Using Feature Synchronized Automatic Call Distribution with Polycom® Phones

Feature Profile 57216

Feature synchronized Automatic Call Distribution (ACD) enables organizations to manage a large number of phone calls on an individual basis. ACD enables use of your Polycom® phones in a call center role by automatically directing incoming calls to available persons, or *agents.*

The ACD feature is available on Polycom phones as either a Standard or Premium service.

The Standard ACD service is available on the following Polycom phones:

- SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones running Polycom® UC Software 3.3.1 or later
- VVX® 300/310 and VVX® 400/410 business media phones running UC Software 4.1.4 or later
- VVX® 500 business media phones running UC Software 4.0.1B or later
- VVX® 600 business media phones running UC Software 4.1.2 or later
- VVX® 1500 business media phones running UC Software 5.0.0 or later

The Premium ACD service is available on the following Polycom phones:

- SoundPoint IP 450, 550, 560, 650, and 670 desktop phones running UC Software 3.3.1 or later
- VVX 300/310 and VVX 400/410 business media phones running UC Software 4.1.4 or later
- VVX 500 and VVX 600 business media phones running UC Software 4.1.2 or later
- VVX 1500 business media phones running UC Software 5.0.0 or later

Web Info: Using ACD with Earlier Software Versions

If your phones are running a software version earlier than UC Software 3.3.1, see Technical Bulletin 34787: Using Feature Synchronized Automatic Call Distribution with Polycom SoundPoint IP Phones to find out how to configure ACD for earlier software versions.

ACD handles incoming calls by automatically queuing and directing calls to available agents. The primary benefit of ACD is to reduce customer wait times and improve your organization's quality of service.

The ACD feature requires support from the BroadSoft BroadWorks® R17 Server. Choose from BroadSoft's Standard or Premium service. Each package offers a distinct level of support and functional capabilities that can be customized for the needs of your organization. Learn more about the different capabilities of the BroadWorks® Call Center application by visiting the BroadSoft Web site.

After you enable ACD on your phone, an **ASignIn/ASignOut** soft key displays on the phone's idle screen. Press the **ASignIn** soft key to sign in and start receiving calls. After you sign in as an agent, your status is set to *Available* and incoming calls are directed to your ACD line. When your status is set to *Available*, the **ASignOut** soft key displays. Press this key to sign out. You can change your agent state—sign in, sign

out, and wrap-up—using soft keys or through the phone menus. The ACD state shown on your phone is synchronized with the BroadSoft BroadWorks Server and any ACD computer-based soft clients.

This feature profile explains how to set up and use the feature synchronized ACD feature. The topics include the following:

- Setting Up the Feature Synchronized ACD Feature
- Using the Feature Synchronized ACD Feature
- Using Premium Feature Synchronized ACD Capabilities

Note: Screenshots Shown in This Feature Profile

Screenshots from the SoundPoint IP 450 and IP 650, and the VVX 600 phones are used to show the user interface. The user interface on the VVX 300/310, VVX 400/410, VVX 500, and VVX 1500 phones are similar to those shown for the VVX 600.

Setting Up the Feature Synchronized ACD Feature

When setting up the feature synchronized ACD feature, ensure that each phone has a registered line. Then enable the line with the *Call Center – Standard* or *Call Center – Premium* service on the BroadSoft BroadWorks Server. After you have enabled the ACD feature on the BroadWorks Server, enable the feature synchronized ACD feature on the phone.

Enabling the Feature Synchronized ACD Feature on the BroadWorks Server

This section describes the steps that enable the feature synchronized ACD feature on the BroadWorks Server. On the BroadWorks Server, you must set up a Standard or Premium Call Center.

To enable the Call Center Standard or Premium service on the BroadWorks Server:

1 Log onto the BroadWorks Server.

2 In the Profile Menu, click **Users**.

3 Click **Search** to display all available users.

4 Select the user you wish to enable the Call Center service with.

5 Under *Advanced*, click **Assign Services**.

6 In the *Available Services* box, scroll to *Call Center – Premium* or *Call Center – Standard* and click **Add >**, as shown in Figure 1.

Figure 1: BroadWorks Server Assign Services
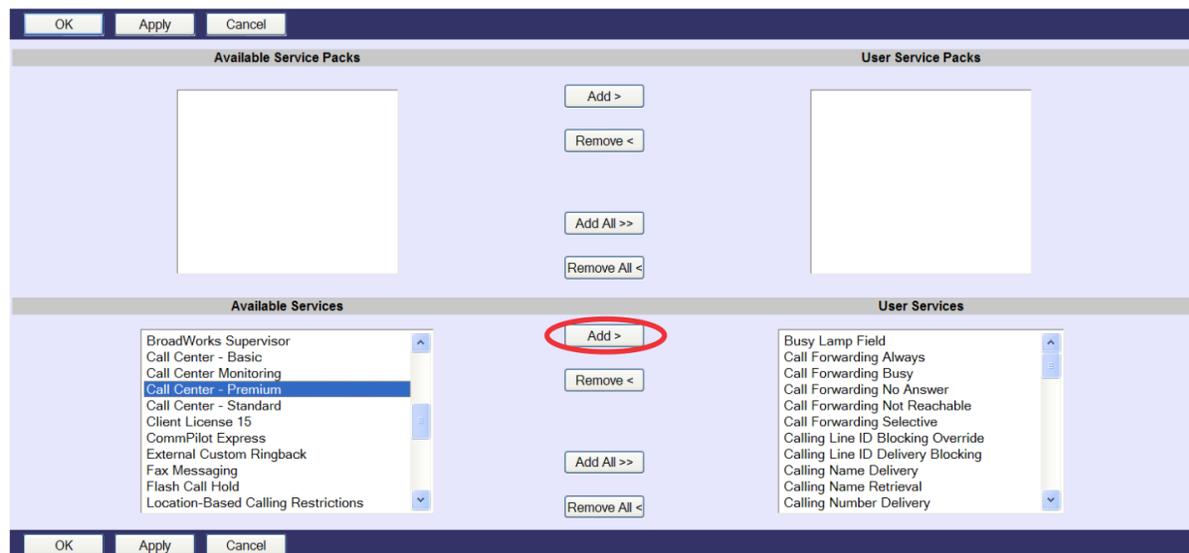
The Call Center feature you select displays in the *User Services* box.

You have successfully set up the feature synchronized ACD feature on the BroadWorks Server.

Next, enable feature synchronized ACD on each phone by editing configuration parameters.

> **Note: Support for ACD on Private Lines Only**
>
> You can configure ACD on a private line only. Configuring ACD on a shared line may result in unexpected phone behavior.

Enabling the Feature Synchronized ACD Feature on the Phone

After you have enabled the ACD feature on the BroadWorks Server, enable the ACD feature on each agent phone.

The configuration parameters are in the **features.cfg** template file, which is included in your UC software download. The following table lists all configuration parameters related to the feature synchronized ACD feature.

Table 1: Configuration Parameters for the Feature Synchronized ACD Feature

Central Provisioning Server... **template** > **parameter**

To turn Feature Synchronized ACD on or off...............................**features.cfg** > feature.acdLoginLogout.enabled

To turn ACD Agent Availability on or off....................................**features.cfg** > feature.acdAgentAvailable.enabled

To turn Premium Feature Synchronized ACD on or off... **features.cfg** > feature.acdPremiumUnavailability.enabled

To turn Feature Synchronized ACD Control URI on or off ..... **features.cfg** > feature.acdServiceControlUri.enabled

To set the registration to use for Feature Synchronized ACD and the users' sign-in state ....**features.cfg** > acd.*

To enable or disable Feature Synchronized ACD....................**sip-interop.cfg** > voIpProt.SIP.acd.signalingMethod

Web Info: Feature Synchronized ACD Configuration Parameters

For a detailed description of these parameters, see the latest Polycom UC Software Administrators' Guide on the Polycom Support Web site.

Using the Feature Synchronized ACD Feature

Using Standard feature synchronized ACD, you can do the following:

- Sign in or sign out as an agent
- Change your agent state to unavailable or available using the phone's soft keys or menu

Using Premium feature synchronized ACD, you can do the following:

- Sign in or sign out as an agent
- Change your agent state to unavailable or available using the phone's soft keys or menu
- View incoming call center information
- Select a reason code for agent unavailability
- Transfer call information to a supervisor

When ACD is enabled on your phone, your phone's idle screen displays the **ASignIn** soft key and your ACD line has a new icon on the line key label, as shown in Figure 2 and Figure 3.

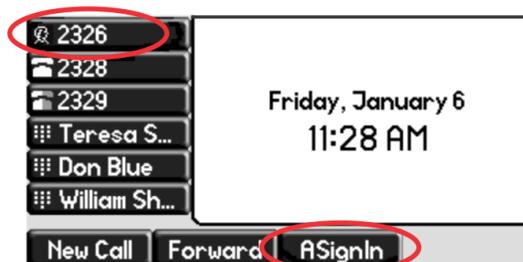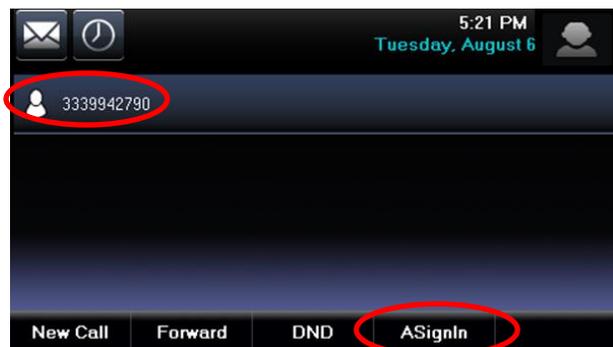**Figure 2: SoundPoint IP 650 Phone's Main Screen with Sign In Soft Key**

Figure 3: VVX 600 Phone's Main Screen with Sign In Soft Key

The icon on the line label represents your agent state. Use Table 2: Understanding the Agent States to match an agent state to its corresponding line icon.

Table 2: Understanding the Agent States

| Agent State	Line Icon for SoundPoint IP	Line Icon for VVX 300/310	Line Icon for VVX 400/410, VVX 500, VVX 600, VVX 1500	Description
Sign Out				Indicates an agent is not using the ACD feature. Calls will not be directed to the agent.
Sign In, Available				Indicates an agent is available to take calls. Calls will be directed to the agent.
Sign In, Unavailable	Alternating and ✕			Indicates an agent is unavailable to take calls. Calls will not be directed to the agent.
Wrap-up				Indicates an agent has just finished a call and is doing post-call work. Calls will not be directed to the agent.

Setting the Initial Agent State

When you sign in, your agent state is automatically set to an initial state. By default, the initial state is *Available*. You can also set the initial state using the phone menu.

To set the initial agent state:

1 Press or tap **Menu** > **Features** > **ACD** > **Initial ACD State**.

The Initial ACD State menu displays, as shown in Figure 4.

Figure 4: Initial ACD State Screen on a VVX 600 Phone
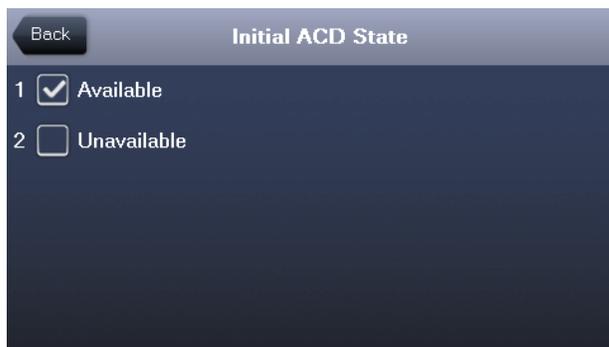
2 Scroll to the desired initial state and press or tap the **Select** soft key.

The next time you sign in, your initial state will be the state you selected.

Signing In or Out as an Agent

To sign in or sign out of the ACD feature, use the soft keys or the phone menu.

To sign in using soft keys:

- From the main screen on a SoundPoint IP phone or the Lines view of a VVX phone, press or tap **SignIn**.

  ➢ If your initial agent state is *Available*, an idle screen similar to that shown in Figure 5 or Figure 6 displays.

Figure 5: SoundPoint IP 450 Phone's Main Screen after Available User Signed In

**Figure 6: VVX 600 Phone's Main Screen after Available User Signed In**
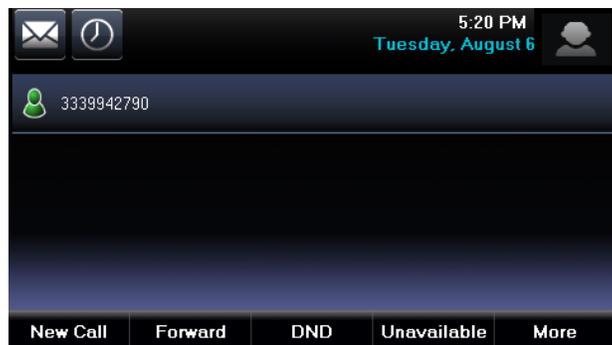
In Figure 5, the line key labeled 1601 is enabled with ACD. The line icon changes to the icon and the **ASignOut** and **Unavail.** soft keys display. If Premium ACD is enabled, a **More** soft key displays instead of the **ASignOut** soft key. The *Agent State: Available* message displays in the status bar and calls are directed to your phone on the line associated with the icon.

> If your initial agent state is *Unavailable*, an idle screen similar to that shown in Figure 7 or Figure 8 displays.

Figure 7: SoundPoint IP 450 Phone's Main Screen after Unavailable User Signed In

Figure 8: VVX 600 Phone's Main Screen after Unavailable User Signed In
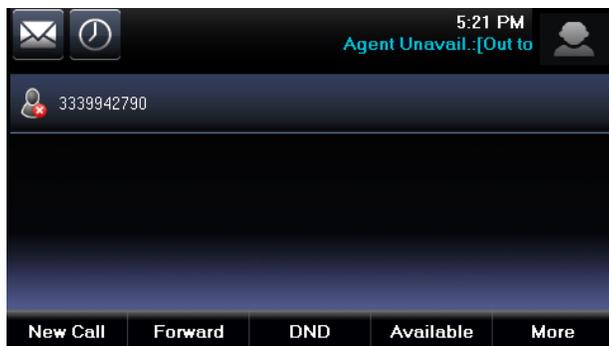
On the SoundPoint IP phones, the line icon changes to alternating and and the **Avail.** soft key displays. The *Agent State: Unavailable* message displays in the status bar and calls are not directed to your phone.
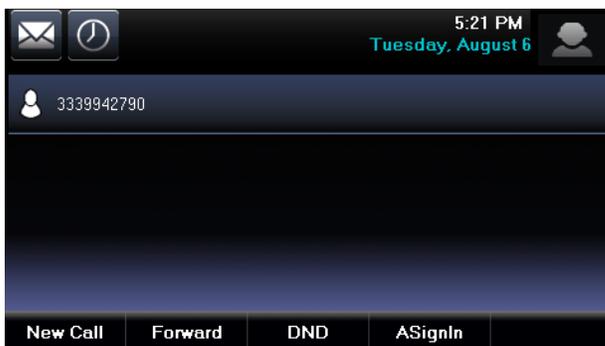
To sign in using the phone menu:

1 Press or tap **Menu** > **Features** > **ACD** > **ACD SignIn/SignOut**.

2 Scroll to **Agent SignIn** and press or tap the **Select** soft key.

To sign out using soft keys:

» Press or tap the **ASignOut** soft key.

An idle screen similar to that shown in Figure 9 or Figure 10 displays.

Figure 9: SoundPoint IP 450 Phone's Main Screen after User Signed Out

Figure 10: VVX 600 Phone's Main Screen after User Signed Out

On the SoundPoint IP phones, the line icon changes to ![icon] and an **ASignIn** soft key displays again. No agent state message scrolls in the status bar and calls are no longer directed to your phone.

To sign out using the phone menu:

  1 Press or tap **Menu** > **Features** > **ACD** > **ACD SignIn/SignOut**.

  2 Scroll to **Agent SignOut** and press or tap the **Select** soft key.

Changing the Agent State

To change the agent state, use the soft keys or the phone menu. You can also change the agent state through a third party, for example, a computer-based soft client. At the end of a call, the call server puts your phone in a wrap-up state, which makes you unavailable and enables you to do any necessary post-call work. (The time period is configurable from the BroadWorks Call Server.) To reset your status to available, press or tap the **Avail.** soft key.

To change the agent state using soft keys when the phone is idle:

- Do one of the following:
  - ➤ Press the **Unavail.** soft key.

    If you are directed to enter a reason code, see Selecting Reason Codes for Unavailability.

    On the SoundPoint IP phones, the ACD line icon begins alternating between the ![icon] and ✖ icons and the **Avail.** soft key displays. The *Agent State: Unavailable* message also displays in the status bar.

  - ➤ Press the **Avail.** soft key.

On the SoundPoint IP phones , the line icon changes to ![icon] and the **Unavail.** soft key displays. The *Agent Available* message also displays in the status bar.

To change the agent state using the phone menu when the phone is idle:

1   Press or tap **Menu** > **Features** > **ACD** > **ACD Agent State**.

The ACD Agent State menu displays, as shown in Figure 11.

Figure 11: ACD Agent State Screen on a VVX 600 Phone

2   Scroll to the desired state and press **Select** or tap the menu item.

You can select from **SignIn**, **Unavailable**, **Unavailable**, **Wrap-Up**, and **SignOut**.

If you select **Unavailable** and are directed to enter a reason code, see Selecting Reason Codes for Unavailability.

Using Premium Feature Synchronized ACD Capabilities

Premium feature synchronized ACD supports the following:

- Display of incoming call center information
- Selection of a reason code for agent unavailability
- Transfer of call information to a supervisor

Note: Enhancements to the Premium ACD Service

As of UC Software 4.0.2, Polycom has made two enhancements—Hoteling and Queue Status Notification—to the Premium ACD service available on Polycom phones. The enhancements apply to the SoundPoint IP 450, 550, 560, 650, and 670 phones running UC Software 4.0.2 or later, VVX 300/310 and 400/410 phones running UC Software 4.1.4 or later, VVX 500 and 600 phones running UC Software 4.1.2 or later, and VVX 1500 phones running UC Software 5.0.0 or later.

Web Info: Hoteling and Feature Synchronized ACD

If you want to introduce Hoteling on your phones, see Feature Profile 76179: Using Premium Automatic Distribution for Call Centers on the Polycom Profiled UC Software Features Support Web page.

Viewing Incoming Call Center Information

When an incoming call is directed to your phone on your ACD line, the screen displays the incoming call center information for 30 seconds, as shown in Figure 12.

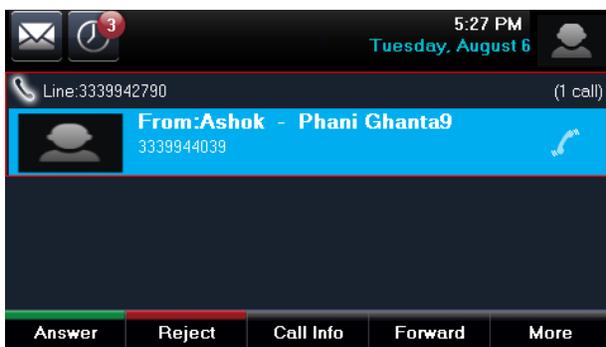**Figure 12: Incoming Call Center Information on a SoundPoint IP 450 Phone**

After 30 seconds, the incoming call center information disappears, and the incoming call window displays. To leave the screen, press or tap the **Exit** soft key.

Figure 13: Incoming Call Display on a SoundPoint IP 450 Phone

Figure 14: Incoming Call Display on a VVX 600 Phone

To view the incoming call center information again, while in the call or after the call ends, press the **Call Info** soft key.

Selecting Reason Codes for Unavailability

If you are going to be unavailable for a period of time and will be unable to answer calls, select a reason code to inform others about your unavailability.

To select a reason code:

   1 Press or tap the **Unavail.** soft key.

      A screen similar to that shown in Figure 15 displays.

      Figure 15: Reason Code Entry Screen on a SoundPoint IP 650 Phone
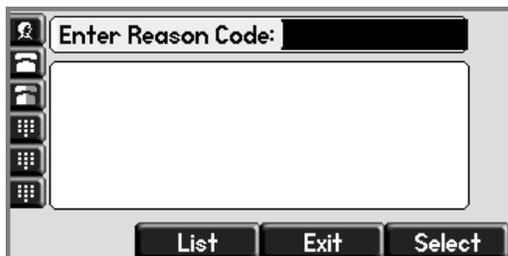
   2 Do one of the following:

      ➢ Enter a reason code. For example, **10002**.

         A screen similar to that shown in Figure 16 or Figure 17 displays.

         Figure 16: Reason Code Details Screen on a SoundPoint IP 650 Phone

         Figure 17: Reason Code Details Screen on a VVX 600 Phone

         A reason code can be up to 10 characters. As you enter the code, the closest matching reasons display in the text box. Press the **Select** soft key or tap your desired reason code.

      ➢ Press or tap the **List** soft key.

A screen similar to that shown in Figure 18 or Figure 19 displays.

Figure 18: Unavailable Reason Code Selection Screen on a SoundPoint IP 650 Phone
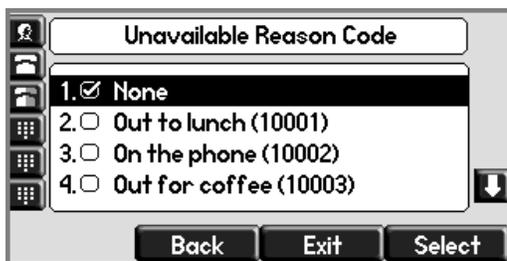
Figure 19: Unavailable Reason Code Selection Screen on a VVX 600 Phone

Scroll to your desired reason code—for example, **On the phone (10002)**—and press the **Select** soft key or tap your desired reason code.

For either option above, the *Agent Unavailable* message, appended with the selected reason code, displays in the status bar.

Figure 20: SoundPoint IP 450 Phone's Main Screen with Unavailable Reason Code Displayed

Figure 21: VVX 600 Phone's Main Screen with Unavailable Reason Code Displayed
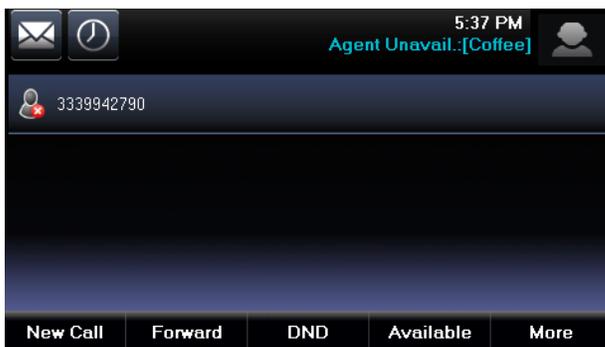
Note: Reason Codes Defined on the BroadWorks Server

The unavailable reason codes must be defined on the BroadWorks Server, or they will not appear in the scrolling status message on the phones.

Transferring Call Information to a Supervisor

In certain circumstances, you may want to send call-specific information—such as a call center disposition code or a customer-originated trace—to your call center manager during a call or immediately afterwards. After you complete a call, press or tap the **More** soft key to display the **Disp Code** and **Trace** soft keys, as shown in Figure 22 and Figure 23.

Figure 22: SoundPoint IP 450 Phone's Main Screen with Disp Code and Trace Soft Keys

Figure 23: VVX 600 Phone's Main Screen with Disp Code and Trace Soft Keys
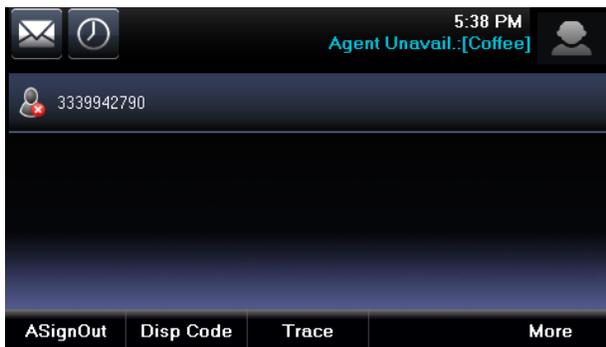
If you need to escalate certain calls to your supervisor, for example, when a screen similar to that shown in Figure 24 displays while you are in a call, press or tap the **Escalate** soft key.

Figure 24: Active Call For Available Agent Screen on a SoundPoint IP 450 Phone

Applying a Call Center Disposition Code

You can apply disposition codes to certain calls to tag them for later reference. The caller is not put on hold or signaled in any way.

To enter a disposition code during an active call or in call wrap-up:

1 Press the **Disp Code** soft key.

A screen similar to that shown in Figure 25 displays.

Figure 25: Disposition Code Entry Screen on a VVX 600 Phone

2 Enter a disposition code. For example, **10**.

3 Press or tap the **Enter** soft key.

If you are in a call, the disposition code applies to your current call. If you are in the wrap-up state, the disposition code applies to your most recently answered call.

Applying a Customer-Originated Trace

You can issue a customer-originated trace—call trace for an obscene, harassing, or threatening call—on any answered call. The caller is not put on hold. If you press or tap the **Trace** soft key outside of a call, the last incoming call is traced.

To issue a trace during a call or in a call wrap-up:

» Press or tap the **Trace** soft key.

A screen similar to that shown in Figure 26 or Figure 27 displays.

Figure 26: Customer-Originated Trace Screen on a SoundPoint IP 450 Phone

Figure 27: Customer-Originated Trace Screen on a VVX 600 Phone
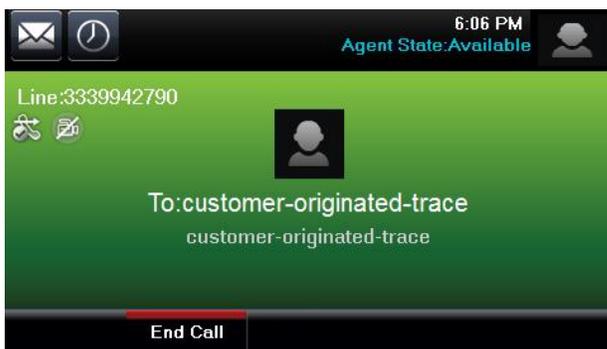
If the name or number of the caller is available to the BroadWorks Server, a trace is sent and an announcement plays on your phone followed by a dial tone.
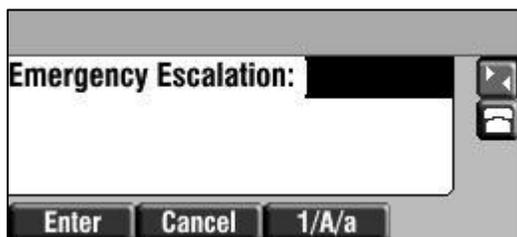
Applying an Emergency Escalation

You can emergency escalate a call to an available supervisor.

To escalate a call:

1   Press or tap the **Escalate** soft key.

A screen similar to that shown in Figure 28 displays.

Figure 28: Emergency Escalation Screen on a Sound Point IP 450 Phone

2   Do one of the following:

  ➢ Enter a supervisor number. For example, **54321**.

  ➢ Leave the field blank.

3 Press or tap the **Enter** soft key.

If you supplied a supervisor number and that supervisor is available, the supervisor is alerted by the ACD feature.

If you did not supply a supervisor number or the supervisor whose number you entered is unavailable, another available supervisor is alerted.

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