays.

3. To select a previously uploaded file, highlight it in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
4. To upload a new audio file, click **Upload New Audio File** and select a .wav file from your computer. Highlight the file in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.
5. Click **Use This Audio**.
6. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

**Estimated Wait Messages**
1. Set **Estimated Wait Messages** to **On**.
2. Set **Message Interval** to **On** and enter the number of seconds between message announcements.
3. Click the **Message Type** drop-down arrow and select either **Announce Wait Time** or **Announce Queue Position**.

4. Set **High volume message** to **On** or **Off**, as desired.
5. Enter the **Default handling time** in minutes.
6. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

**Comfort Message**
1. Set **Comfort Message** to **On**.
2. Enter the **Message Interval** in seconds.
3. (optional) Set **Custom audio file** to **On**, then click **Browse**.

**Note:** If you do not select a custom audio file, the default system message plays.

4. To select a previously uploaded file, highlight it in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.

5. To upload a new audio file, click **Upload New Audio File** and select a .wav file from your computer. Highlight the file in the **Uploaded Audio Files** list and click the > button to move it to **Assigned Audio Files**.

6. Click **Use This Audio**.

7. Click **Save Announcement**. A message appears confirming that you successfully updated the announcement.

**Thresholds**

Within Thresholds, set “Yellow” and “Red” threshold values for the following call center metrics:

- Current calls in queue
- Current longest waiting call
- Estimated wait time
- Average handling time
- Average speed of answer

When these thresholds are crossed, the severity is rendered visually on the Supervisor’s Dashboard. Email notifications can also be sent to the addresses entered on this tab.
Note: Agent Threshold Profiles are set up in Call Center Settings and selected in Administration and Access > Edit User Settings.

1. Set the Threshold button to On.
2. Enter a number for Current Calls in Queue in the Yellow Thresholds and Red Thresholds columns. Once the number of calls in queue exceeds the number you entered, supervisors will see a visual representation on their Dashboards. Optional email notifications can also be sent.
3. Click the drop-down arrows and select the Yellow and Red Thresholds (in hours, minutes and/or seconds) for Current Longest Waiting Call, Estimated Wait Time, Average Handling Time and Average Speed of Answer.

4. (optional) To also send email notifications when your selected thresholds are crossed:
   a. Set the Email Notification button to On.
   b. Enter up to 6 email addresses.

5. Click Save Thresholds. A message appears confirming that the update was successful.

Call Center Statistics
Call Center Supervisors can view queue and agent statistics over a selected period of time within this section.

Note: Only queues assigned to a specific Supervisor can be viewed.
a) Click the icon next to the queue whose statistics you want to view. An expanded view opens. At the top left, the widget indicates the time frame for the statistics displayed below.

![Call Center Statistics](image)

b) To change the time frame:
   a. Click **Change Time frame** at the top right.

![Change Time frame dialog box](image)

   b. The **Change Time frame** dialog box opens.

   c. Set **Real-Time Statistics** to **Off**. The system automatically switches **Specified Time frame** to **On**, and vice versa.

   d. Click the icons and select a **Start Time** and **End Time**.

   **Note:** If you choose **Real-Time Statistics**, you only need to select a **Start Time**.

   e. Click **Update Time frame**.

c) View the following queue statistics:
   - Number of busy overflows
   - Number of calls answered
   - Number of calls abandoned
   - Number of calls transferred
   - Average number of agents talking
   - Average number of agents staffed
   - Average wait – seconds
• Average abandonment – seconds

d) View the following agent statistics:
• Agent name and phone number
• Calls handled
• Calls unanswered
• Average call time
• Total talk time
• Total staffed time

Agent and Supervisor Clients
The Call Center Agent and Supervisor clients are web-based and can be accessed anywhere there is a secure Internet connection that supports Secure Socket Layer (SSL), as shown in the URL below.

Login to Clients
For the Web-Based Supervisor Client and Agent Client, https://client.anpi.com/callcenter is provided based on the licenses granted. A username and password is required to access to either the Supervisor Client or Agent Client. The username and password should be the same as the user’s VIPresence login credentials.

a) For VIProfessional or VIPremier customers, the username and password are the same as the VIPresence login credentials.

b) For VIPrecision users, please contact the company administrator for the username and password.

c) For those customers who have synchronized (sync) their password using the sync password functionality, users will have to use the password they have changed to as a result of the password synchronization.

d) To sign into the Call Center, enter the URL (client1602.anpi.com/callcenter) for the Supervisor Client or Agent Client. The Call Center sign-in page appears as indicated below:
**Supervisor Client**

A Call Center Supervisor can view queue and agent statistics over a selected period of time. The Supervisor Client is used by the Supervisor to more effectively manage his or her assigned agents and queues. The screen capture below (of the Supervisor Client) will be used to describe both the capabilities available to Agents and Supervisors through the web-based interface.

1. **Logo Pane** – The Logo Pane displays information about the Supervisor and contains links to other pages and functions.
2. **Call Console** – Supervisors use the Call Console to view and manage their current calls.
3. **Contacts Pane** – For Supervisors, the Contacts Pane contains their contact directories and provides the them with real-time call and ACD state of the agents they are monitoring.
4. **Queued Call Pane** – Supervisor uses Queued Call Pane to manage queued calls.
5. **Dashboard Pane** – For the Supervisor, the Dashboard Pane provides real-time summary information for up to 50 queues and allows the Supervisor to monitor key performance indicators for monitored call centers and supervised agents.
6. **Call History Dialog Box** – Supervisors can use the Call History Dialog Box to view past calls and make calls from history.
7. **Chat Windows** – Supervisors can use the Chat Windows to chat with their IM&P contacts.
9. **Settings Pages** – Supervisors can use the Settings Pages, accessed via the Settings link, to configure various aspects of the Call Center.
Agent Client

A Call Center Agent can more effectively facilitate and address customer calls by using the Agent Client. Designed to support agents in any environment, the Agent Client provides real-time displays that help with answering, initiating or managing calls.

1. **Logo Pane** – The Logo Pane displays information about the agent and contains links to other pages and functions.
2. **Call Console** – Agents use the Call Console to view and manage their current calls.
3. **Contacts Pane** – For the agents, the Contacts Pane contains their contact directories, the list of their supervisors and the list of call centers to which they belong.
4. **Dashboard Pane** – For the agent, the Dashboard Pane provides real-time summary information for up to 50 call centers selected from the list of call centers to which the agents are assigned.
5. **Call History Dialog Box** – Agents can use the Call History Dialog Box to view past calls and make calls from history.
6. **Chat Windows** – Agents can use the Chat Windows to chat with their IM&P contacts.
7. **Report Window** – For the Agents, they can use the Report Window, accessed via the Reporting link, to generate reports about their activity and performance in the call centers they are staffing.
8. **Settings Pages** – Agents can use the Settings Pages, accessed via the Settings link, to configure various aspects of the Call Center.

Agent State Management

**Agent Call Center Access using Polycom® Phones**

Agents can also join the call center using a supported Polycom phone. The call center application is designed to present calls to an available agent from a list of agents. The agent’s availability is based on a combination of whether they are joined to the call center, their ACD state and their line state – off-hook, on-hook, Do Not Disturb or ringing – in that particular order.
The most fundamental agent state is the Join/Unjoin state. An agent must be “Joined” to a call center to receive calls from the call center. Agents can join the call center using the Agent Client, or they can join a call center using the soft keys on a supported Polycom® phone.

Agent ACD states:

- Available – Indicates the agent is available to accept new calls or is on an active call
- Unavailable and unavailable sub codes – indicates the agent is not available to accept new calls
- Wrap-up – Indicates the agent is performing post-call work, such as paperwork (when in this state, agents may or may not be available to accept calls)
- Sign-in/Sign-out – Indicates whether the agent is “in the office” (present) or “out of the office.” (has left for the day)

The following commands demonstrate how to sign in or sign out using a supported Polycom phone.

After ACD is enabled on your phone, an ASignIn/ASignOut soft key displays on the phone's idle screen.

1. Press the ASignIn soft key to sign in and start receiving calls.
2. After you sign in as an agent, your status is set to Available and incoming calls are directed to your ACD line.
3. When your status is set to Available, the ASignOut soft key displays.
4. Press this key to sign out.
5. You can change your agent state – sign in, sign out and wrap up – using soft keys or through the phone menus.

To sign in using the phone menu:

1. Press or tap Menu > Features > ACD > ACD SignIn/SignOut.
2. Scroll to Agent SignIn and press or tap the Select soft key.

To sign out using soft keys:

1. Press or tap the ASignUp soft key.

To sign out using the phone menu:

1. Press or tap Menu > Features > ACD > ACD SignIn/SignOut.
2. Scroll to Agent SignOut and press or tap the Select soft key.