## Getting Started

### Select Your Outgoing Call Identity
1. In the Dialer, click **Outbound CLID** .
2. From the drop-down list, select the phone number to display when you are making a call.

*NOTE: Any calls made directly from the physical phone will default to the outbound caller ID associated with that station.*

### Dial Ad Hoc Number
In the Dialer, enter the number to call and click **Dial** .

### Make Emergency Call to Supervisor
While on a call, click the **Emergency** button in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click **EMER** for that supervisor.

### Phone States/Monitor Supervisors
You monitor supervisors using the Supervisors panel located in the Contacts pane. This shows the real-time state of the supervisors who you report to.

The possible phone states when monitoring users are:

- Idle
- Busy
- Ringing
- Do Not Disturb
- Private
- Call Forwarding Always
- Unknown

### Agent Automatic Call Distribution (ACD) States
Your ACD state can be one of the following:

- Available – You are available to receive calls.
- Unavailable – You are not available to receive calls. Based upon settings by your administrator there could be unique unavailable codes.
- Wrap Up – You are wrapping up a call and you are temporarily unavailable to receive calls.

### Change your own ACD State and Set Unavailable Code
1. At the top, right-hand side of the main window, click **ACD** states and then select your new state from the drop-down list.
2. If your administrator has setup specific unavailable codes, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability .

## Assigning Call Codes

### Tag ACD Call with Disposition Codes (if enabled)
More than one disposition code can be assigned to a call.

**To assign disposition codes to a current call:**

1. In the Call Console, click the call.

2. From the list that appears, select a disposition code. The code is applied to the call and sent to the server.

**To assign disposition codes in Wrap-Up:**

1. When in Wrap-Up, click **Disposition Code** in the Call Console header.

2. From the drop-down list that appears, select a code. The code is applied to the last released call.

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2700 Oregon Road  •  Northwood, OH 43619  |  1645 West Chester Pike  •  West Chester, PA 19382  |  1.888.808.6111  |  www.telesystem.us

## Transferring a Call

### Blind Transfer Call

Calls can be blind transferred while active, held, or ringing (in).

1. To transfer the call to an ad hoc number, enter the number in the Dialer and then click **Transfer**.
2. To transfer the call to a contact, click a contact in one of the contact's directories and then click **TXR** for that contact.

### Transfer Call with Consultation

Calls can be transferred while active, held, or ringing (in).

1. Dial the number or contact to transfer the call over to.
2. When the call is answered, speak to the party.
3. From the Call Console, select the original call.
4. Move the mouse over the new call and click **TXR**.

## Escalate Call to Supervisor

### Blind Escalate Call to Supervisor

1. While on a call, click **Escalate**  in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor. The new call appears in the Call Console.
2. In the Call Console, select the original call.
3. Without waiting for the supervisor to answer, move the mouse over the call to the supervisor and then click **TXR**.

### Escalate Call with Consultation

1. While on a call, click **Escalate**  in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the new call and then click **TXR**.

### Escalate Call with Conference or Hand Over

1. While on a call, click **Escalate**  in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the call to the supervisor and click **CONF**. The call appears in the Call Console – Conference panel.
5. To hand over the call to the supervisor, click **LEAVE** in the Conference Call panel. The customer and the supervisor continue their conversation.

### Escalate Call with Mid-Conference Hold

1. While on a call, click **Escalate**  in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the call to the supervisor and then click **CONF**.
5. To put the conference on hold, click **HOLD** in the Conference Call panel header. The other parties continue their conversation and the calls stay in the Conference Call panel.