



TDS® *managedIP* Hosted

Call Center Polycom Soft Key User Guide

Using the *managedIP* Call Center Polycom Soft Keys

This guide is intended for *managedIP* call center agents and call center supervisors using Polycom telephones. It describes the functions and operation of the phone, relative to call center use.

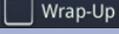
When a User subscribes to the Call Center feature (Agent or Supervisor), the phone will provide the call center agent state and status. The phone also provides the call center agent or supervisor with a simple method to Sign In/Sign Out of their call center(s) and to update certain call center states using the telephone soft keys.

Changes to the phone state, however, will only take place once the *managedIP* platform has acknowledged that the phone can move into that new state. This way, the Call Center state is maintained in synchronization with the *managedIP* call center platform and the call center desktop software.

Topics in this guide include:

- Setting the Initial Agent State
- Signing In and Out as an Agent

Customers with Premium Call Center Agent or Premium Call Center Agent Plus service will see their current state appear in the row of soft keys at bottom.

Agent States	Line Icons
Sign Out	
Sign In, Available	
Sign In, Unavailable	
Wrap-up	

Setting the Initial Agent State

Each time an agent signs in to the call center from their phone, the initial agent state is set to the configured initial value. By default, this value is Available.



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To set or change the initial agent state:

- Press **Home Key**.
- Select **Settings**.
- Select **Features > ACD... > Initial ACD State**.

The screenshot shows a menu titled "Initial ACD State" with a "Back" button. There are two options listed: "1 Available" with a checked checkbox and "2 Unavailable" with an unchecked checkbox.

- Select Desired State.

At the next sign in, the initial agent state will be the value selected.

Signing In and Out as an Agent

Sign in (sign out) through the use of soft keys or the menu.

To sign in using Settings Menu:

- Press **Home Key**.
- Select **Settings**.
- Select **Features > ACD... > ACD SignIn/SignOut**.

To sign in using soft keys:

- Select Agent SignIn or Agent SignOut

The screenshot shows a menu titled "ACD SignIn/SignOut" with a "Back" button. There are two options listed: "1 Agent SignIn" with an unchecked checkbox and "2 Agent SignOut" with a checked checkbox.

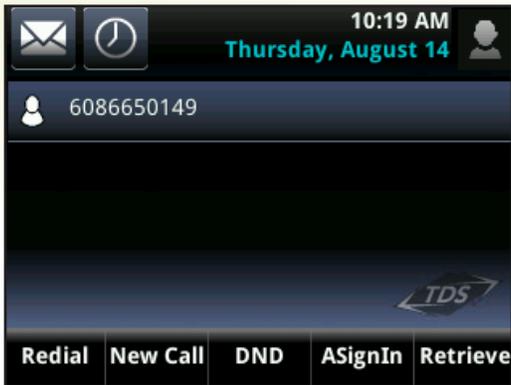


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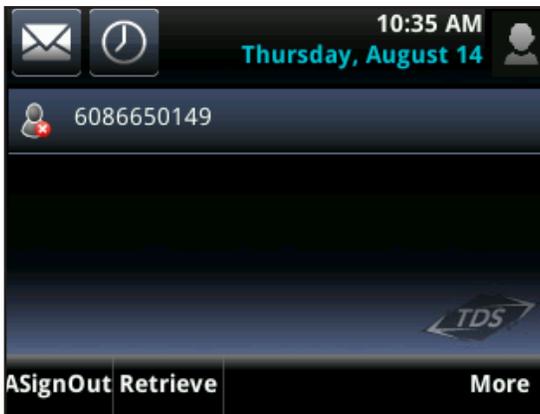
To sign in/sign out using soft keys

- Select the **ASignIn**



To sign out using soft keys:

- Select **More**
- Press the **ASignOut** soft key.





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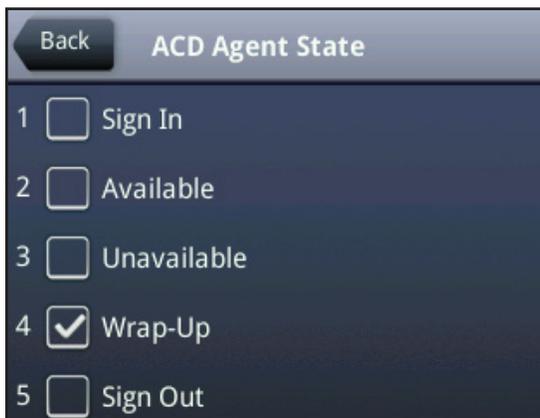
Changing the Agent State

Change the agent state through the use of soft keys or the menu. If agents are configured with Wrap-Up, at the end of each call, the *managedIP* system will automatically put the phone into a “Wrap-up” state. The agent may leave this state early if they are ready for more calls by pressing the **Avail.** soft key.

The agent is unable to select the wrap-up state via use of the soft keys; however, is able to do so through the menu. Wrap-Up effectively makes the agent unavailable for calls for a configured period of time while post-call work is done. When manually changing the state to “Wrap-Up” from the phone menu, the agent is forced to manually change the state to “Available” to begin receiving calls (i.e., the state will not automatically change as it does after a call).

Press Home Key

- Press **Home Key**
- Select **Settings**
- Select **Features > ACD > ACD Agent State >**
- Select **State**



Changing the call center state may also be done through the web client if the agent has Call Center Agent Plus Licensing or Call Center Supervisor web-based soft-client. The phone state will stay in synchronization with the client if the state is altered through either device.

Note: If you change the agent state to Unavailable while your phone is ringing, you may do one of the following to ignore the call and silence the ringing:

- Press the **Reject** soft key
- Press the **DND** key (or select Do Not Disturb from the Feature menu)
- Wait for the ringing to stop

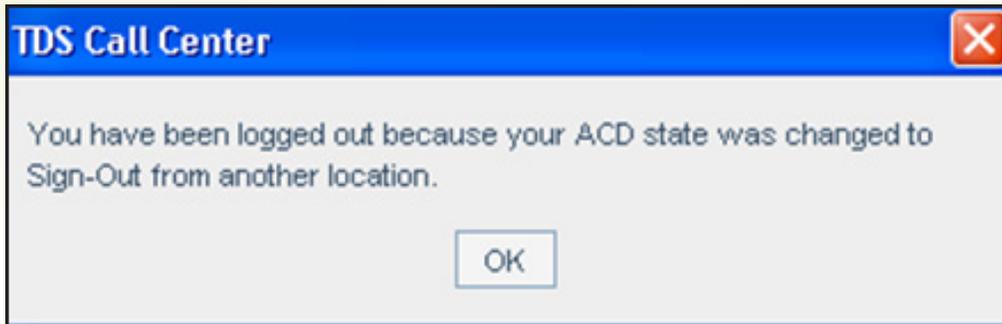
In all cases, the call will be returned to the queue for the next available agent.



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When an Agent or Supervisor signs out of the call center via the phone, the client (if in use) will automatically log out of the user's desktop, and the message below will appear:



Note: Signing in to a call center via the phone soft key will not cause the desktop client to automatically sign in. Agents/Supervisors using the client must manually sign in to the client on their desktop or add the application to the workstation's Windows Startup Group, enabling it to auto-launch each time a user logs in to the workstation.

Additional Support

- Contact the *managed*IP Administrator at your company or
- Visit support.tdsmanagedip.com/hosted for additional resources