



Meridian 1, Succession 1000, Succession 1000M
Succession 3.0 Software

i2004 Internet Telephone Call Center User Guide



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i2004 Internet Telephone

The i2004 Internet Telephone brings voice and data to the desktop. The i2004 Internet Telephone connects directly to the LAN through the Ethernet connection. This document describes the i2004 features and how to use the i2004 Internet Telephone in a call center environment.

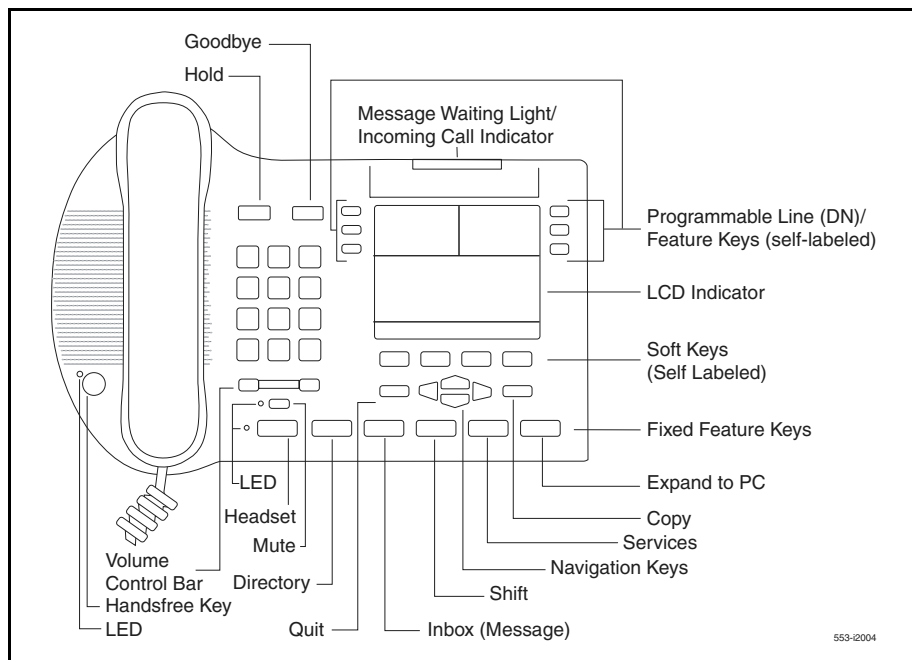
Note: Not all features are available on all telephones. Consult your network administrator to verify the features that are available on your telephone.

Note: In this guide, Programmable Line (DN)/Feature Keys (self-labeled) display beside the label. Soft Feature (self-labeled) keys display directly below the label.

i2004 Internet Telephone features

The i2004 Internet Telephone supports the following features:

- Twelve programmable feature keys: six (physical) Programmable Line (DN)/ Feature Keys (self-labeled) and six lines/features accessed by pressing the shift key
- Four Soft Keys (self-labeled) providing access to a maximum of ten features
- Large multi-field LCD display
- Shared LAN access with a PC through a 3-Port integrated switch
- Wideband-compatible speakerphone
- Headset jack with On/Off key
- Volume control bar for adjusting ringer, speaker, handset, and headset
- Six specialized fixed keys:
 - Headset
 - Directory
 - Inbox (Message)
 - Shift
 - Services
 - Expand to PC
- Call processing fixed keys:
 - Hold
 - Goodbye
 - Handsfree
 - Mute
- Automatic IP address
- Hearing-aid compatibility



553-2004

Your Internet Telephone's controls



Use the **Volume Control** to adjust the volume of the Handset, Headset, Speaker, Ringer, and Handsfree features. Press the right side of the rocker bar to increase volume, the left side to decrease volume.



Press the **Goodbye** key to terminate an active call.



Press the **Headset** key to answer a call using the headset or to switch a call from the handset or handsfree to the headset.

2498



A steady LCD beside a **Line** (DN) key indicates feature or line is active. A flashing LCD indicates line is on hold or the feature is being programmed.



Press the **Hold** key, to put an active call on hold. Press the **Line** (DN) key beside the flashing indicator, to return to the caller on hold.



Press the **Speaker** key to activate handsfree. The speaker LED lights to indicate when handsfree is active.



The **Expand to PC** key is used to access external server applications such as Net6.



Press the **Inbox (Message)** key to access your voice mailbox.

Note: On the 3900 telephone series, the **Messages** key corresponds to the **Inbox (Message)** key.



Press the **Shift** key to toggle between two feature key pages and access an additional six lines/features.



Press the **Directory** key to access directory services.



Press the **Mute** key to listen to the receiving party without transmitting. Press the **Mute** key again to return to a two-way conversation. The **Mute** key applies to Handsfree, Handset, and Headset microphones. The **Mute** LED indicator flashes when the Mute option is in use.



The **Navigation** keys enable you to scroll through menus and lists in the display area.



Press the **Quit** key to end an active application. Pressing the **Quit** key does not affect the status of the calls currently on your telephone.



The **Copy** key is a fixed key that is reserved for future feature development.



Press the **Services** key to access the following items:

- Telephone Option:
 - Volume Adjustment
 - Contrast Adjustment
 - Language
 - Date/Time Format
 - Display diagnostics
 - Local Dialpad Tone
 - Ring type
 - Call Timer
 - OnHook Default Path
 - Change Feature key Label
 - Set Information
- Virtual Office Login and Virtual Office Logout (if *Virtual Office* is configured)
- Test Local Mode and Resume Local Mode (if *Branch Office* is configured)

In-Calls



Press the **In-Calls** key to log in and answer call center calls. The **In-Calls** key is green and is located in the lower right-hand key of the programmable line/feature keys (beside the LCD display).

More..



Press the **More..** key to access the next layer of **Soft Feature** keys.

CallWait



Programmable Line (DN) / Feature Keys (self-labeled) are configured for various features on the telephones.

FWD



Soft Keys (self-labeled) are located below the display area. The LCD label above the key changes based on the active feature.

▶ FWD



Note: A triangle appearing before a key label indicates that the key is active.

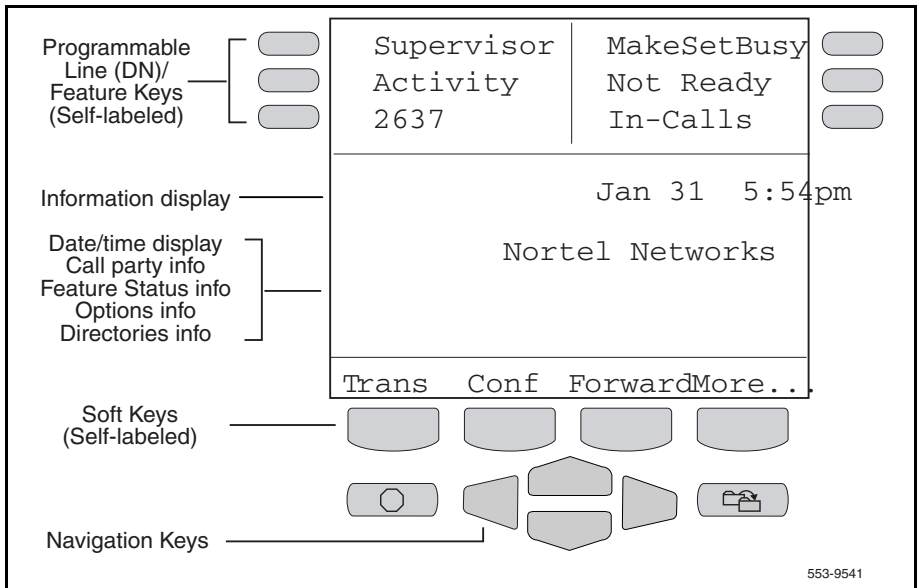
i2004 Internet Telephone display

This section summarizes the display features of the i2004 Internet Telephone. The display is shown in the figure below.

i2004 display area

The i2004 telephone has three display areas:

- The upper display area contains line and feature key status.
- The middle display area contains three lines of information display for items such as called party information and set information.
- The lower display area provides feature key labels.



Agent and Supervisor features

This section describes the following login features that are common to the Call Center Agent and Supervisor:

- Agent Login
- Login with Agent ID and Multiple Queue Assignments
- Agent Logout

Agent Login

Use the Agent Login to enter a ACD queue. If an Agent ID is assigned to you, the Display screen prompts you to enter a four digit code.

Handsfree



1. Press the **Handsfree** key.

In-Calls



2. Press the **In-Calls** key.

Enter Agent ID



3. If “Enter Agent ID” appears on the screen, use the keypad to enter your ID.

#

4. Press the **#** key. The phone goes into a Not Ready state.

In-Calls



or

Not Ready



To join the ACD queue, press the **In-Calls** key or the **Not Ready** key. If you use a headset and the HOML setting is set to No by your system administrator in LD 23:

- Press the **Headset** key and replace the handset in the cradle to receive calls on your headset.
- Change the “On-hook default path” to “Headset Enabled” under the **Services** key.

If the HOML setting is not set to Yes, replacing the handset logs you out of the queue. Contact your system administrator.

Login with Agent ID and Multiple Queue Assignments

A Multiple Queue Assignment (MQA) login involves entering a four-digit Agent ID and up to five ACD DNs, with options of adding a Supervisor ID and up to five Priority values. Choose one of the following Login procedures:

- Agent ID and MQA Login Option
- Default Login

Agent ID and MQA Login Option

Use an Agent ID login with one of the following four MQA login options to enter ACD queues.

Note: A Supervisor logging in to accept ACD calls is prevented by the system from entering a Supervisor ID (including logins where agents are required to enter a Supervisor ID).

Login Option Entries

The login options require the following entries:

1. a four-digit Agent ID,
2. *followed* by a Supervisor ID (if your queue requires one),
3. *followed* by up to five ACD DNs and priority values (if priority values are being used), terminated by ##

To Login:

In-Calls



1. Press the **In-Calls** key.
2. Choose one of the following four login options:

Note: To choose the default Priority or Supervisor ID, enter # instead of a Priority entry or Supervisor ID entry. The Priority or Supervisor ID configured for your set is used.

No Supervisor ID, No Priority



Dial your Agent ID # ACD DN 1 #
ACD DN 2 # ACD DN 3 # ACD DN 4 #
ACD DN 5 # #.

Supervisor ID, No Priority



Dial your Agent ID # Supervisor ID #
ACD DN 1 # ACD DN 2 #
ACD DN 3 # ACD DN 4 #
ACD DN 5 # #.

No Supervisor ID, With Priority



Dial your Agent ID # ACD DN 1 #
Priority 1 # ACD DN 2 # Priority 2 #
ACD DN 3 # Priority 3 # ACD DN 4 #
Priority 4 # ACD DN 5 # Priority 5 # #.

Supervisor ID, With Priority



Dial your Agent ID # Supervisor ID #
ACD DN 1 # Priority 1 # ACD DN 2 #
Priority 2 # ACD DN 3 # Priority 3 #
ACD DN 4 # Priority 4 # ACD DN 5 #
Priority 5 # #.

3. Press the **In-Calls** Key or the **Not Ready Key** to enter the ACD queue.

Default Login

If you normally use the same telephone, use the Default Login to login just one time at the beginning of a shift. The Default Login uses your previous shift's login to place you in the same ACD queues and with the same Supervisor.



In-Calls



1. Press the **Handsfree** key.
2. Press the **In-Calls** key.

Enter Agent ID



Supervisor ID Required

#

or

Supervisor ID not Required

#

In-Calls



or

Not Ready



3. When “Enter Agent ID” appears on the screen, use the keypad to enter your ID.
4. Choose one of the following:
 - a. If your queue requires a Supervisor ID, press the # key three times.
 - b. If your queue does not require a Supervisor ID, press the # key two times.
5. To join the ACD queue, press the **In-Calls** key or the **Not Ready** key.

Agent Logout

You can either logout of the system completely, or temporarily (Not Ready state):

MakeSetBusy



or

Not Ready



To log out, choose one of the following:

1. To log out completely, press the **MakeSetBusy** key.
2. To logout temporarily, press the **Not Ready** key.

If you press the **Make Busy** key while on an ACD call, you log out automatically when the call is finished.

Agent features

The following sections describe features that are available to Agents:

- Answer ACD calls
- Activity code
- Call forcing
- Emergency
- Not Ready
- Answer or Make Non-ACD calls
- Contact your Supervisor

Answer ACD calls

Use the **In-Calls** key to answer the next queued ACD call on the primary DN. The **In-Calls** key is located in the lower right-hand of the programmable line/feature keys.

To answer the call:



When the LCD next to the **In-Calls** key (a green colored key) flashes, press the **In-Calls** key.

Note: The LCD remains lit as long as you are still on the call.

To terminate the call:



or



or



or



To end a call, choose one of the following:

- Press the **Goodbye** key.
- Press the **In-Calls** key.
- Press the individual **DN** line key. (This removes you from the queue).
- Press the **NotReady** key. (This removes you from the queue but keeps you logged in as an agent position) or wait for the caller to terminate the call.

Call forcing

Use the Force Call feature to automatically connect an incoming ACD call. A time interval is set by your system administrator between each incoming call.

In-Call



When calls come in, a short tone indicates the new call. The In-Calls indicator lights continuously and the ACD call automatically goes to your agent position.

Pressing the **In-Calls** key with Call forcing (Auto Answer) on disconnects an active ACD call.

To enable Call Forcing for Headset users:

1. Replace the Handsfree in the cradle after logging in.
2. Through the **Services** menu, set the “On-hook default path” to “Headset Enabled”.

Activity code

Use the Activity code to record the types of activity you are performing.

Activity



1. When the Activity LCD indicator flashes, press the **Activity** key.
2. Use the keypad to enter the Activity code.

Activity



3. Press the **Activity** key again.
4. If performing multiple tasks, repeat these steps.

If configured, Activity codes can be entered while in the Not Ready state.

Emergency

Use the Emergency feature to contact your supervisor immediately in an emergency situation.

Emergency 

1. During an active call, press the **Emergency** key.

Note: The Emergency LCD remains lit as long as the feature is active.

When the supervisor picks up, a three-way call commences with you, your supervisor, and the caller.

Emergency 

2. Press the **Emergency** key again to transfer the caller to the supervisor and terminate your access to the caller and supervisor.

Not Ready

Use the Not Ready feature to take your telephone out of the call queue while completing post-call work.

NotReady 

1. Press the **NotReady** key to temporarily logout of the system.

Note: The NotReady LCD remains lit as long as the feature is active.

NotReady 

2. Press the **NotReady** or **In-Calls** key to return to the queue.

or

In-Call 

Answer or Make Non-ACD calls

This feature enables you to use your individual line to receive and place calls.

To place a call:

1234



1. Press your individual **DN** key.
2. Use the keypad to dial the telephone number.

Note: The LCD remains lit as long as you are still on the call.

To answer the call:

1234



When the LCD next to your individual DN key flashes, press the **DN** key.

Note: The LCD remains lit as long as you are still on the call.

Contact your supervisor

Use the Supervisor feature to talk to your supervisor in the following ways:

- Answer a call from your supervisor.
- Answer a call from your supervisor when on another call.
- Place a call to your supervisor.
- Conference your supervisor in when on another call.
- Transfer a call to your supervisor.

Answer a call from your supervisor

Supervisor



When the LCD next to the **Supervisor** key flashes, press the **Supervisor** key.

The LCD remains lit as long as you are still on the call.

Answer a call from your supervisor when on another call

Supervisor 



Supervisor 



The LCD next to the **Supervisor** key flashes and a buzzer sounds.

1. Press the **Hold** key to put the current call on hold.
2. Press the **Supervisor** key.
3. Press the **Hold** key to resume the call on hold.

Place a call to your supervisor

Supervisor 

Press the **Supervisor** key.

Note: Calls are automatically put on hold when you use the Supervisor key.

Return to the ACD call

In-Call 

Press the **In-Calls** key.

Conference your supervisor during a call in progress

Supervisor 

Supervisor 

1. Press the **Supervisor** key to talk privately with your Supervisor.
2. Press the **Supervisor** key again to conference the call with your Supervisor and caller.

Transfer a call to your supervisor during a call in progress

Supervisor 

Supervisor 



1. Press the **Supervisor** key.
2. When your Supervisor answers, press the **Supervisor** key again.
3. Press the **Goodbye** key to terminate your access to the call.

Supervisor features

The following sections describe features that are available to Supervisors:

- Answer Agent
- Agent key
- Answer Emergency
- Call Agent
- Interflow
- Night Service
- Observe
- Display Agent status
- Display Queue

Answer Agent

Use the Answer Agent to receive calls from Agents in a non-emergency situation.

AnsAgent



1. When the LCD next to the Answer Agent key flashes, press the **Answer Agent** key.

Note 1: The Agent ID of the individual contacting you displays on your telephone.

Note 2: The LCD remains lit as long as you are on the call and your status changes to NotReady.



2. Press the **Goodbye** key to end the call.

Agent key

Use the Agent feature to connect, observe, or monitor the status of each agent position. Each **Agent** key links to a particular agent position and can be used along with the **Call Agent** or **Observe Agent** keys.

Agentkey



Press the **Agent** key. The Agent’s status displays as follows:

LCD Display	Meaning
Off	Agent is not logged in.
On	Agent is logged in but is either Not Ready or on a call.
Slow Flashing	Agent is waiting for an ACD call.
Fast Flashing	Agent is on a non-ACD call.

Answer Emergency

Use the Answer Emergency feature to receive calls from agents in an emergency situation.

AnsEmreg



1. When the LCD next to the Answer Emergency key flashes, press the **Answer Emergency** key.

Note 1: The Agent ID of the individual contacting you displays on your telephone.

Note 2: The LCD remains lit as long as you are on the call and your status changes to NotReady.



2. Press the **Goodbye** key to end the call.

Call Agent

Use the Call Agent feature to contact an Agent.

CallAgt



1. Press the **Call Agent** key.

Agentkey



2. Press a selected **Agent** key or dial the agent's Position ID.

or



3. Press the **Goodbye** key to end the call.

Interflow

Use the Interflow feature to redirect calls when the backlog or wait time exceeds a pre-defined threshold.

Interflow



1. Press the **Interflow** key.

Note: The Interflow LCD flashes while the feature is active.

Interflow



2. Press the **Interflow** key again to deactivate the feature and resume normal call flow.

Night Service

Use the Night Service feature to define how calls are handled outside of business hours.

Activate Night Service

NightSvc



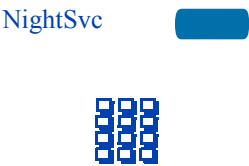
1. Press the **Night** key.



2. Press the **6** key (6 = N for Night) to go into Night Service.

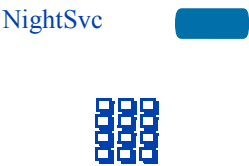
The Night Service LCD lights continuously. All calls in the queue and new calls receive night service.

Transition to Night Service



1. Press the **Night** key.
2. Press the **8** key (8=T for Transition) to activate Transition mode.
The Night Service LCD flashes. All calls in the queue remain in the queue and new calls receive night service.

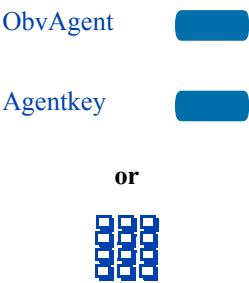
Deactivate Night Service



1. Press the **Night** key.
2. Press the **3** key (3=D for Day) to resume Day mode.
The Night Service LCD flashes. New calls enter the queue.

Observe

Use the Observe feature to monitor an agent in a call.



or



1. Press the **Observe** key.
2. Press a selected **Agent** key or dial the agent's Position ID.
3. Press the **Call Agent** to talk to the agent you are monitoring.
4. Press the **Observe** key to terminate the observation.

Display Agent status

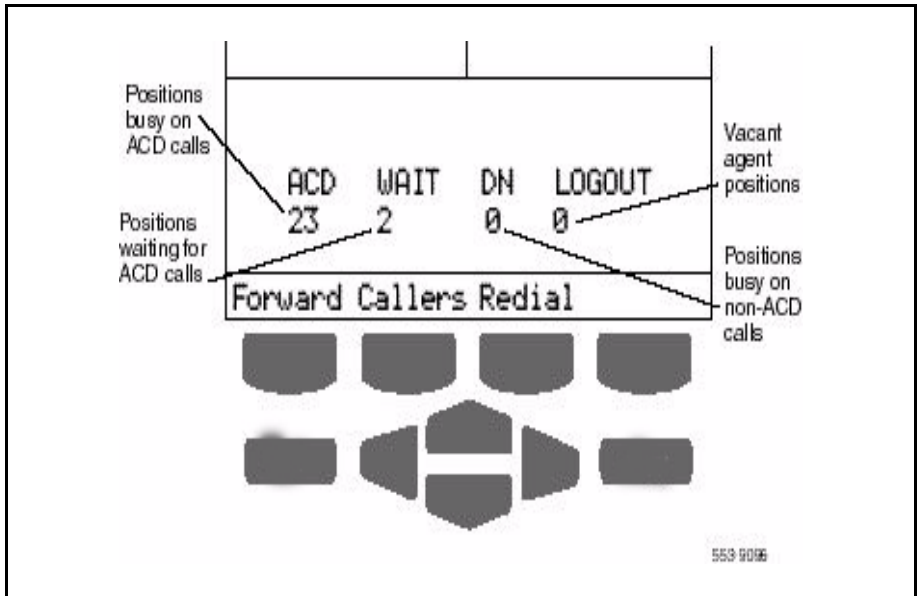
Use the Display Agent feature to view a summary of current status for all agents who have an agent Position ID key assigned on the Supervisor's telephone.

DisplayAgt



Press the **Display Agent** key. The summary information displays for twelve seconds or until another feature key is pressed.

Agent positions in the Not Ready state are counted as busy on either ACD calls or non-ACD calls, as specified by your system administrator.



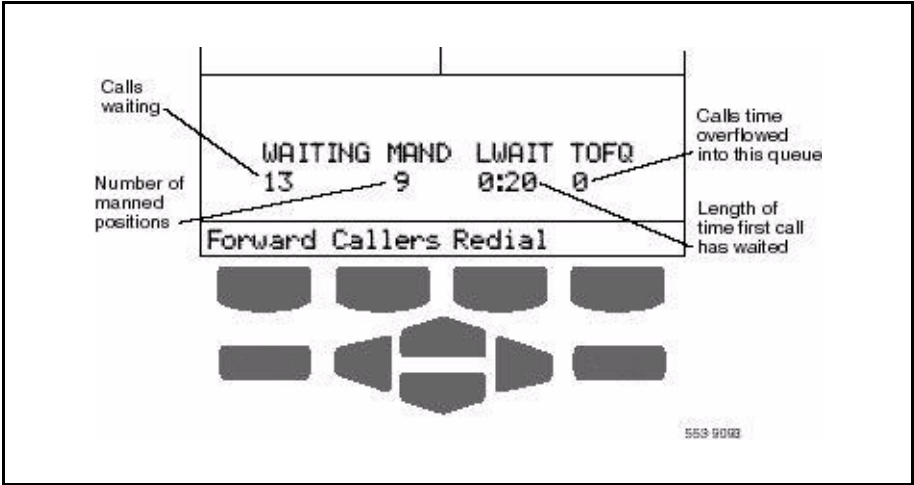
Display Queue

Use the Display Queue feature to view the number and status of calls waiting in the queue.

DisplayQue 

Press the **Display Queue** key.

The queue’s status appears on your telephone display:



The LCD indicator beside the Display Queue key gives you a visual indication of the number of calls in the ACD queue. The following table lists the four states for this LCD indicator:

Indicator	Queue Status	Meaning
Off	Light	There are few or no calls waiting.
On	Normal	An acceptable number of calls are waiting.
Slow Flashing	Busy	Calls are backing up in the queue. Calls overflowing to this queue will not be accepted.
Fast Flashing	Overloaded	Too many calls in this queue. New calls are being overflowed to another queue.

Meridian 1, Succession 1000, Succession 1000M

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