

Using Feature Synchronized Automatic Call Distribution with Polycom® Phones

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*.

Feature-synchronized ACD is available on SoundPoint IP phones running UC Software 3.3.1 or later and Polycom VVX® 500 business media phones running UCS 4.0.1 or later.



Web Info: Using ACD with Earlier Software Versions

If your phones are running a software version earlier than UCS 3.3.1, see [Technical Bulletin 34787](#) to find out how to configure ACD for earlier software versions.

ACD handles incoming calls by automatically queuing and directing calls to available personnel. 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 platform. You can 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. You can learn more about the different capabilities of Broadsoft's Call Center application by visiting the [BroadSoft](#) Web site.

Once you enable ACD on your phone, an **ASignIn/ ASignOut** soft key will display on each phone's idle screen. When you press the **ASignIn** soft key, a Sign In menu displays, enabling you to log in and start receiving calls. Once you are signed in as an Agent, your status is set to *Available*, and incoming calls will be directed to your ACD line. When your status is set to *Available*, the **ASignOut** soft key displays and you can 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 BroadWorks platform and any ACD computer-based soft clients.

See the following table for a summary of compatible phones, limitations, and available documentation.

Table 1: Feature Synchronized Automatic Call Distribution at a Glance

Released:	October 2010 January 2012	Dependencies:	Requires BroadWorks R17; ACD must be configured on the phone
Applies to models:	SoundPoint IP 320, 321, 330, 331, 335, 450, 550, 560, 650, 670; VVX 500	Security issues:	Users will need login credentials
Applicable UC Software version(s):	UC Software 3.3.1 and later; UC Software 4.0.2 and later	Limitations:	Phones support the Standard and Premium packages ; Only works for private lines
Main business size:	Enterprise	Maintenance:	One time setup
Primary users:	Call centers	Available Documentation:	Polycom UC Software Administrators' Guide
Required Licenses:	No	Resources Required:	XML editor; administrator access to BroadWorks

Setting up the Feature Synchronized ACD Feature

When setting up the feature synchronized ACD feature, administrators will need to ensure that each phone has a registered line and enable the line with the *Call Center – Standard* or *Call Center – Premium* service on the BroadSoft BroadWorks platform. Next, you will need to enable the feature synchronized ACD feature on the phone.

Enabling the Feature Synchronized ACD Feature on the BroadWorks Server

This section takes you through the steps that enable the feature synchronized ACD feature on the BroadWorks Server. On the BroadWorks Server, you will need to set up a Standard and Premium Call Center.

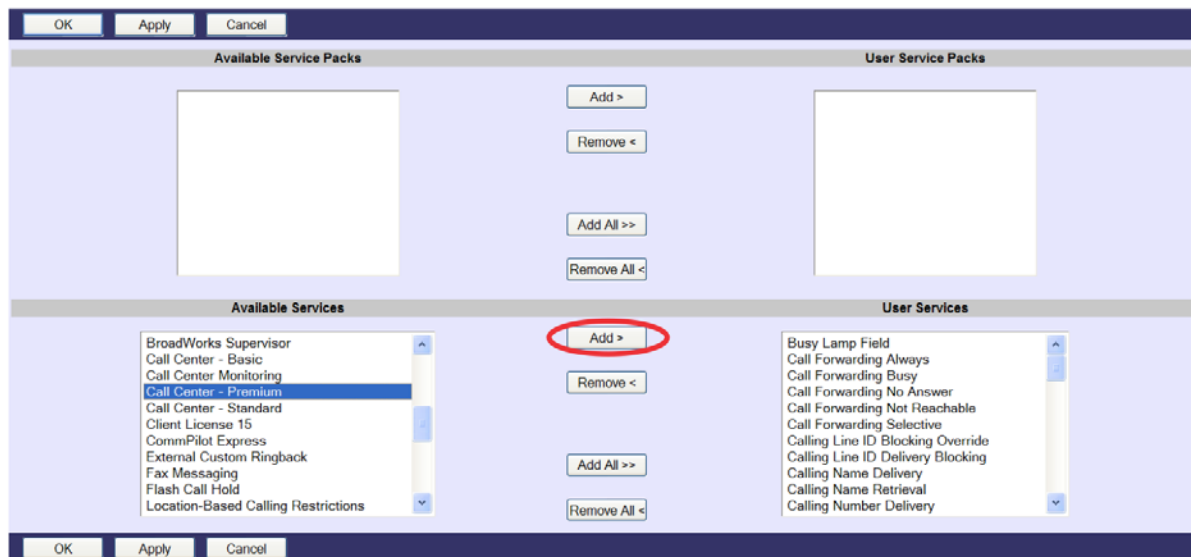
To enable the Call Center Standard or Premium service using the BroadWorks platform:

- 1** Log onto the BroadWorks platform.
- 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 next.

Assign Services

Assign Services allows you to assign or unassign services and service packs for a user. If a service or service pack is unassigned the service data that has been filled out will be lost.



The screenshot shows the 'Assign Services' dialog box. It has a title bar with 'OK', 'Apply', and 'Cancel' buttons. Below the title bar, there are two main sections: 'Available Service Packs' and 'User Service Packs'. Each section has an empty box and buttons for 'Add >', 'Remove <', 'Add All >>', and 'Remove All <<'. Below these sections, there are two lists: 'Available Services' and 'User Services'. The 'Available Services' list contains items like 'BroadWorks Supervisor', 'Call Center - Basic', 'Call Center Monitoring', 'Call Center - Premium' (which is selected), 'Call Center - Standard', 'Client License 15', 'CommPilot Express', 'External Custom Ringback', 'Fax Messaging', 'Flash Call Hold', and 'Location-Based Calling Restrictions'. The 'User Services' list contains items like 'Busy Lamp Field', 'Call Forwarding Always', 'Call Forwarding Busy', 'Call Forwarding No Answer', 'Call Forwarding Not Reachable', 'Call Forwarding Selective', 'Calling Line ID Blocking Override', 'Calling Line ID Delivery Blocking', 'Calling Name Delivery', 'Calling Name Retrieval', and 'Calling Number Delivery'. Between the two lists, there are buttons for 'Add >', 'Remove <', 'Add All >>', and 'Remove All <<'. The 'Add >' button is circled in red.

The Call Center feature you selected displays in the *User Services* box.

You've successfully setup the feature synchronized ACD feature on the BroadWorks platform.

Next, you will need to enable feature synchronized ACD on each phone by editing configuration parameters.



Note: ACD Applies to Private Lines

You can configure ACD only on a private line. Configuring ACD on a shared line may result in unexpected phone behavior.

Enabling the Feature Synchronized ACD Feature on the Phone

After you've enabled the ACD feature on the BroadWork Server, you'll need to enable the ACD feature on each agent phone.

You can locate the configuration parameters to edit in the **features.cfg** template file, which is included in your UC Software download. The following table describes all configuration parameters related to the feature synchronized ACD feature.

**Table 2: 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 be used for Feature Synchronized ACD and the users' sign-in state	features.cfg > acd.*
To enable or disable Feature Synchronized ACD.....	sip-interop.cfg > volpProt.SIP.acd.signalingMethod



Web Info: Feature Synchronized ACD Configuration Parameters

For a detailed description of these parameters, see the [Polycom UC Software Administrators' Guide](#) on the Polycom Support Web site.

Using the Feature Synchronized Automatic Call Distribution Feature

If you are using standard feature-synchronized ACD, you will be able to:

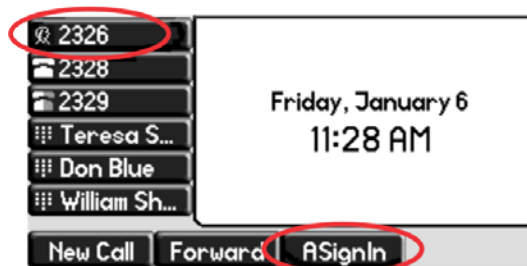
- Sign in and sign out as an agent
- Change your agent state to unavailable or available using the phone's soft keys or menu

If you are using premium feature synchronized ACD, you will be able to:

- Sign in and sign out as an agent
- Change your agent state to unavailable or available using the phone's soft keys or menu
- View incoming call information
- Select a reason code for agent unavailability
- Invoke call center service controls on the enhanced Application Server










Screens from the SoundPoint IP 450 and 650 and the VVX 500 show the user interface of the feature-synchronized ACD.

When ACD is enabled on your phone, your phone’s idle screen will display a new **ASignIn** soft key and your ACD line will have a new icon on the line key label, as shown next.



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 3: Understanding the Agent States

Agent States	Line Icons	Description of the Agent State
Sign Out	 or 	Indicates an Agent is not using the ACD feature. Calls will not be directed to the Agent.
Sign In, Available	 or 	Indicates an Agent is available to take calls. Calls will be directed to the Agent.
Sign In, Unavailable	Alternating  and  or 	Indicates an Agent is unavailable to take calls. Calls will not be directed to the Agent.
Wrap-up	 or 	Indicates an Agent has just finished a call and is doing post-call work. Calls will not be directed to the Agent.

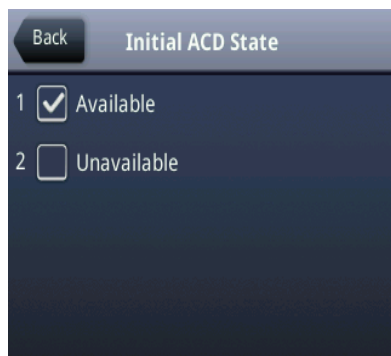
Setting the Initial Agent State

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 **Menu > Features > ACD > Initial ACD State**.

The Initial ACD State menu will display, as shown next.



- 2 Scroll to the desired initial state and press the **Select** soft key.

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



Signing In and Out as an Agent

You can sign in and sign out of the ACD feature using the soft keys or the phone menu.

To sign in using soft keys:



- 1 Press **ASignIn**.
 - a If your initial agent state is **Available**, an idle screen similar to the one shown next will display.



In this illustration, the line key labeled 1601 is enabled with ACD. The line icon changes to the  icon and the **ASignOut** and **Unavail.** soft keys will display. If Premium ACD is enabled, a **More** soft key will display instead of the **ASignOut** soft key. The *Agent State: Available* message displays in the status bar and calls will be directed to your phone on the line associated with the  icon.

- b** If your initial agent state is **Unavailable**, an idle screen similar to the one shown next will display.



The line icon changes to alternating  and  and the **Avail.** soft key will display. The *Agent State: Unavailable* message displays in the status bar and calls will not be directed to your phone.

To sign in using the phone menu:


- 1 Press **Menu** > **Features** > **ACD** > **ACD SignIn/SignOut**
- 2 Scroll to **Agent SignIn** and press the **Select** soft key.

To sign out using soft keys:

- 1 Press the **ASignOut** soft key.

An idle screen similar to the one shown next will display.



The line icon changes to  and an **ASignIn** soft key will display again. No agent state message will scroll in the status bar and calls will no longer be directed to your phone.

To sign out using the phone menu:

- 1 Press **Menu** > **Features** > **ACD** > **ACD SignIn/SignOut**.
- 2 Scroll to **Agent SignOut** and press the **Select** soft key.

Changing the Agent State

You can change the Agent state using soft keys or the phone menu. The Agent state can also be changed through a third party, a computer-based soft client for example. At the end of a call, the call server will

put your phone into a Wrap-up state, which makes you unavailable for calls for a set period of time so you can do any necessary post-call work. (The time period is configurable from the BroadWorks call server.) You can change your status to *Available* if you are ready for more calls by pressing the **Avail** soft key.

To change the agent state to *Unavailable* while your phone is ringing, you may do one of the following to ignore the call and silence the ringing:

- Press the **Reject** soft key.
- Press the **DND** key (or select **Do Not Disturb** from the Feature menu).
- Wait for the ringing to stop.



In all cases, the call will be returned to the queue for the next available agent.

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


- 1 Do one of the following:

- a Press the **Unavail.** soft key.

If you are directed to enter a reason code, see [Selecting Reason Codes for Unavailability](#).

The ACD line icon begins alternating between the  and  icons and the **Avail.** soft key displays. The *Agent State: Unavailable* message also displays in the status bar.

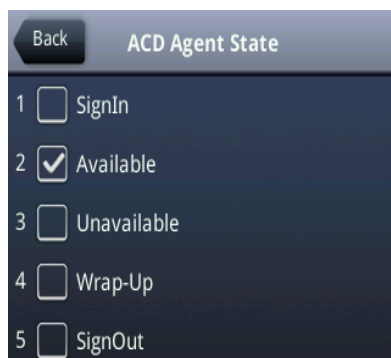
- b Press the **Avail.** soft key.

The line icon changes to  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 **Menu > Features > ACD > ACD Agent State**.

The ACD Agent State menu will display as shown next.



- 2 Scroll to the desired state and press **Select**.

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](#).

Premium Feature Synchronized Automatic Call Distribution Capabilities

As of Polycom UC Software 3.3.1, the premium feature synchronized ACD feature supports:

- Display of incoming call information
- Selection of a reason code for agent unavailability
- Invocation of servers on the Application server

The premium feature synchronized ACD feature is supported on the SoundPoint IP 450, 550, 560, 650, and 670 desktop phones. As of UC Software 4.0.2, the premium feature synchronized ACD feature is supported on the VVX 500 business media phone.



Web Info: Hoteling and Feature Synchronized ACD

As of Polycom UC Software 4.0.2, Polycom has made two enhancements to the Premium ACD service available on certain Polycom phones. The hoteling and queue status notification enhancements apply to the SoundPoint IP 450, 550, 560, 650, and 670 desktop phones only. If you want to introduce Hoteling on your phones, see [Feature Profile 76179: Using Premium Automatic Distribution for Call Centers](#) on [Polycom Profiled UC Software Features](#) on the Support Web site.

Viewing Incoming Call Information

When an incoming call is directed to your phone on your ACD line, a screen similar to the one shown next will display the incoming call information for 30 seconds.



After 30 seconds, the incoming call information disappears and the incoming call window displays. You can also leave the screen by pressing the **Exit** soft key.



You can view the incoming call information again, while in the call or after the call ends, by pressing the **Call Info** soft key.

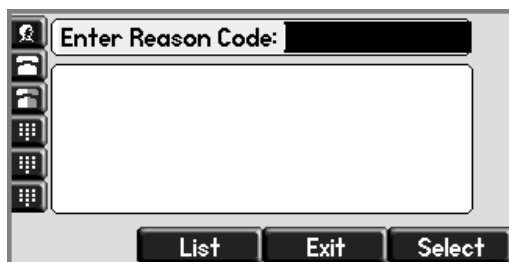
Selecting Reason Codes for Unavailability

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

To select a reason code:

- 1 Press the **Unavail.** soft key.

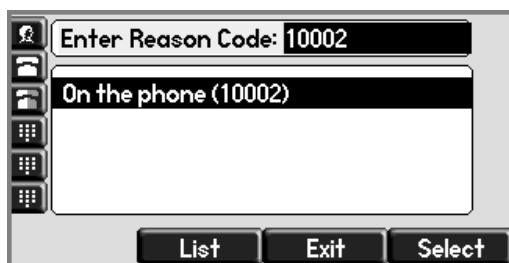
A screen similar to one shown next will display.



- 2 Do one of the following:

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

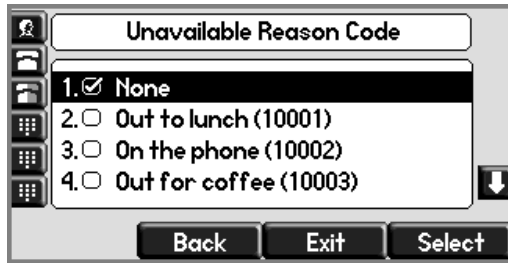
A screen similar to the one shown next will display.



A reason code can be up to 10 characters. As you enter the code, the closest matching reason(s) will display in the text box. Press the **Select** soft key when your desired reason code displays.

- b Press the **List** soft key.

A screen similar to the one shown next will display.



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

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

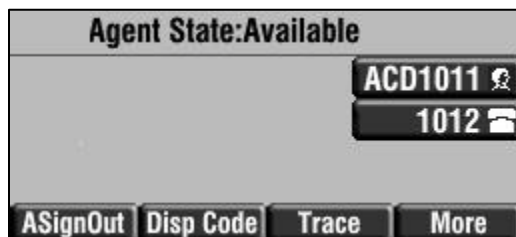


Note: Reason Codes Defined in BroadWorks Server

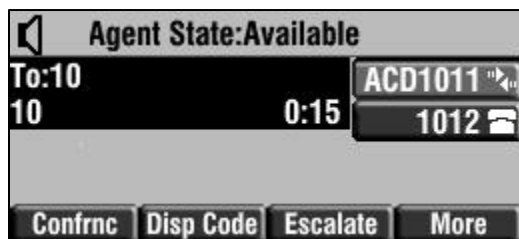
The unavailable reason codes shown in the screenshot above must be defined on the BroadWorks server, or they will not appear in the scrolling status message on the phones.

Invoke Call Center Service Controls on the Application Server

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, you can press the **More** soft key to display the **Disp Code** and **Trace** soft keys, as shown next.



For certain calls, you may need to escalate to your supervisor. For example, a screen similar to the one shown next displays while you are in a call:



Press the **Escalate** soft key to escalate this call to your supervisor.

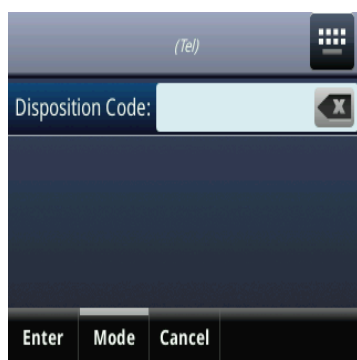
Call Center Disposition Code

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 one shown next will display.



- 2 Enter a disposition code. For example, **10**.
- 3 Press the **Enter** soft key.

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

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 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:

- 1 Press the **Trace** soft key.

A screen similar to the one shown next will display.



If the name or number of the caller is available to BroadWorks, a trace is sent and an announcement is played on your phone followed by a dial tone.

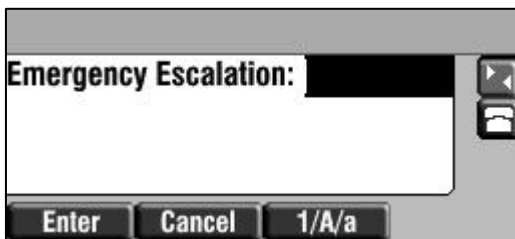
Emergency Escalation

You can escalate a call to an available supervisor.

To escalate a call:

- 1 Press the **Escalate** soft key.

A screen similar to the one shown next will display.



- 2 Do one of the following:
 - a Enter a supervisor number. For example, **54321**.
 - b Leave the field blank.

- 3 Press the **Enter** soft key.

If you supplied a supervisor number and that supervisor is available, the supervisor will be 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 will be alerted.

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