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TOSHIBA

Telecommunication Systems Division

Strata® DK

Digital Business Telephone Systems

ACD Agent Guide

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Introduction

This guide is designed to provide instructions for the ACD Agent regarding the use of Automatic Call Distribution (ACD) on Toshiba's Strata DK system. It provides step-by-step instructions on how to use the ACD Agent buttons on the Agent station.

For instructions on using the non-ACD features of your telephone, refer to the appropriate Quick Reference Guide or User Guide (see "Related Documents" on Page v).

This guide does not provide instructions for the ACD Supervisor features. See the *Strata DK ACD Supervisor Guide* for information on Supervisor telephone procedures.

Organization

This user guide is divided as follows:

- **Chapter 1 – The Grand Tour** describes each available ACD Agent feature button.
- **Chapter 2 – Features** provides a description and step-by-step operational procedure for each individual ACD Agent feature.
- **Appendix – Access Codes** provides instructions for programming a sequence of steps or access codes onto feature buttons.

Conventions

The left column gives you single or numbered steps that you need to perform a procedure.	The right column gives the immediate response to your action. This column also includes additional notes and comments.

Note Elaborates specific items or references other information. Within some tables, General Notes apply to the entire table and numbered Notes apply to specific items.

Important! *Calls attention to important instructions or information.*

➤ Letters in [brackets] represent buttons which have Directory Numbers on them. For example:

[PDN]	represents a Primary Directory Number (also known as an Extension Number for your telephone.
[PhDN]	represents a Phantom Directory Number button (an additional Directory Number).
[DN]	represents a Directory Number button (also known as an Extension or Intercom Number). Whenever [DN] is used in this guide, it means the user can use any [PDN], [SDN], or [PhDN].
	represents buttons on a telephone.
~	means “through”
+	is used for multiple key entries.
➤	denotes the step in a one-step procedure.

Related Documents

The following user guides can be referenced for additional information:

- *Strata DK424 Call Center Solutions General Description*
- *Strata DK ACD Supervisor Guide*
- *Strata DK Digital Telephone User Guide*
- *Strata DK Digital Telephone Quick Reference Guide*
- *Strata DK Electronic Telephone User Guide*
- *Strata DK Electronic Telephone Quick Reference Guide*
- *Strata DK Standard Telephone User Guide*

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The Grand Tour 1

Automatic Call Distribution (ACD) for Toshiba Strata DK systems provides a quick, efficient means of handling a large volume of incoming calls. The calls can be automatically connected to ACD Agent Groups, bypassing an attendant. Calls are served in order of arrival and are automatically distributed among the Agents. The ACD features also provide announcements to incoming calls when no Agent positions are available.

ACD Group Agent

An Agent in an ACD Group can use a Toshiba proprietary digital, electronic, or standard telephone that is alson a tone or rotary-type telephone. An Agent station can be equipped with or without feature buttons or an LCD. Toshiba telephones have feature buttons that access the special ACD features.

The Strata DK digital telephone with an LCD and typical ACD Agent feature buttons is shown in Figure 1 on Page 2 on the following 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.

If your telephone does not have the ACD Agent feature buttons shown, you can enter access codes to perform the same functions (see “Access Codes” on Page 21).

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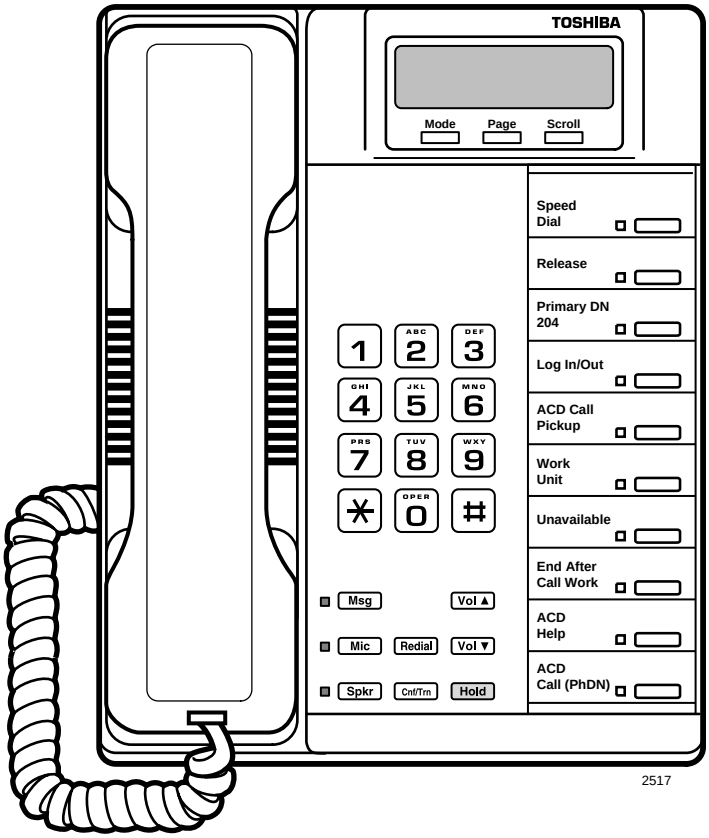

Figure 1 Sample ACD Agent Telephone with ACD Feature Buttons

Buttons

There are two sets of buttons: flexible and fixed. The flexible buttons consist of Directory Number (Primary and Phantom) and feature buttons. The number of pre-programmed flexible buttons varies by telephone. The fixed buttons (e.g., , , , , , ▲, and ▼) are standard to every 2000-series digital telephone (see Figure 1 on Page 2).

Fixed Buttons

The fixed buttons are located on your dial pad and enable you to perform standard functions quickly and easily (see Table 1).

Table 1 Fixed Button Definitions

Button	Definition
(Conference/Transfer)	Sets up conference and transfer calls.
	Holds internal or outside calls. The Line LED flashes green at the internal hold rate.
(Microphone)	Toggles the microphone ON/OFF while the telephone is in use. The LED indicates the status of the microphone.
(Message)	Calls back the station or voice mail device that activated the LED.
	Dials the number you originally called (use the same [DN] or that you used to dial the original number).
(Speaker)	Toggles the speaker ON/OFF. The LED indicates the status of the speaker.
▲ ▼	Adjusts volume levels.

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 your telephone keystrip, see your System Administrator. Table 2 describes each ACD button.

Table 2 Flexible Button Definitions

Button	Definitions
	Enables an agent to receive ACD calls, make/receive PBX calls, and Log In/ Out of the ACD Group. After an agent has logged out, the button can be used to make/receive non-ACD and non-PBX calls.
	Places a ACD call on hold and automatically rings the Supervisor.
	Enables an Agent to pick up ACD calls ringing at any Agent's telephone in the same group. Calls remain registered as an ACD call after being picked up.
	Ends After Call Work Time (system programming feature) and the Agent's telephone becomes available to take ACD calls.
	Logs an Agent in and out of the ACD Group and is used with the button.
	Releases calls from the Agent telephone.
	Stops ACD calls from ringing the Agent telephone temporarily.
	Enables an Agent to call a telephone number using a brief access code.
	Transfers CO Line calls (non-ACD or ACD) to an ACD Group.[1]
	Assigns a tracking code to an ACD call.

[1] Can be programmed onto an button for one-touch access (see Appendix – Access Codes on Page 21 for instructions).

Soft Keys

If you have a Strata 2000-series LCD digital telephone, the Soft Key features are deactivated while you are logged in as an ACD Agent. Only ACD displays are functional during ACD telephone sessions. When you log off from the ACD Group, Soft Key features become available again. Refer to the *Strata Digital Telephone User Guide* for more information on Soft Keys.

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Features 2

This chapter lists all the ACD features applicable to an Agent's station in alphabetical order beginning on Page 12. These features can be performed on digital or electronic telephones with or without LCDs.

- ACD Call
- ACD Call Pickup
- ACD Help
- Auto Answer with Zip Tone
- End After Call Work Time
- Log In/Out
- Log Out/Unavailable Pending
- Transfer to ACD Group
- Unavailable
- Work Unit

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Feature Interaction

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

- Call Forwarding – All types of Call Forwarding from [PDNs] and [PhDNs] are allowed. ACD calls do not forward, but PBX and non-ACD calls do forward in the normal manner.
- Message and Display – Soft Key labels and LCD messages unrelated to ACD do not display at your station. All other types of messages do display.
- Station Do Not Disturb – 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 the [DN].
- Executive Override – If you are talking on an ACD or PBX call, executive override of ACD/PBX calls is not allowed, but the Supervisor can call your [PDN] or an idle [PhDN].

Quick Reference

The following pages are a quick reference for using your telephone's ACD features.

Agent Calls

The types of calls handled by Agents are described in Table 3.

Table 3 Types of ACD Agent Calls

Type of Call	Description
ACD	External call that is routed and/or transferred to an ACD Group and rings on your button.[1]
PBX	External or internal call that is routed and/or transferred directly to your button directory number [PhDN]; or a call made from the button. You cannot receive ACD calls when you are on a PBX call.[1]
Non-ACD	Any call received or made from a [DN] or CO button that is not your button. The calls are not registered on MIS reports. You continue to receive ACD calls if you are logged into the ACD group.

[1] Registered on MIS reports.

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Agent Telephone Status

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

- 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 press or do not respond to two successive ACD calls. For more information, see "Unavailable" on Page 19. Your telephone can still receive and make non-ACD or PBX calls when it is in the unavailable status.
- After Call – When you disconnect from an ACD call you are automatically allowed an amount of time to do your paperwork. You can receive non-ACD or PBX calls if your telephone has been programmed to receive these calls. For more information on the procedure to end After Call, see "End After Call Work" on Page 16.
- Talk – When you are talking on an ACD call or have one on hold, you can receive non-ACD calls on other [DNs] or CO Lines.
- Log Out – You are logged out of the ACD Group. You can still receive and make non-ACD calls.
- PBX Call – When you are talking on a PBX call or have one on hold, you can receive non-ACD calls.

Placing Calls on Hold

You can place your current call on hold, whether it is an ACD or PBX call, and return to it later. To establish a three-way call with your Supervisor and your ACD caller, see "ACD Call Pickup" on Page 14.

➤ **To place an ACD call on Hold**

➤ Press .	The ACD Call LED flashes at the I-Hold rate and your LCD displays the message on the right.	HOLD LINE 5 JUL 27 TUE 02 : 27

Note Incoming ACD or PBX calls are not routed to , because it has a call on Hold and PBX calls are blocked.

➤ **To retrieve an ACD call on Hold**

➤ Press .

The call is retrieved and your LCD displays the message on the right.

```
QUE#000 AGT GP01
USING LINE 3
```

Note Incoming ACD calls are not routed to , because it has a call on Hold and PBX calls are blocked.

Logging In/Out

You log in and out of an ACD Group by using and . By entering a valid ACD Agent ID, your telephone becomes available for incoming ACD calls, and the ACD feature buttons and codes are activated. Every Agent ID code is unique and is always associated with a particular ACD group, unless the ID is re-assigned to another group in system programming.

Any Toshiba telephone can be used to log into an ACD Group providing that the telephone has a unique, single-appearing [PhDN] button. The [PhDN] that is used to log into an ACD Group becomes the telephone's . You can only be logged into one ACD Group at a time. Your telephone must be assigned as the owner of the [PhDN] button in system programming.

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 button to make and receive non-ACD calls after logging out. These kinds of calls are not registered as ACD or PBX calls for MIS reporting purposes.

When all of the Agents in a group log out, the shift ends for that group, and calls are routed to the after-shift destination. The new calls are automatically sent to the after-shift destination, which can be a voice mailbox, another ACD Group, or an announcement.

Important! *When the Supervisor ends the shift, all Agents must be logged out before the next (new) shift can start. The next shift starts once an Agent logs in.*

only works from the idle state, a non-ACD or PBX call hold, or After Call Work mode. Your action is ignored if you press the button while the station is in any other status.

ACD does not allow you to log out if you are the last active agent in the ACD Group, and there are calls waiting in the queue. These calls must be cleared before you can log out. Once all calls in the queue are cleared, the Log In/Out LED turns off and your telephone is logged out of the ACD Group (see "Transferring Calls to an ACD Group" on Page 18).

➤ **To log in**

1. Press +	The ACD Call LED is steady green, but the Log In/Out LED flashes red.	
...or +		
...or, from a standard telephone, go off hook and press , then go back on hook.	You are prompted to enter your ID code by the LCD display and a short burst of dial tone.	NO. 203 ENTER ID CODE
2. Enter your four-digit Agent ID code.	A one-second burst of dial tone confirms successful log in. The Log In/Out LED turns steady red. **QUE #000** = Number of calls in queue **XX** =ACD Group number (01~16).	QUE# 000 AGT GPXX JUN 16 WED 02:27

	If the Agent ID code is invalid, a fast busy tone is heard. The Log In/Out LED stops flashing and turns off. The LCD displays the message on the right. Repeat Step 2. If you continue to get the error message, contact your Supervisor.	NO. 203 LOG IN ERROR

➤ **To cancel log in**

➤ Press at any time.

➤ **To log out**

➤ Press ...or + , then (or hang up ...or, from a standard telephone, go off hook and press , then go back on hook.	The Log In/Out LED turns off and the Agent is logged out of the ACD Group. **Note** If the Log In/Out LED flashes, there are calls remaining in queue and you are the only Agent logged in (see "To Log out when you are the last active agent" on Page 11.

Log Out (Pending)

This feature enables you to end the ACD shift if your telephone is the only one logged in to the ACD Group, and your Supervisor has not ended the shift. Log Out (Pending) or Unavailable (see "Unavailable" on Page 19) prevents new calls from entering the ACD queue and redirects the calls to the after-shift destination or the overflow-point destination as assigned in the system programming.

For example, if it is time for your ACD shift to end, but calls are continuing to arrive into the ACD queue, use the Log Out Pending or Unavailable feature so that you can eventually log out.

➤ **To use log out (pending)**

➤ Press .	The Log /InOut LED flashes and the status changes to the Log Out Pending mode. When the last call is cleared from the queue, your status changes to logged out.

➤ **To log out when you are the last active agent**

➤ Press ...or + , then (or hang up ...or, from a standard telephone, go off hook and press , then go back on hook.	The Log In/Out LED flashes. New ACD calls are routed to the after-shift destination. **Note** Calls in the queue are directed to your station, because you are the last active Agent. You are logged out when all of the calls in the queue have been answered.

Auto Answer with Zip Tone

Auto Answer with Zip Tone is an ACD feature that alerts you to a call by sounding a one-second dial tone and automatically connecting you to the ACD call. You must have a Toshiba digital or electronic telephone. This feature is unavailable for telephones equipped with a standard rotary dial or a touch-tone dial, or a Toshiba telephone receiving PBX and/or non-ACD calls (see "Quick Reference" on Page 6).

ACD Call

When an ACD call rings at your idle station, the ACD Call LED flashes and your LCD displays the message to the right (**XXX** = Line number).

QUE#000 AGT GP01
LINE XXX ACD CALL

If you receive a PBX call, your ACD Call LED flashes similar to an ACD call and the LCD displays the message to the right (**XXX** = Line number).

QUE#000 AGT GP01
LINE XXX RINGING

If you have a standard telephone without an LCD, the telephone rings.

➤ **To answer an ACD call**

1. Press	The LED lights steady and the LCD displays one of the messages below depending upon the type of call and system programming.
...or, if you have a standard telephone, go off hook to answer the call.	The calling number or name is displayed. **CALLING NUMBER ANSWERED LINEXXX** / **CALLING NAME ANSWERED LINEXXX** The called number or name is displayed. **CALLED NUMBER ANSWERED LINEXXX** / **CALLED NAME ANSWERED LINEXXX** After you answer the call, the LCD displays the information shown on the right. **QUE#000 AGT GP01** / **ANSWERED LINEXXX** **Notes** ♦ If Auto Answer with zip tone is enabled, a zip tone (a short burst of dial tone) is heard and the call is connected (see "ACD Call Pickup" on Page 14).

- If you are on a [DN] or CO Line when the ACD Call line rings or attempts auto answer with zip tone, the ACD call rings and the ring is muted.
- The (and functions are automatically turned on, and the LCD displays ACD call status information.

If you use a headset, the (and functions are turned off (see "ACD Call Pickup" on Page 14).

The duration of each call is displayed every 15 or 60 seconds (determined by system programming) after you have answered the call.

```
QUE#000 AGT GP01
        HH:MM:SS
```

➤ **To view Queue Status instead of name/number**

➤ Press) (LCD button) four times.

ACD Call Pickup

You can pick up an ACD call ringing at another Agent's telephone by using your station's) (button. These calls are detailed in the MIS/SMIS reports.

To use this feature:

- Both stations must be in the same ACD Group.
- The incoming call must be an ACD call for that group.
- The button must be idle.
- Your telephone 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. Another type of pick up button (code) can be provided for these calls.

➤ **To pick up an ACD call ringing at another station**

➤ Press) (...or + ...or, if using a standard telephone, go off hook and press .	The LCD confirms that the line has been answered. The ACD Call LED is on. **Note** If your telephone is in an unavailable mode (LED is on), you must press before you can use) (.	**QUE#000 AGT GP01** **ANSWERED LINEXXX**

ACD Help

You can call your Supervisor for assistance during an ACD call by pressing the button. ACD Help does not apply to PBX or non-ACD calls. This button enables you to:

- Talk to your Supervisor while the ACD call is on hold.
- Establish a three-way conversation with your Supervisor 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 ...or and ...or, if using a standard telephone, hookflash and press .	The call is automatically placed on consultation-hold and your Supervisor's telephone rings. Your LCD displays the held line number and the **SUPRVSR ASSIST** message. **HELP** appears on your Supervisor's LCD. When your Supervisor answers the Help call, you can talk to the Supervisor and the ACD Call remains on consultation-hold. **Note** If your Supervisor is not logged in, this feature is not available. If the Supervisor's telephone is busy or is in monitor mode, your Help call overrides and rings your Supervisor's telephone.	**HOLD LINE 5** **SUPRVSR ASSIST**
2. Press ...or hang up	You and your Supervisor are connected to the caller. Your Supervisor and the ACD caller are connected.	

...or press .	Your Supervisor's telephone receives a busy tone. You and the ACD caller are connected without the Supervisor.

➤ **To override your Supervisor's DND**

1. Press ...or and ...or hookflash and press .	The ACD call is automatically placed on consultation-hold. You receive DND busy tone. **Note** You must have the DND Override option to override the DND feature.
2. Press , .	The DND is overridden and the Supervisor's LCD displays **HELP**.
3. After the Supervisor answers, press	You and your Supervisor are connected to the ACD caller. The LCD displays the line number in use.
...or hang up	Supervisor and ACD caller are connected.
...or press .	Your Supervisor's telephone receives a busy tone. You and the ACD caller are connected without the Supervisor.

End After Call Work

When you have completed an ACD call, your telephone automatically enters After Call Work mode. This 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 After Call Work time limit expires or you end it.

When you have completed your paperwork, you can end the After Call Work time period by pressing + (or making/receiving a non-ACD call.

You can make/receive PBX calls during the After Call Work time period.

➤ To automatically activate After Call Work

➤ Complete your ACD call.	The After Call Work time remaining is displayed in one-second increments.	151 00 : 00 : 04

➤ To automatically deactivate After Call Work

➤ Make/receive a PBX call ...or a non-ACD call.	After Call Work is automatically deactivated and your LCD displays your queue and agent group number, date, day of the week, and the time.	QUE#000 AGT GP01 JUL 27 TUE 02:27

➤ To end the After Call Work time period

➤ Press + (...or a [DN] + (...or go off hook, then on hook.	After Call Work is deactivated by you. Your LCD displays the queue number, agent group, date, day of the week, and the time.	QUE#000 AGT GP01 JUL 27 TUE 02:27

Transferring Calls to an ACD Group

Calls answered from a station or attendant console can be transferred to an ACD Group, a specific Agent, or your Supervisor.

➤ Press + + - - ...or, for single-line phones, hookflash and press + - - .	The call is transferred to the designated group. YY = ACD Group number (01~16). **Notes** • If no Agent is logged in or available, the call routes to the group's after-shift or queue-overflow-point destination as assigned in system programming. • If all Agents in the "transferred to" ACD Group are busy, the call is placed at the end of the group's queue and routed as a normal incoming ACD call in the queue. • After dialing the last digit of the ACD Group number, the call is disconnected from the transferring station.

➤ **To transfer a call to another Agent or Supervisor**

➤ Press + Agent or Supervisor [PDN] or [PhDN] ...or, if you have a standard telephone, hookflash and enter the Agent or Supervisor [PDN] or [PhDN].	**Notes** • Transferring a call to the Supervisor's or another Agent's [PDN] in your group works just like a regular, non-ACD call transfer. These calls are not tracked for MIS purposes. • Calls transferred to an Agent's ACD Call [PhDN] directory number are tracked as PBX calls for MIS purposes.

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Unavailable

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. To enter the Unavailable mode:

- You must be logged in to the ACD Group.
- The station must be idle or you can be talking on a non-ACD or PBX call.

➤ **To use Unavailable**

➤ Press ...or + , ...or, if you have a standard telephone, go off hook and press , .	The Unavailable LED light is steady. If the Unavailable LED flashes, calls are still in the queue and you are the only available Agent in the group. When calls in the queue are cleared, Unavailable is activated and the Unavailable LED lights steady. **Notes** • If you are on an ACD call when you press , the Unavailable LED flashes and puts you in the Unavailable pending mode. When the ACD call ends, Unavailable mode is activated automatically. • If two successive ACD calls are not answered at your telephone, your telephone automatically goes into Unavailable mode.

➤ **To cancel Unavailable mode**

➤ Press ...or, if you have a standard telephone, go off hook, and press , .	When the Unavailable LED goes off, the station is returned to available status.

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Work Unit

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 coded information is recorded by Management Information Systems (MIS) or Software Management Information Systems (SMIS) (if the system is equipped with MIS or SMIS) and sent to the system Station Message Detail Report (SMDR) for printing.

Work Unit codes must be entered correctly for proper registration. If you only enter one digit, and the code is two digits, the call is not registered until you have recorded the second digit. You are not allowed to re-enter a code to correct an inaccurate entry until the correct number of digits has been entered even if they are incorrect.

Multiple Work Units can be entered for the same call, but only the last code entered is the one registered in the system SMDR report. Only the current code is shown on the SMIS and MIS displays, but all of the entered codes are listed on the SMIS and MIS reports.

Work Units are not registered on PBX or non-ACD calls.

➤ **To enter a Work Unit code**

1.	Press + (...or and . ...or, if you have a standard telephone, hookflash and press . .	You are prompted to enter the Work Unit code. Conversation is not interruped and the Work Unit LED does not turn on. This feature works only during an ACD call. **QUE#000 AGT GP01 ENTER STRK DIAL**
2.	Enter the Work Unit digits.	The digits are displayed on the LCD as entered, and the LCD returns to a normal display after the last digit is entered.

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Access Codes

This appendix provides a list of feature/button names and the corresponding access code sequences. If your telephone does not have the ACD feature buttons shown in the left hand column, you can enter the access code sequence to perform the same function (see Table 4).

Toshiba proprietary telephones must have an button to log into an ACD Group and receive ACD calls and originate/receive PBX calls. Standard telephones do not require an button; ACD and PBX calls are made/received on a standard telephone [PDN].

Table 4 ACD Feature Access Codes

Features	Access Code Sequence
ACD Call Pickup	[1] + ([3]) +
ACD Help	[2] + ([3])
End After Call Work	[1] (Off-hook/On-hook)
Log In/Out	[1] + ([3]) , + - - - - [4]
Transfer to ACD Group (Speed Dial Button)	[2] + ([3]) + . . [5]
Unavailable	[1] + ([3]) /
Work Unit	[2] + ([3]) 0

[1] The button can be any [PhDN] button that appears only on the Agent telephone. If using a standard telephone, go off-hook and dial the access code after receiving an internal dial tone.

[3] If using a standard telephone, hook-flash (1/2 second on/off hook) and dial the access code after receiving internal dial tone.

[4] For rotary telephones, dial instead of (.

[5] XXXX = Agent ID code.

[6] YY = ACD Group (01~16 on large systems and 01~08 on small systems).

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