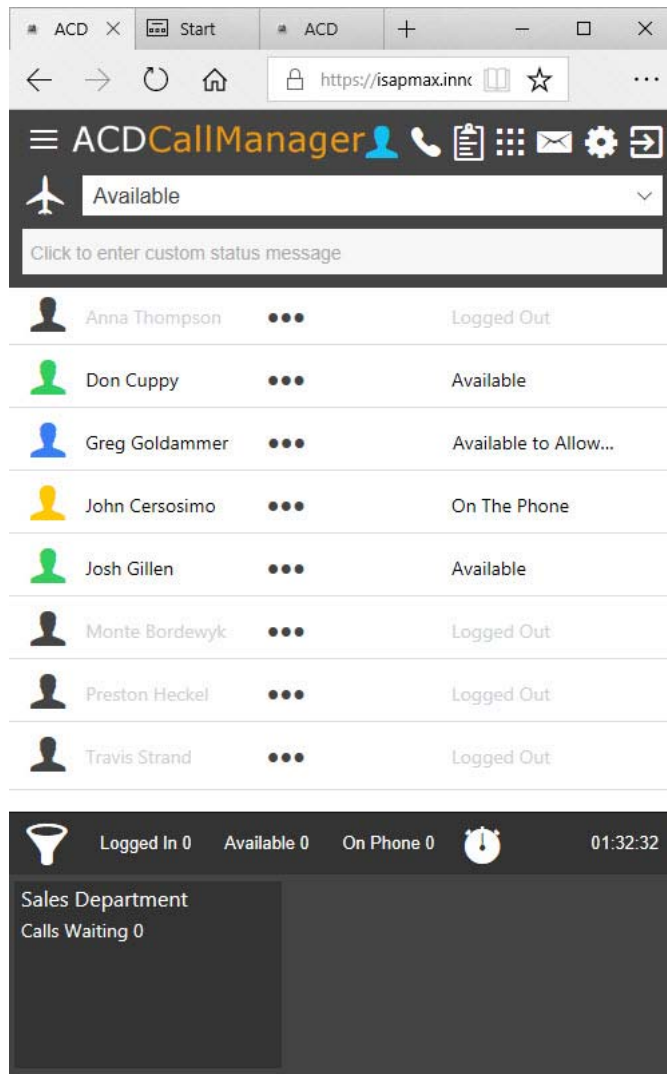


ACD – Call Manager User Guide



Please Read this Important Note!

For the ACD software to function at maximum efficiency it is important that ALL calls are placed and received through the ACD Call Manager. Supervisor/Management reports generated by the system will not be accurate unless calls are taken and made with the software.

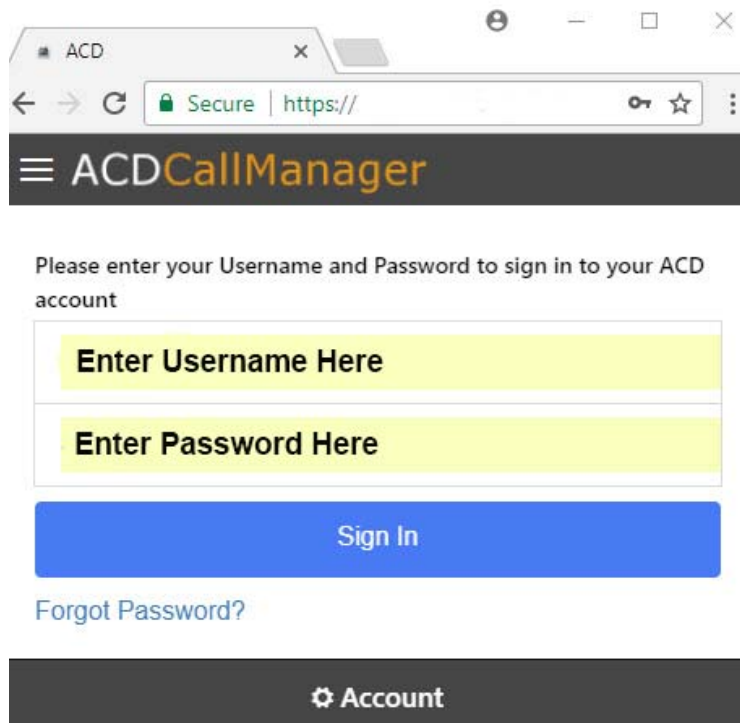
The following user guide will show you how to, manage and place calls with your ACD Call Manager.

There is also a Basic Call Manager User Video, please contact us if you would like access to this video.

Activating The ACD Call Manager

1. You Must Log-in through a Website Address

- Using this web address: (<https://starapmax.stmc.net/ACDWeb>) copy and paste it into a supported browser – Google Chrome, Microsoft Edge, Mozilla
- You will then need to log in with your unique User ID and Password provided by our office.



ACD

Secure | https://

ACD Call Manager

Please enter your Username and Password to sign in to your ACD account

Enter Username Here

Enter Password Here

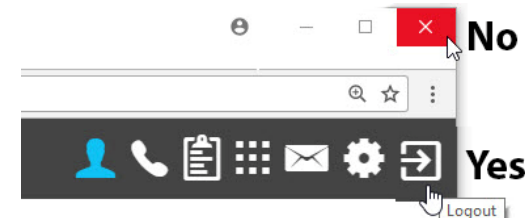
Sign In

[Forgot Password?](#)

Account

****New passwords need to be strong with at least 8 characters.***

Very Important: It is imperative that you click on the Log Out icon instead of closing the browser when you leave the Call Center.

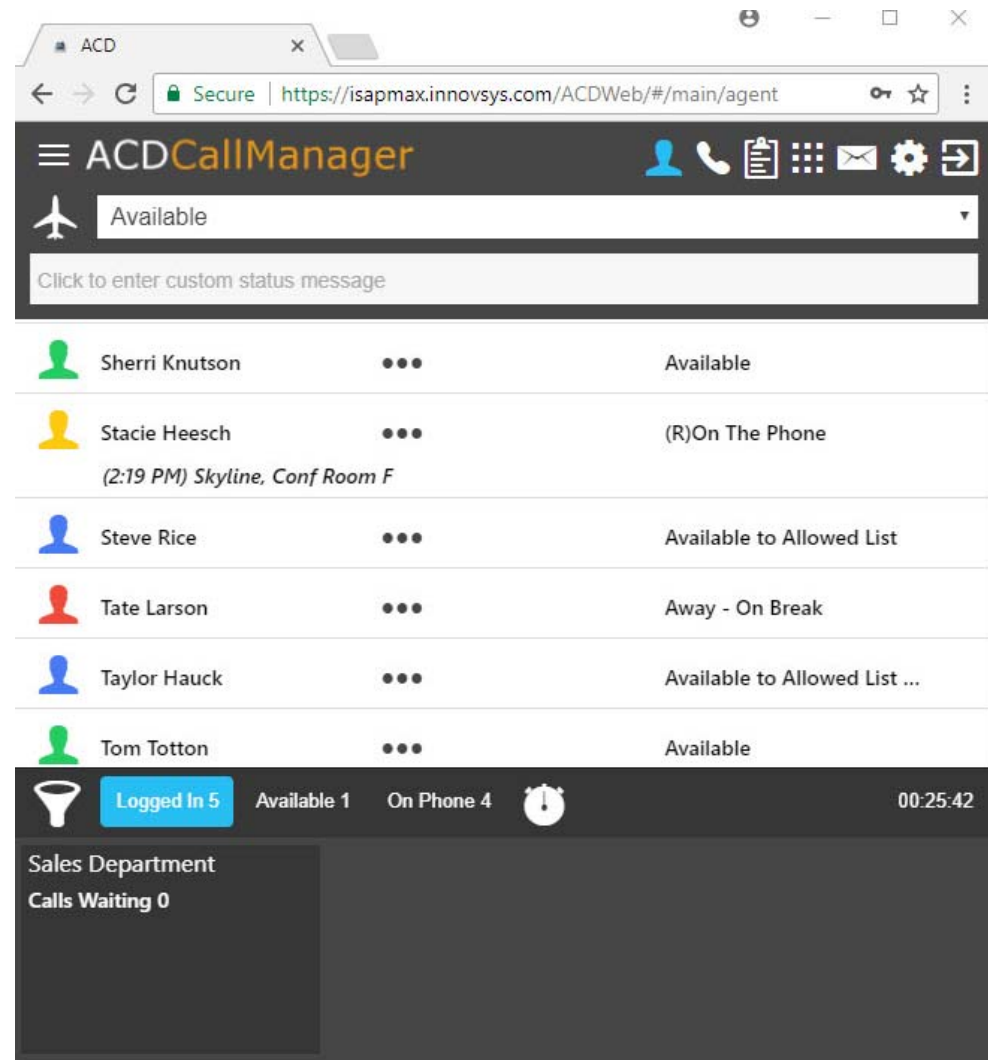


The service will not retain new contact information or change your status to Logged Out if you don't use the Log Out button.

If you know your Username, you can click on Forgot Password and reset information will be emailed to the email address associated with your ACD Agent account.







Status Definitions

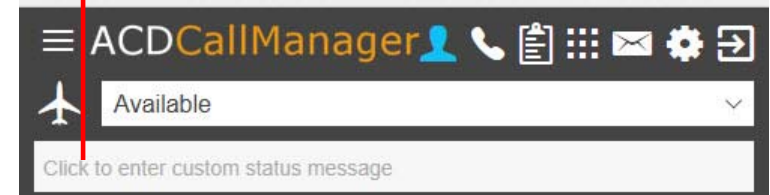
- When an agent logs in they will be available to take calls
- Your Status can be managed by clicking on the Status drop down bar
- See Status definitions on the next page



Status Definitions - *Continued*

- Available: Your phone will ring
- Available as Needed: Your phone will ring if all other Agents are unavailable
- Available to Allowed List: Only numbers from your Allowed List will ring to your phone - Programmable from the Options Menu
- Available to Allowed List and Direct Dials: Calls from allowed list, and calls to your direct number will ring to your phone

	Sherri Knutson	...	Available
	Stacie Heesch	...	(R)On The Phone
	<i>(2:19 PM) Skyline, Conf Room F</i>		
	Steve Rice	...	Available to Allowed List
	Tate Larson	...	Away - On Break
	Taylor Hauck	...	Available to Allowed List ...
	Tom Totton	...	Available



You can enter a "Custom Status Message" that other agents in the call center can view

Definable by the Service Provider – *Please contact our office for status setting changes*

- Away - At Lunch: No calls will ring to your phone during this setting
- Away - In a Meeting: No calls will ring to your phone during this setting
- Away - On Break: No calls will ring to your phone during this setting
- Away – Working on a Project: No calls will ring to your phone during this setting
- Non-ACD Outbound Call: Agent originates a call from the dial pad on phone – Calls with this status setting will not be displayed in the ACD Reports

In-Call Options

Activate these options by left-clicking on three dots next to the agent and select one the following options in the drop-down menu

- Blind Transfer
- Private Call
- Conference
- Send to VM

Important Note:

Designated supervisors can have additional options to Listen to Agent calls and to override their availability status. Please contact our office to add these options to an Agents Call Manager.

The screenshot displays the ACDCallManager interface. At the top, there is a header with the title "ACDCallManager" and several icons including a person, a phone, a clipboard, a grid, an envelope, a gear, and a refresh symbol. Below the header, there is a status bar with a dropdown menu currently set to "Available" and a text input field for a custom status message. The main area shows a list of agents with their names, a three-dot menu icon, and their current status. A dropdown menu is open for Scott Meyer, showing options: "Blind Transfer", "Private Call", "Conference", and "Send to VM". The phone number "(605) 999-7438" is also visible next to Scott Meyer's name. At the bottom, there is a summary bar showing "Logged In 1", "Available 0", and a timer "00:02:09".

Agent Name	Status	Options
Howard Fuller	Logged Out	...
Jennifer Pavlicek	Logged Out	...
John Muller	Logged Out	...
Melissa Waddell	Logged Out	...
Randy Kee	Logged Out	...
Scott Meyer	(605) 999-7438	Blind Transfer, Private Call, Conference, Send to VM
Scott Sobolewski	Logged Out	...
Steve Garrow	Logged Out	...

In Call Options - Definitions

- **Blind Transfer:** This allows an agent to transfer a customer call to another agent. Once the call has been transferred, the agent can no longer access the call. Left click on the three dots next to the Agent who you want to receive the Blind Transfer and then left click on Blind Transfer.
- **Private Call:** The customer is on hold so that the agent can speak privately with another agent. The customer can then be let back into the conversation. Left click on the three dots next to the agent you want to talk to, select Private Call and then Left click to make the Private Call. The caller will be automatically Placed on Hold. Click on Place on Hold to bring the Caller back into the call.
- **Conference:** The caller, agent and another selected agent are all placed in a Conference Call. Left click on the three dots next to the agent you want to Conference with, select Conference and then Left click to make the Conference Call. The Transferring Agent can hang up any time Any of the three parties can hang up after the Conference Call has been established.
- **Send to VM:** This will direct the caller to the voice mailbox of a selected agent. Left click on the three dots next to the agent who you want to receive the voicemail and then Left click on Send to VM and the caller will be sent directly to the agent's voice mailbox.

Incoming Call

- Pop-up display



- Pick-up phone
- Call in session

A screenshot of a web browser displaying the ACDCallManager interface. The browser address bar shows "https://isapmax.innovsys.com/ACDWeb/#/mai...". The interface has a dark header with "ACDCallManager" and various icons. Below the header is a status dropdown menu currently set to "Available" with an airplane icon. A text box below that says "Click to enter custom status message". A list of agents follows, each with a profile picture, name, and status: Howard Fuller (Logged Out), Jennifer Pavlicek (Logged Out), John Muller (Logged Out), Melissa Waddell (Logged Out), Randy Kee (Logged Out), Scott Meyer (Active, with phone number (605) 999-7438), Scott Sobolewski (Logged Out), and Steve Garrow (Logged Out). At the bottom, a summary bar shows "Logged In 1", "Available 0", "On Phone 1", and a timer at "00:02:09". Below this bar are call details: "Mitchell, SD", "605-999-7438", and "Sales Department". To the right of these details are several action buttons: "Transfer" (with a circular arrow icon), "Park" (with a circular arrow icon), "Pause Recording" (with a circle icon), "Place on Hold" (with a circle icon), and "Flag This Call" (with a circle icon).

Incoming Call - In Session

Caller Interactions

- Transfer – You can use the Call Manager to send Callers to other Call Center Agents
- Park – Allows you to Park a caller who can be taken out of Park by any Call Center Agents when they click on the Parked icon in the Menu bar. Callers in Park can hear music or other announcements.
- Pause Recording – Stops Recording of an in-progress call
- Place On Hold – Callers On Hold can hear music or other announcements. This caller is not in Park and can only be retrieved by the agent that placed them on Hold.
- Flag This Call - Will be noted as Flagged Call in the ACD Call History and in the database report


The screenshot displays the ACD Call Manager web interface. At the top, there's a navigation bar with the title 'ACD Call Manager' and a status dropdown menu set to 'Available'. Below this is a list of agents with their names and status. The bottom section shows call control options for a specific call.

Agent Name	Status
Howard Fuller	Logged Out
Jennifer Pavlicek	Logged Out
John Muller	Logged Out
Melissa Waddell	Logged Out
Randy Kee	Logged Out
Scott Meyer	(605) 999-7438
Scott Sobolewski	Logged Out
Steve Garrow	Logged Out

Call Control Options	
Mitchell, SD	<input checked="" type="radio"/> Transfer
605-999-7438	<input checked="" type="radio"/> Park
Sales Department	<input type="radio"/> Pause Recording
	<input type="radio"/> Place on Hold
	<input type="radio"/> Flag This Call

Incoming Call - Transfer Actions

The ACD Call Manager gives you several options for transferring your calls, clicking on the Transfer arrow icon will open a transfer options pane which will allow you to:

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 

Assisted Transfer Options include:

- Place caller on hold
- Agent talks to third party
- Agent takes caller off hold

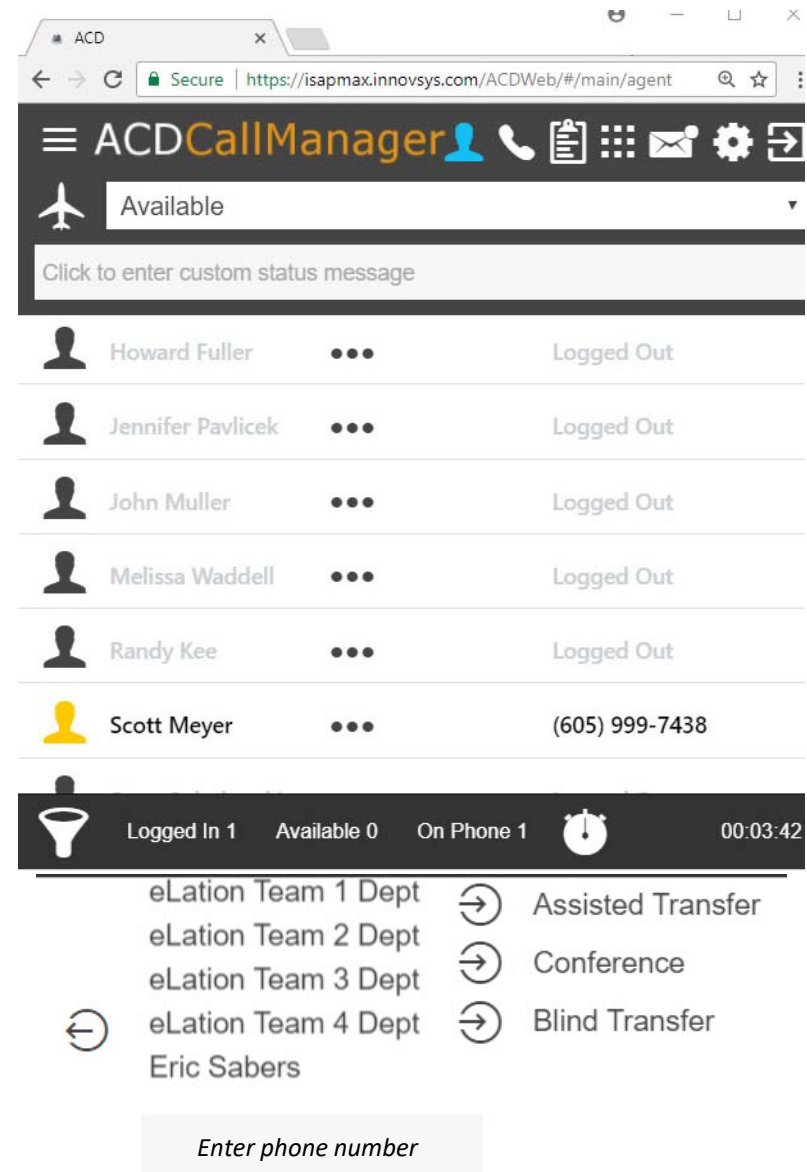
Conference

- Make a conference with caller/agent/third party


Blind Transfer

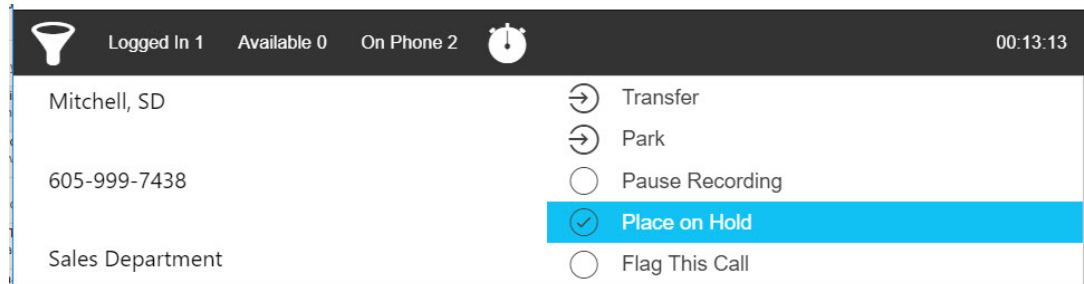
- Connect the caller and third party


Clicking on the back arrow icon will take you back to the previous pane.




Incoming Call - Assisted Transfer

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 
then
- Select Assisted Transfer
 - The Caller is automatically Placed on Hold allowing the Transferring Agent and the Third Party to communicate privately.
 - Click Place on Hold to take Caller off hold and connect the Transferring Agent, Third Party and the Caller into a Conference.
 - The transferring Agent can hang up any time after the three way call has been established.



Cancel Transfer Option  Cancel Transfer
An Agent may Cancel the Assisted Transfer prior to the Third Party answering the call by clicking on the Cancel Transfer arrow.

Incoming Call - Conference

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 

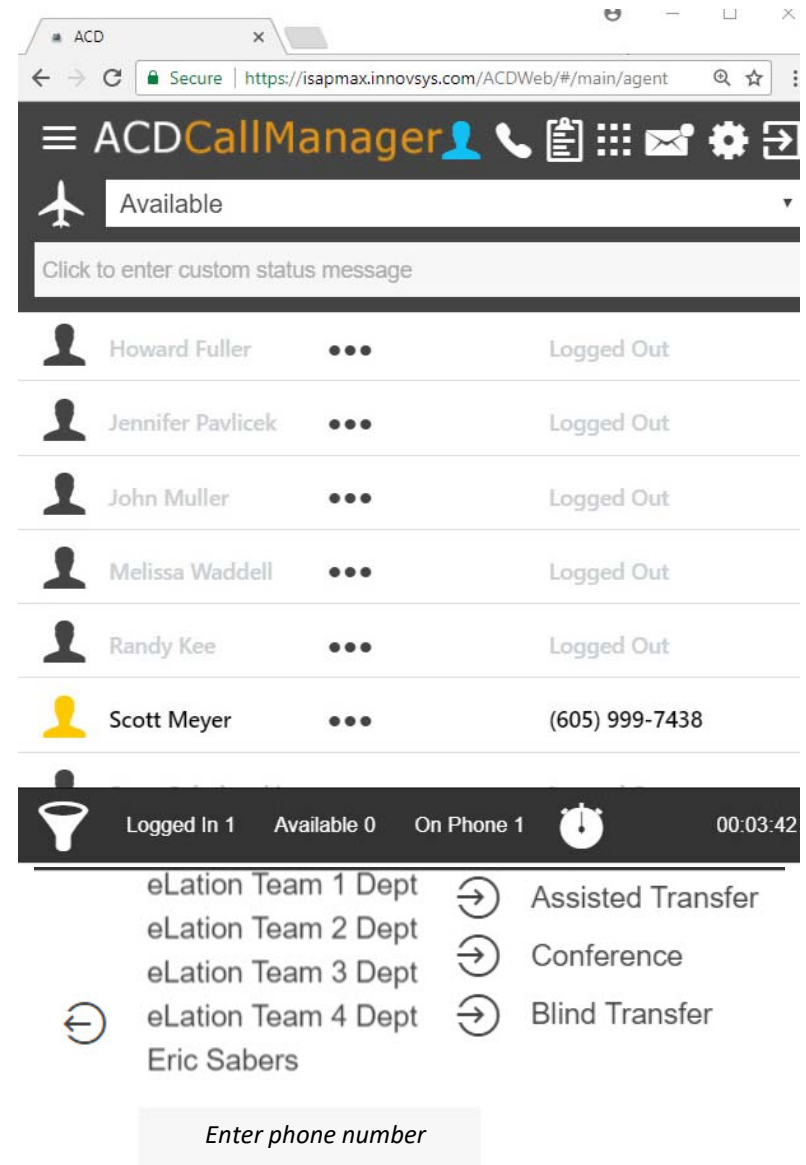
then

Select Conference

- The Caller, Transferring Agent and Third Party are all Placed in a Conference Call.
- The Transferring Agent can hang up any time after the three way Conference Call has been established.

Cancel Transfer Option Cancel Transfer

An Agent may Cancel the Conference Transfer prior to the Third Party answering the call by clicking on the Cancel Transfer arrow.




The screenshot displays the ACDCallManager web interface. At the top, the status is 'Available'. Below this, a list of agents is shown, all with 'Logged Out' status except for Scott Meyer, who is highlighted in yellow and has the phone number (605) 999-7438. At the bottom, a transfer options menu is visible, including 'Assisted Transfer', 'Conference', and 'Blind Transfer'. A 'Cancel Transfer' arrow icon is also present. A text input field at the bottom prompts the user to 'Enter phone number'.

Agent Name	Status	Phone Number
Howard Fuller	Logged Out	
Jennifer Pavlicek	Logged Out	
John Muller	Logged Out	
Melissa Waddell	Logged Out	
Randy Kee	Logged Out	
Scott Meyer	Logged Out	(605) 999-7438


Transfer Options:

- Assisted Transfer
- Conference
- Blind Transfer

Cancel Transfer 

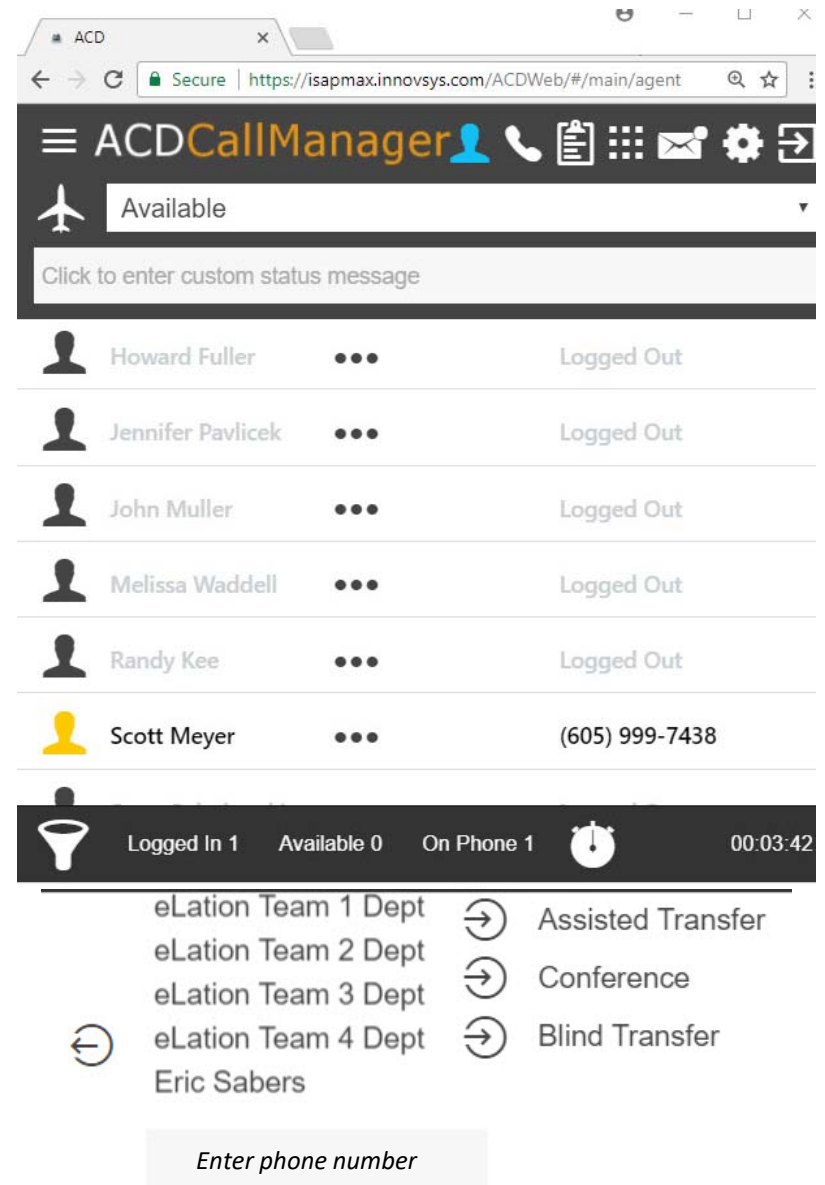
Enter phone number

Incoming Call – Blind Transfer

- Transfer to any 10 – digit number (you must include the Area Code)
- Transfer to Any ACD department or Agent
- Transfer to Anyone in Your ACD Contacts 
then

Select Blind Transfer

- The Caller is then automatically Transferred. Once the call has been transferred, the agent no longer may access the call.



The screenshot shows the ACDCallManager web interface. At the top, the browser address bar displays the URL <https://isapmax.innovsys.com/ACDWeb/#/main/agent>. The page header includes the ACDCallManager logo and a navigation menu. Below the header, there is a status bar showing "Available" and a field for a custom status message. A list of agents is displayed, including Howard Fuller, Jennifer Pavlicek, John Muller, Melissa Waddell, Randy Kee, and Scott Meyer (who is currently logged in). At the bottom, a transfer menu is visible with options: "Assisted Transfer", "Conference", "Blind Transfer", and "Eric Sabers". A text input field labeled "Enter phone number" is located at the bottom of the interface.

Agent Name	Status	Phone Number
Howard Fuller	Logged Out	
Jennifer Pavlicek	Logged Out	
John Muller	Logged Out	
Melissa Waddell	Logged Out	
Randy Kee	Logged Out	
Scott Meyer	Logged In	(605) 999-7438

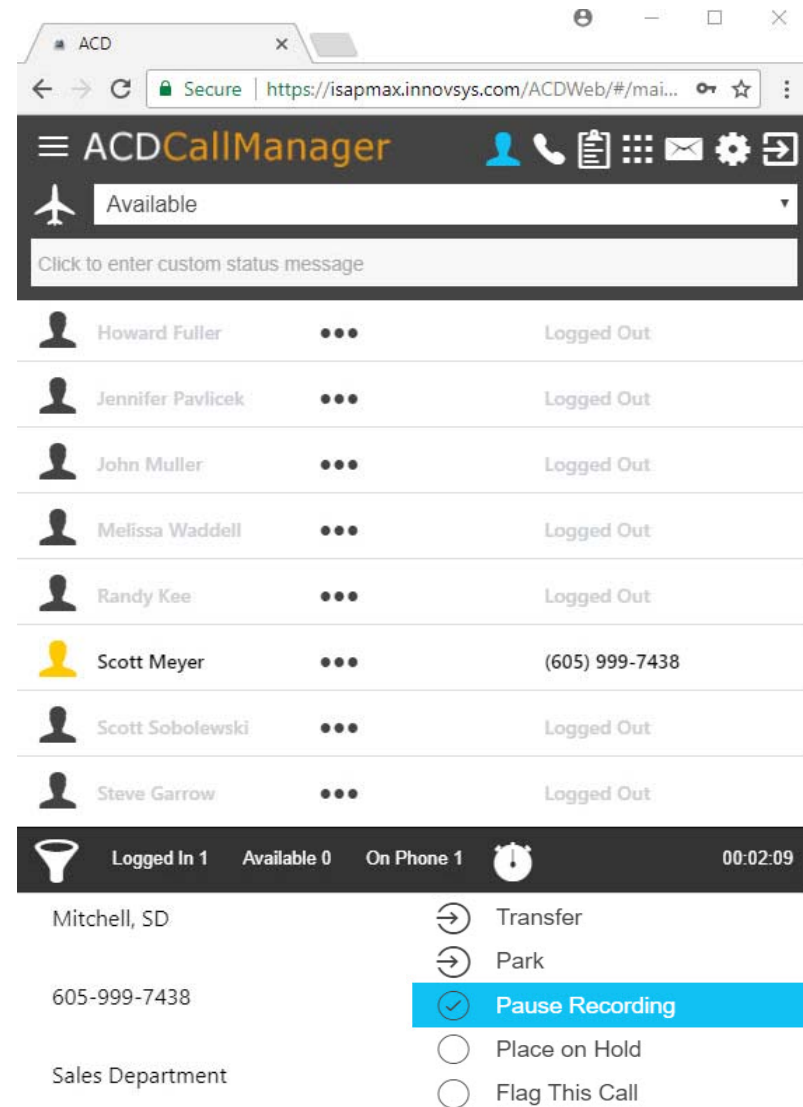
Transfer Options:

- Assisted Transfer
- Conference
- Blind Transfer
- Eric Sabers

Enter phone number

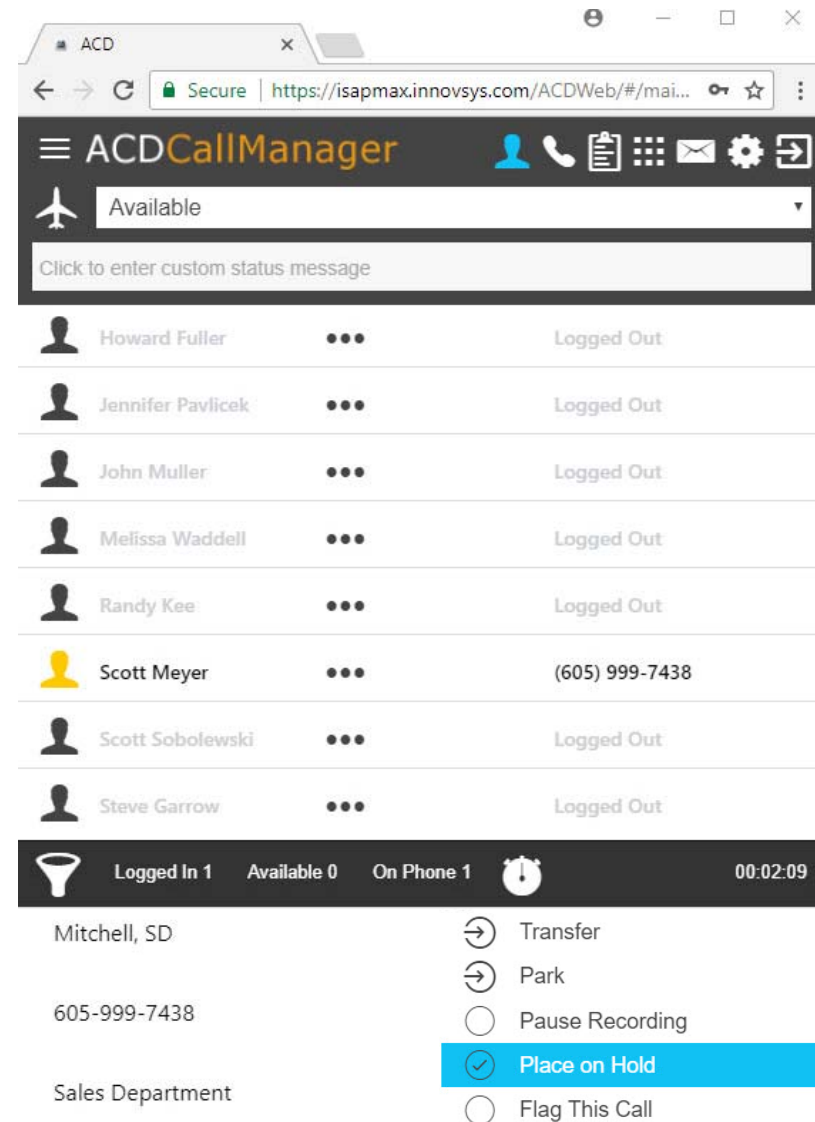
Incoming Call - Pause Recording

- Click on Pause Recording to stop the recording that is captured by the ACD Service.
- Click on Pause Recording a second time to resume recording.



Incoming Call - Place on Hold

- Click Place on Hold to put a Caller on hold where they can hear music or other announcements
- Click Place on Hold a second time to speak to the caller
- Please contact our office to request changes to your on hold announcements



The screenshot displays the ACDCallManager web interface. At the top, there is a navigation bar with the text "ACDCallManager" and several icons. Below this is a status bar showing "Available" and a field for a custom status message. A list of agents follows, each with a profile picture, name, and status. The agents listed are Howard Fuller, Jennifer Pavlicek, John Muller, Melissa Waddell, Randy Kee, Scott Meyer, Scott Sobolewski, and Steve Garrow. At the bottom, there is a call control menu with a funnel icon and a timer showing "00:02:09". The menu includes options for "Transfer", "Park", "Pause Recording", "Place on Hold" (which is selected and highlighted in blue), and "Flag This Call".


Agent Name	Status
Howard Fuller	Logged Out
Jennifer Pavlicek	Logged Out
John Muller	Logged Out
Melissa Waddell	Logged Out
Randy Kee	Logged Out
Scott Meyer	(605) 999-7438
Scott Sobolewski	Logged Out
Steve Garrow	Logged Out

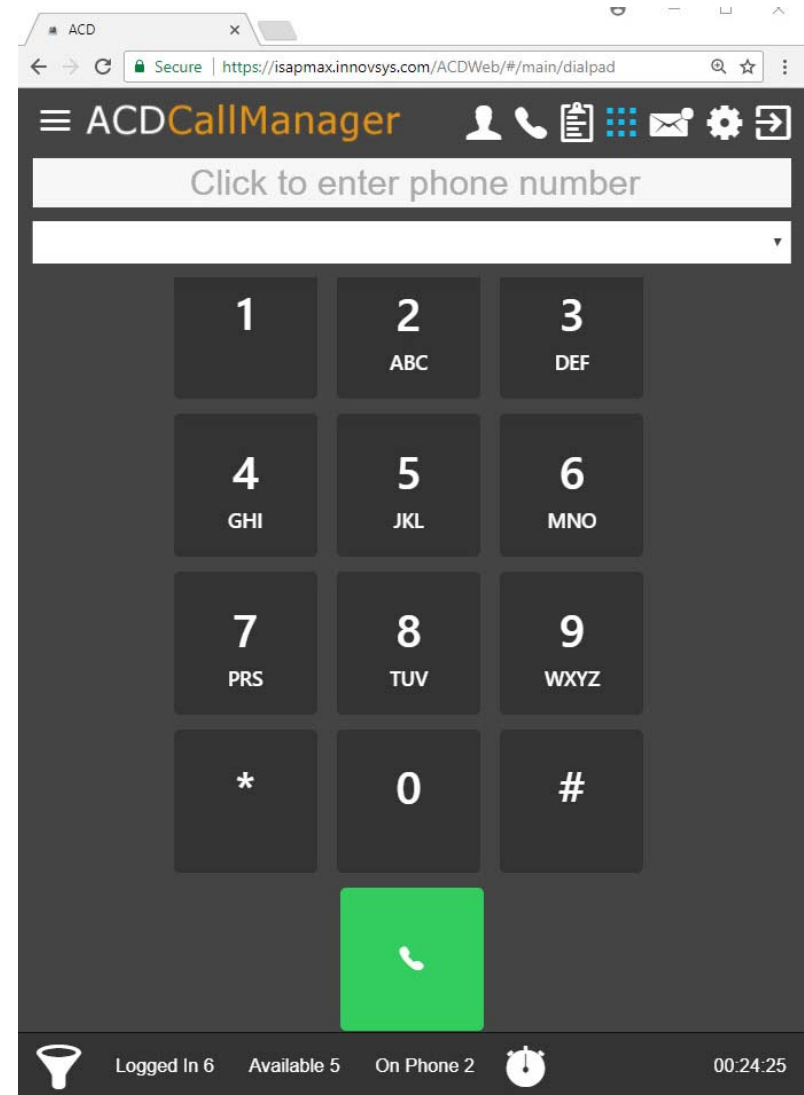
Call Control Menu:

- Logged In 1
- Available 0
- On Phone 1
- 00:02:09
- Mitchell, SD
- 605-999-7438
- Sales Department
- Transfer
- Park
- Pause Recording
- Place on Hold**
- Flag This Call

Outgoing Calls

You can make outbound calls that will be recorded and included in the service reports

-  Click on the Dial Pad icon to open your Dial Pad
- You can use your keyboard to enter a number in the “Click to enter phone number field”, or you can click on the numbers in the Dial Pad.
- Click on the Green Phone icon, your phone will ring, pick up, and the call will be completed.



Outgoing Calls – Direct Dial to Other Agents

- Left click on the three dots next to the agent you want to call and select Direct Dial. Your phone will then ring, pick up and you will be connected to the selected agents phone.

The screenshot displays the ACDCallManager interface. At the top, there is a header with the title 'ACDCallManager' and several icons. Below the header, there is a status dropdown menu currently set to 'Available' and a text input field for a custom status message. The main area contains a list of agents with their names, status, and a 'Direct Dial' button. The 'Direct Dial' button is highlighted for Steve Rice. At the bottom, there is a summary bar showing 'Logged In 5', 'Available 1', 'On Phone 4', and a timer '00:25:42'.

Agent Name	Status	Direct Dial
Sherri Knutson	Available	
Stacie Heesch	(R)On The Phone <i>(2:19 PM) Skyline, Conf Room F</i>	
Steve Rice	Available to Allowed List	Direct Dial
Tate Larson	Away - On Break	
Taylor Hauck	Available to Allowed List ...	
Tom Totton	Available	

Summary: Logged In 5, Available 1, On Phone 4, 00:25:42

Wrap-up – End of Call

After a completed call an End of Call screen will open giving Agents the opportunity to document the Call activity

- At the End of Call an Agent can choose default activity options from the drop down menu.
- Please contact our office if you need to edit your default options.
- Specific Notes on a call can be typed in by the Agent.
- Clicking on Save will close the End of Call window and store the info in the reporting database.
- Choosing No Wrap-up Code will close the End of Call window and reflect the designation in the reporting database
- End of Call will display the amount of time in seconds to complete the Wrap-up. Please contact our office to modify the Wrap-up Code time.

End of Call - 25




Follow-up Required
Resolved

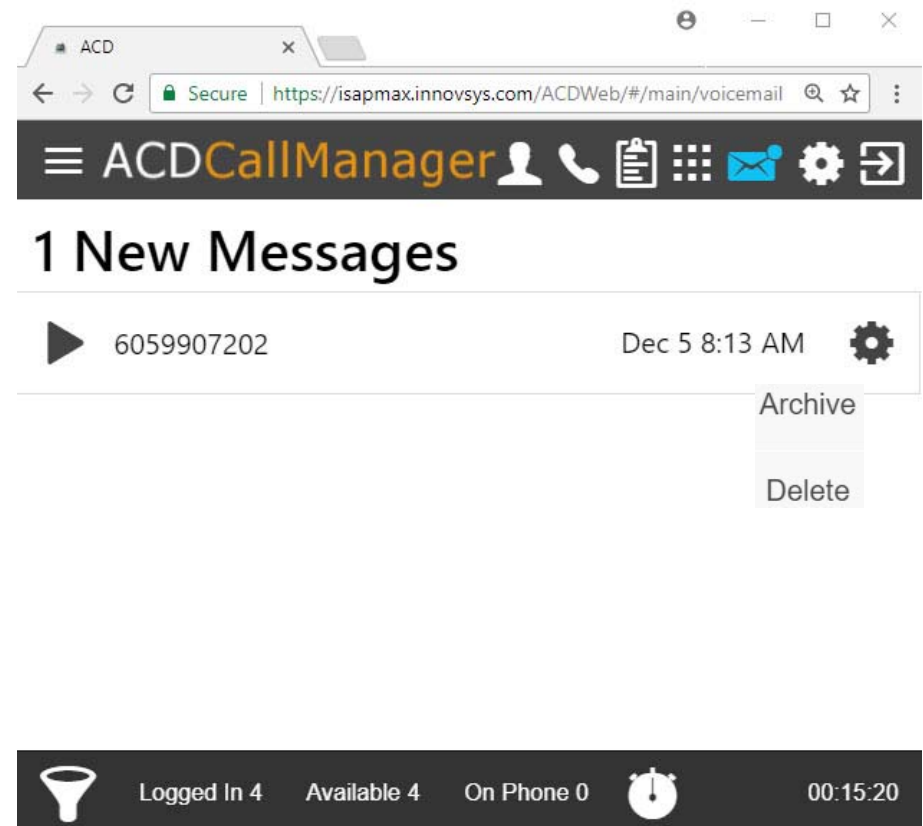
Call back in 10 days

Save

No Wrap-up Code

Voicemail

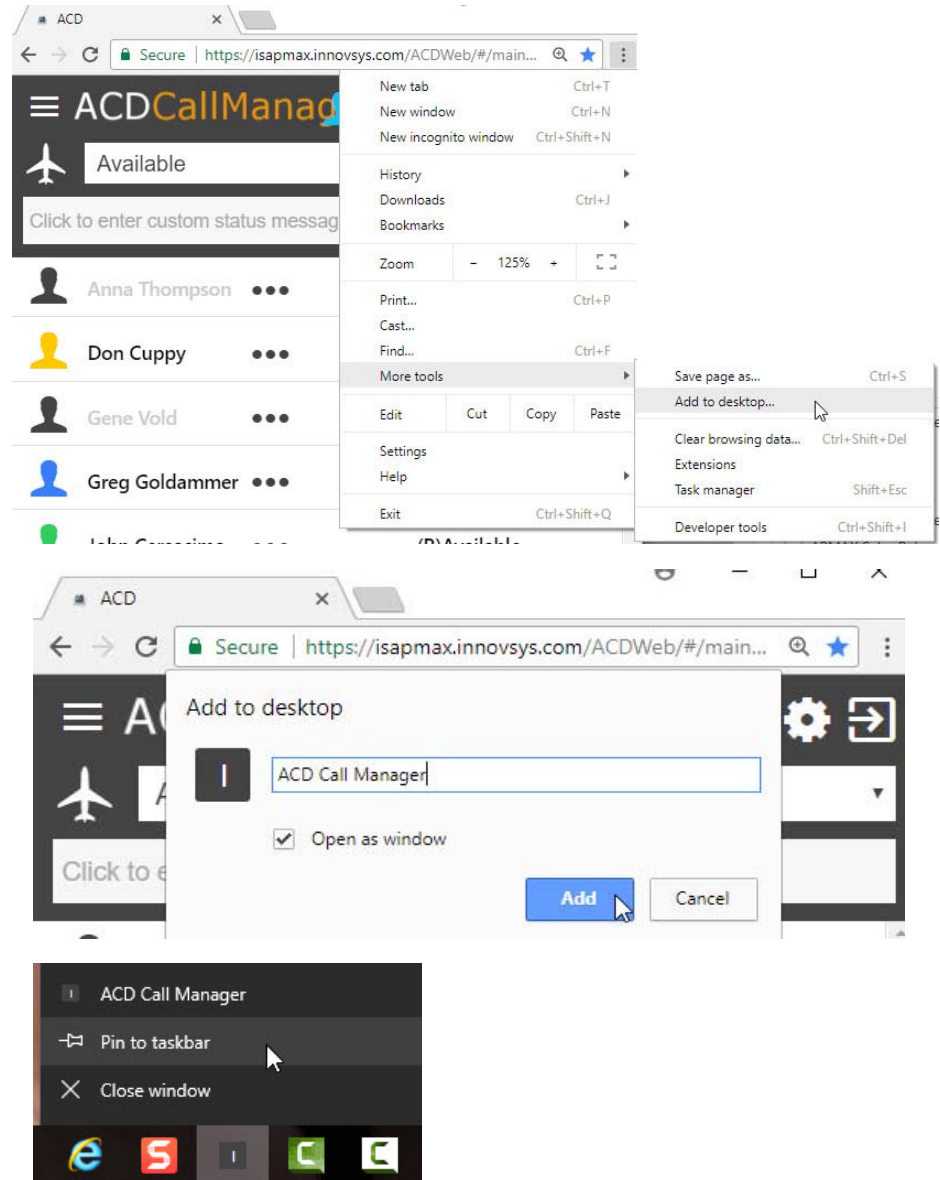
-  Click on the Voicemail Icon in the Menu bar to display your messages. A bubble indicator will be displayed next to the icon showing that you have unread voice messages.
-  Your Department and individual Agent voice messages will be displayed, click the play button next to the number to listen to the message.
-  Click on the Gear icon to manage your voice messages. Archive will save the selected message. Delete will permanently remove the selected message from your voicemail box.



The screenshot shows a web browser window with the URL <https://isapmax.innovsys.com/ACDWeb/#/main/voicemail>. The page title is "ACD Call Manager". The main content area displays "1 New Messages" and a single message from the number 6059907202, dated Dec 5 8:13 AM. A settings gear icon is visible next to the message. A context menu is open over the message, showing "Archive" and "Delete" options. The bottom status bar shows a funnel icon, "Logged In 4", "Available 4", "On Phone 0", a clock icon, and the time "00:15:20".

Creating a Custom Call Manager Icon

- Paste your unique HTML5 Call Manager URL into a Google Chrome Browser bar and then click on your internet options. Select More tools and then choose Add to desktop.
- You can now choose to name this browser location creating it's own special icon. After you select Add, close the ACD Call Manager and reopen it from your desktop.
- After you have reopened your ACD Call Manager, go to your Task bar and right click on the new icon and select Pin to taskbar. This will separate it from your Google Chrome browser button making it easier and quicker to open and manage.



Additional Resources

- The ACD Supervisory Summary Console is a separate URL that monitors Call Center activity and allows users to download any agent recordings for up to the past 28 days. Please contact our office for a copy of the summary guide for this tool.

IS Call Center																	stats	call history
Call Center Statistics 2:00 AM - 1:33 PM																		
	Agent					Call												
	Total	Signed In	Not Available	In Call	Ready	Total	Queue	Internal	Answered	Missed	Voicemail	Agent VM	Queued	Abandoned	Abandoned Q	Wait Time (Avg)	Length (Avg)	
ACS Support Dept	3	3	3	1	0	1	0	0	1	0	0	0	0	0	0	0:00:00	0:02:18	
AP Development Dept	18	2	16	0	2	0	1	0	2	0	0	0	0	0	0	0:00:00	0:01:03	
eLation Development De	33	3	30	0	3	0	0	1	0	0	0	0	0	0	0	0:00:00	0:00:00	
eLation Implementation	7	6	3	0	4	0	0	2	0	0	0	0	0	0	0	0:00:00	0:00:00	
eLation Team 1 Dept	8	7	7	2	1	15	9	2	17	0	1	1	0	0	0	0:00:00	0:11:08	
eLation Team 2 Dept	9	6	8	1	1	22	6	5	32	2	0	4	0	5	0	0:00:00	0:22:11	
eLation Team 3 Dept	9	8	4	1	5	22	5	5	22	1	0	0	0	10	0	0:00:00	0:07:07	
eLation Team 4 Dept	9	8	5	0	4	9	4	2	12	0	0	3	0	0	0	0:00:00	0:07:59	
Financials Support Dept	10	10	4	1	6	23	8	10	30	2	0	1	0	4	0	0:00:00	0:07:47	
IPTV Support Dept	8	5	6	2	2	23	13	3	33	17	2	1	0	6	1	0:00:00	0:13:45	
IT Support Dept	4	3	3	1	1	7	1	7	3	1	2	0	0	3	0	0:00:00	0:05:17	
Management Dept	7	3	4	0	3	0	0	0	0	0	0	0	0	0	0	0:00:00	0:00:00	
Mapping Support Dept	7	5	5	1	2	13	5	0	10	1	0	2	0	4	0	0:00:00	0:13:34	
Sales Department	8	1	7	0	1	0	0	0	3	0	0	0	0	0	0	0:00:00	0:22:23	
SDP Support Dept	8	6	4	1	4	9	1	4	16	0	0	0	0	3	0	0:00:00	0:11:34	
Totals	148	76	109	11	39	144	53	41	181	24	5	12	0	35	1	0:00:00	0:12:25	