Feature Package 3

TRIAD-S, 1/2/3
ACD User Guide

TRI∆D®

TRIAD™-S, 1/2/3 Digital Telephone Systems

(Feature Package 3)

Automatic Call Distribution (ACD) User Guide

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Issue	Release Date	Changes
1	12-98	Includes Feature Package 1 enhancements.
2	8-99	☐ Includes Feature Package 2 {FP2} enhancements. ☐ User Guide content contains extensive revisions.
3	5-00	☐ Includes Feature Package 3 {FP3} enhancements. ☐ User Guide has been reformatted.

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ACD Agent Features

A Flexible button must be programmed to use some of the following features. Refer to Programming Flexible Buttons.

Agent Help Request

The ACD Agent Help feature allows an ACD agent to signal their assigned supervisor for assistance.

While the agent is on a call:

Press the HELP Flexible button (if pre-programmed).

☐ Confirmation tone will be heard by the agent.

☐ HELP button LED will be lit if a supervisor is logged into the agent's ACD group.

☐ If a supervisor is not logged in, the agent will receive error tone.

The ACD supervisor receives a Help request message if they are a member of one of the ACD groups they are assigned to. The Help function sends a Camp-On tone to the supervisor's speaker. The Help request takes precedence over any other messages and can be cleared by the supervisor by pressing their HELP button.

When the supervisor receives a Help request, they can press the HELP button followed by the OVERRIDE button to bridge onto the ACD group member's call. The HELP button will place an intercom call to the station requesting help.

The Help message will be cleared after the supervisor's HELP button is depressed.

Only Digital Telephones are capable of activating this feature.

Agent Login

A Flexible button must be programmed to use some of the following features. Refer to Programming Flexible Buttons.

Primary Agents

The Primary Agent Assignment feature allows the stations serving as primary agents to be entered into the ACD group. Agents can login to both a primary and secondary group. A primary agent's ACD calls from their primary group are always presented ahead of any ACD calls in their secondary group.

1. Press the PRIMARY AGENT flexible button (if pre-programmed). The display shows:

```
ENTER AGENT ID
MM/DD/YY        HH:MM:SS
```

Figure 1: Primary Setup Display

-or-

Dial [571]+ [UUU]. *(UUU = 550-565)*

2. Enter your 4-digit ID. Confirmation sound is heard and display updates with new primary agent number listed.

Secondary Agents

The Secondary Agent Assignment feature allows the stations serving as secondary agents to be entered into the ACD group. Agents can login to both a primary and secondary group. A secondary agent's ACD calls from their primary group are always presented ahead of any ACD calls in their secondary group.

1. Press the SECONDARY AGENT flexible button (if pre-programmed). The display shows:

```
ENTER AGENT ID;
MM/DD/YY        HH:MM:SS
```

Figure 2: Secondary Agent Setup Display

-or-

Dial [582] + [UUU]. (*UUU = 550-565*)

2. Enter 4-digit ID. Confirmation is heard and the display updates with new secondary agent number listed.

To logout:

Dial [581].

Available/Unavailable Mode

If you are an ACD Agent, you may place your station in the Available mode to receive ACD calls, or the Unavailable mode to block ACD type of calls from ringing your station.

To receive ACD calls (Available mode):

Dial [566], or press the AVAIL/UNAVAIL Flexible button (if pre-programmed). You may now receive calls.

To block ACD calls (Unavailable mode):

Dial [566], or press AVAIL/UNAVAIL Flexible button (if pre-programmed).

```
UNAVAILABLE ACD    *125*
MM/DD/YY       HH:MM am
```

Figure 3: ACD Unavailable Display

Activating this feature makes you UNAVAILABLE to both Primary and Secondary ACD Groups.

Call Qualification

This feature allows an ACD agent to enter codes on ACD type calls that identifies the call. 12 digits can be entered, however, only up to four digits can be entered for the ACD SMDR reporting function.

While on a call:

1. Press the CALL QUALIFY Flexible button (if pre-programmed).
2. Then enter the four-digit qualify code.
3. Enter a [✷] to complete the sequence.

   A short burst confirmation tone will be heard through the keyset speaker, if programmed.

Calls In Queue

From an idle display key telephone:

1. Dial [567], or press the QUEUE Flexible button (if pre-programmed). ON/OFF button LED lights steady.

2. Dial a three-digit ACD group number (550-565).

   Your display will tell you how many calls are in queue for that group. (Dynamic update of display occurs as queue condition changes.)

```
ACD5XX 00 CALLS IN QUEUE
MM/DD/YY        HH:MM am
```

Figure 4: ACD Calls in Queue Display

3. Replace handset or press ON/OFF button to terminate.

   This feature cannot be used with a call-in-progress and the station will be considered busy for incoming calls. The indicator will only display calls in queue for the Primary group.

Overflow Station–Available/Unavailable Mode

If you are an ACD Overflow station, you may place your station in the Available mode to receive ACD calls, or the Unavailable mode to block ACD calls from ringing your station.

To receive ACD calls (Available mode):

Dial the Available/Unavailable code [578], or press the AVAIL/UNAVAIL Flexible button (if pre-programmed).

To block ACD calls (Unavailable mode):

Dial the Available/Unavailable code [578], or press the AVAIL/UNAVAIL Flexible button (if pre-programmed).

ACD Supervisor Features

A Flexible button must be programmed to use some of the following features. Refer to Programming Flexible Buttons.

Group Member Status

This feature provides a means for an ACD supervisor/Agent to view the status of the 16 ACD groups in the system. This display will tell the supervisor which stations are logged into the group, if the station logged in is available/unavailable, out of service, in DND, or busy on a call. The display could be used to determine why there are so many queued calls in a specific group.

```
ACD 5XX 110A 111A 112A
113O 114U 115D 116B 117N
```

(N) = Not equipped
(D) = Do Not Disturb
(O) = Out of Service
(U) = Unavailable
(B) = Busy on a call
(A) = Available

Figure 5: ACD Group Member Display

Any station (Supervisor/Agent) logged into the ACD group can bring up the Group Member display by:

1. Dial the Group Member Status code, [573], or press the STATUS Flexible button (if pre-programmed).

2. Dial an [✳] to scroll up to the next ACD group, or a [#] to scroll down to the previous ACD group.

> *To return to an idle display: The station (Supervisor/ Agent) can return to an on-hook condition.*

Monitor w/Barge-In

> *The Executive Override code [625] is used to program this feature onto a flexible button.*
> *Executive Override is a System feature and therefore takes precedence over this feature. If Supervisor Monitor w/Barge-In is to be used properly, Executive Override MUST be disabled, otherwise the Barge-In is performed with the MUTE button OFF.*

This feature allows an ACD supervisor to monitor an agent's call in progress in order to provide assistance in training ACD personnel. A supervisor may intrude onto an agent's call in a listen only mode or in a true conference mode. This feature is available with or without a warning tone.

To monitor call in **listen only mode**:

1. Dial the three-digit station number of the agent's station.

2. Upon hearing a busy tone, press the BARGE-IN Flexible button (if pre-programmed).

    The conversation in progress will be heard by the supervisor on the handset, and the supervisor's MUTE LED will be lit indicating that the supervisor's transmit is muted.

To join the conversation in a **true Conference mode**:

Depress the MUTE button.

The use of Supervisor Monitor with Barge-In is limited by federal law and may also be limited or prohibited by state or local laws. Check the relevant laws in your area before employing these features. A change in volume may occur on the CO Line or intercom call after the barge-in occurs

Queue Status

This feature allows an ACD supervisor to view the status of their ACD group. This display is an idle state display and will prompt a supervisor that a group is having problems answering all their calls. The display will tell the supervisor how many calls are in queue, how many agents are logged into the ACD group, and the length of time in minutes that the oldest call has been in queue.

```
5XX; CIQ: XX AL:XX OC:XXX
MM/DD/YY        HH:MM:SS
```

Figure 6: ACD Queue Status Display

For the supervisor station logged into the ACD group to obtain the calls in queue display:

Dial the Queue Status code [577] followed by the ACD group (550-565) that the supervisor wants to observe, or press QUEUE STATUS Flexible button (if pre-programmed).

If the supervisor wants to change the display to a different group:

> Dial the Queue Status code [577] followed by the new ACD group number (550-565) the supervisor wants to observe, or press the QUEUE STATUS Flexible button.

Supervisor Login

The Supervisor Login/Logout feature provides a means for a supervisor to log into one of the ACD groups and monitor calls. For a supervisor to be placed into an active ACD state, the supervisor must first login.

1. Lift the handset or press the ON/OFF button.
2. Dial the LOGIN code [576] followed by the ACD group number (550-565) that the Supervisor is going to log into, or press the LOGIN Flexible button (if pre-programmed).
3. Enter unique SUPV ID code (0000-9999). The LOGIN button LED will be lit steady. Confirmation tone is heard and the supervisor is logged onto the ACD group.

When the supervisor logs in, an ACD login event is sent to the active ACD SMDR port.

Supervisor Logout

For a supervisor to remove himself from the ACD group as an active agent:

1. Lift handset or press ON/OFF button.
2. Dial the LOGOUT code, [575] followed by the ACD group number (550-565) that the supervisor is going to log out of, or press the LOGOUT Flexible button (if pre-programmed).

The LOGIN Flexible button LED will extinguish.

When the supervisor logs out and removes themselves from the ACD group, an ACD Logout event is sent to the active ACD SMDR port.

User Programming

Programming Flexible Buttons

1. Press the SPEED button twice.
2. Press button to be programmed (it must be programmed in the database as a Flexible button).
3. Dial the desired code.

Programmable Flexible Button Codes

Code	Feature
55[A]	ACD Group Pilot Numbers
566	ACD Available/Unavailable
567[UUU][a]	ACD Calls In Queue
570[BB][b]	ACD Call Qualifier
571	ACD Agent Logout (Primary Group)
572[UUU]	ACD Agent Login (Primary Group)
573	ACD Group Member Status
574	ACD Supervisor/Agent Help
575	ACD Supervisor Logout

Programmable Flexible Button Codes

Code	Feature
576 55[A]	ACD Supervisor Login
577 55[A]	ACD Supervisor Queue Status
578	ACD Overflow Station Available/Unavailable
581	ACD Agent Logout (Secondary Group)
582	ACD Agent Login (Secondary Group)

a.   [UUU] = 550-565
b.   [BB] = Button Number

To erase a flexible button:

1. Press the SPEED button twice.
2. Press the flexible button to be erased.
3. Press the FLASH button. Confirmation tone will be heard.
4. Replace handset or press ON/OFF button.

Directory Worksheets

Flexible Button Programming Worksheet

1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24

Speed Dial Bin Programming Worksheet

BIN 000		BIN 010	
BIN 001		BIN 011	
BIN 002		BIN 012	
BIN 003		BIN 013	
BIN 004		BIN 014	
BIN 005		BIN 015	
BIN 006		BIN 016	
BIN 007		BIN 017	
BIN 008		BIN 018	
BIN 009		BIN 019	

ACD Numbering Plan

Feature	Code	Feature	Code
ACD* Agent Help	574	ICLID Display (Answered Calls)	659
ACD* Agent Login (Primary Group)	572+[5UU]	ICLID Display (Unanswered Calls)	635
ACD* Agent Login (Secondary Group)	582+[5UU]	Incoming CO Call Transfer	639
ACD* Agent Logout (Primary Group)	571	Internal All Call Page	709
ACD* Agent Logout (Secondary Group)	581+[5UU]	Internal Page Zone 1-8	701-708
ACD* Call Qualifier Code	570+[YYY]	Keyset Mode	648+[#,✳]
ACD* Group Member Status Display	573	Last Number Redial	[SPEED]+[#]
ACD* Group Pilot Numbers	5+[UU]	Least Cost Routing (LCR) Access	9
ACD* Status Overflow Avail/Unavail	578	LCR Queue Cancel	626
ACD* Supervisor Login	576+[5UU]	Meet-Me-Page Answer	770
ACD* Supervisor Logout	575+[5UU]	Message Wait	623
ACD* Supervisor Queue Status Display	577+[5UU]	Modem Via DISA Access or Tfr	499
ACD* Available/Unavailable	566	Name in Display Programming	690
ACD* Calls in Queue Display	567	Off-Hook Preference	691+[BB]
All Call Forward	[FWD]	OVHO Enable	628
All Call Page	700	Personalized Messages	633+[ZZ]
Attendant	0	Personalized Msg Flexible Btn	633+[#]
Background Music	632+[0,1,2]	Personal Park	438
Call Forward - Busy	[FWD]+[8]	Pool Group	81-87
Call Forward - Busy/No Answer	[FWD]+[9]	Repeat Redial	643
Call Fwd - Clear DND, Personalized Msgs	662	Save Number Redial	[SPEED]+[✳]
Call Forward - No Answer	[FWD]+[7]	Scroll Canned Messages	637+[#]+[#,✳]
Call Forward - Off Net	[FWD]+[✳]	Specific CO Line	88+[LLL]
Call Park Location	43+[C]	Speed Dial Access	[SPEED]+[YYY]
Call Park Pickup	#0	Station Relocate	636+[XXX]
Clear Personalized Messages	633+[00]	Tone Mode Ring Option	6#+[XXX]
CO Line Group (If LCR is enabled)	800	UCD Group Pilot Numbers	55+[U]
CO Line Groups 1-24	801-823	Universal Day/Night Answer	#5
Dial By Name	6✳	VM Group Pilot Numbers	44+[V]
Dial Speed Directory	680		
Distinctive Ring	695		
Do Not Disturb	631	LEGENDS:	
Executive Override/Monitor Barge-in	625	BB = Button Number	
Extension Numbers - *Triad-S*	100-131	C = Call Park Location 0-7	
Extension Numbers - *Triad 1/2*	100-171	H = Hunt Group Number 0-7	
Extension Numbers - *Triad 3*	100-351	LLL = Line Number 001-144	
External All Call Page - *Triad 1/2/3*	76+[O]	P = External Page Zone Number 1-2	
External Page - *Triad-S*	761	U = UCD Group Number 0-7	
External Page Zones - *Triad 1/2/3*	76+[P]	UU = ACD* 50-65	
Follow-Me Forward	642	V = Voice Mail Group Number 0-7	
Forward Overide	5#	XXX = Station Extension Numbers	
Group Call Pickup	#0	YYY = Speed Dial Bin Number	
Headset Mode	634	ZZ = Personalized Message Number	
Hunt Group Pilot Numbers	45+[H]		

* Features available with optional software.