ISOETEC® SYSTEM/228 ACD Agent User Guide November 1989

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Hold, cont.

How To: Reconnect To Outside Line Calls On Hold.

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Action	Result	Comment
Press the [OUTSIDE LINE] key.	The [OUTSIDE LINE] key LED lights steady, and you are connected to the call.	

Hold

Description: Any External call may be placed on either Inclusive or Exclusive Hold. If an External call is placed on Inclusive Hold, anyone with access to that [OUTSIDE LINE] can answer the call. If an External call is placed on Exclusive Hold, the call can only be answered at the station which placed the call on hold.

Note: If the LED above your [HOLD] key is flashing, another extension has left a message for you. Refer to the pages on MESSAGE WAITING in the System/228 Station User Guide.

How To: Use Inclusive Hold On [OUTSIDE LINE].

Action	Result	Comment
(While on current call), press the [HOLD] key.	The [OUTSIDE LINE] key LED blinks rapidly.	Press the [HOLD] key only once.

low To: Use Exclusive Hold On [OUTSIDE LINE].

/) / key twice. LIN	[OUTSIDE [E] key LED ks slowly.
	as slowly.

What Is ACD?

Your company has chosen ISOETEC's SYSTEM/228 Automatic Call Distribution (ACD) because your business needs a phone system which allows a few individuals to handle a large quantity of Incoming phone calls. ACD provides a way to make your phone system more efficient and profitable for both your company, and the people with whom you do business.

ISOETEC's SYSTEM/228 ACD is used to distribute Incoming ACD calls evenly among the ACD agents, ensuring a shared work load. Each Incoming call is presented to the agent position which has been available the longest.

Automatic Call Distribution (ACD) provides the capability to automatically route Incoming calls to an intended call handler (an agent). The basic functions of ACD are:

- -SEARCH for an available call handler (agent) in such a manner that calls are distributed on an equitable basis. Incoming calls can be directed by the system to one of 15 different ACD groups.
- -QUEUE calls when agents are busy, by acknowledging callers, (typically through the use of a recorded announcement), and continuing to search for an available agent.
- -CAPTURE information on call traffic, and report statistics which will assist the management of the ACD operation.

What Is Non ACD?

A non ACD call is any call made by an Agent, or any incoming call which was not processed by the ACD system.

It is helpful for the system to be able to note these non ACD calls in order to analyze respective times spent by agents and groups in performing different types of calls.

References to Non ACD applications appear throughout this guide in relation to each applicable function.

Terms Used In This Guide

Split

ACD Trunk

Agent	A person who is designated to handle incoming calls through the ACD
	system. The system can gather statistics based on Agent activity. The
	system can have up to 200 ACD Agents defined

A label given to a number of Agents designated to handle calls from an ACD Trunk Group. There are 15 possible ACD SPLITS.

Group Incoming trunk lines are defined to ring a particular ACD SPLIT. **Queue** Oueue is used to designate the program sequence the system follow

Queue is used to designate the program sequence the system follows if all agents within the SPLIT are busy.

ACD Group This is the combination of incoming trunks, the agents assigned to handle the incoming calls, and the sequence of events followed when all agents are busy.

This term is used to indicate the process an agent uses to let the system know ACD calls can be routed to the telephone the Agent is using.

Transferring Calls, cont.

How To: Transfer A Call To Another ACD GROUP.

Action	Result	Comment
(While on current call), press the [TRAN/CON] key.	Current call is placed on hold.	
Dial 4 7 plus the desired ACD group number 0 1 thru 1 5.	Double tone is heard and the [OUTSIDE LINE] key LED goes out.	The call will go into the desired ACD group, and wait for the next available agent in that group.
plus thru	The [WRAP UP] key LED lights, and the call can be qualified.	
Replace the handset, or press the [RLS] key.	The transfer is complete.	

Transferring Calls, cont.

How To: Transfer An Outside Line Call To ANOTHER EXTENSION In Your System.

Action	Result	Comment
(While on current call), press the [TRAN/CON] key.	Current call is placed on hold.	
Dial the desired 4 digit extension number. or	The called extension's Hands Free mode is activated.	If your System Manager has programmed the [HF] Receive option to "No", the called agent's or extension will ring instead of activating
Dial I plus the desired 4 digit extension number to make the called extension ring.		[HF].
plus		
TPP. thru YTTP		

How To Use This Guide

This guide gives you easy to follow instructions on how to get the most from the features and functions of your telephone, and ACD system. Each feature or function description is made up of one or more of the following parts:

Title: The feature or function name. Some require that a key on your exten-

sion be programmed by your System Manager, or that your system be

equipped with some kind of option.

Description: A description of what the feature or function does.

How To: Begins the step by step procedure to use the feature.

Graphics: A picture showing the action you must take in order to make the feature

or function work.

Action: A step by step description of what you do in order to make the feature

or function work.

Result: What the result is of the action you have taken.

Comment: More information about the feature or function.

The concept behind all ISOETEC products is to produce telephone systems which offer the user flexibility, efficiency and innovative features. ISOETEC phone systems have the ability to grow and develop as your business needs change. With that in mind, it should be noted that all dial access codes, including extension numbers, may vary from the ones indicated in this guide. The numbering system used in this guide is an example of the standard numbering system only—your telephone system may or may not be numbered as illustrated in this guide.

Your System Manager will inform you of any dial access codes on your particular phone system which are different from the ones used in this manual.

Extension Numbers	thru
Extension Numbers	unu

The Telephones

The ISOETEC System/228 allows calls to be made from one station to another (Internal calls). You may call another extension by ringing the telephone, or you may call another station and activate the hands free feature of the other station (voice announce). The system also provides for calls on outside lines (External calls).

The ISOETEC SYSTEM/228 ACD Agent can use either a 17-key phone, a 28-key phone, or a 29-key Display Phone.

The 17-key phone has eleven programmable feature keys, and six "fixed" teys (HOLD, TRAN/CON, HANDS FREE, PROGRAM, VOLUME UP, and VOLUME DOWN).

The 28-key phone has 22 programmable feature keys, and the same six 'fixed" keys.

The Display Phone has 20 programmable feature keys and the standard six "fixed" keys s well as three "soft" keys whose use is flexible, dependent upon what feature or unction is being used.

'rogrammable keys may be changed to suit the user's feature requirements, while fixed" keys always remain as their assigned function. The feature keys will be programmed by you or your System Manager to suit your specific business needs. Some of our feature keys will be devoted to ACD. A description of the "fixed" keys, whose unction may not be changed, follows:

IOLD Places your current call on Hold.

RAN/CON Places your current call on Hold while it awaits Transfer, Orbit, or Conferencing functions.

ROGRAM Used in a specified sequence in order to enable programming of different features and functions. The [PROGRAM] LED will time out after approximately six seconds.

Note: If the [PROGRAM] LED goes out before you have entered the necessary information, you have waited too long, and the programming period has timed out. Programming will have to be initiated again.

Transferring Calls

Description: Calls may be transferred from one extension in your ACD System to another. Calls may also be transferred to another ACD Group, or to a specific ACD agent's number.

Note: Should a call be transferred to you, the ACD system will search for your assigned agent number, and find you regardless of the extension to which you are logged on.

How To: Transfer A Call To ANOTHER AGENT Who Is Logged On In Your System.

_		Action	Result	Comment
1.	PROG TR/CON VOL	(While on current call), press the [TRAN/CON] key.	Current call is placed on hold.	
2.	Tay	Dial 8 plus the desired agent number 0 0 1 thru 2 0 0.	Double tone is heard and the called exten- sion's Hands Free mode is activated.	If the called extension is busy, the call will be camped on to the busy extension.
	plus	İ		
	thru			
3.		Announce the call, and replace the handset, or press the [RLS] key.	The call is transferred to the desired agent at the extension the agent is currently using.	You may chose to replace the handset after dialing the agent number and not announce the call.

If an agent is not logged on, a fast busy tone will be heard. You may reconnect to the call if you wish by pressing the blinking [OUTSIDE LINE] key where the call is waiting.

If your System Manager has programmed the [HF] Receive option to "No", the called agent's extension will ring instead of activating [HF].

Intercom Calls

How To: Call Another AGENT In Your System Using The Agent Number.

Action	Result	Comment
Lift the handset, or press the [RLS] key.	Internal dial tone is heard.	
or		
Dial 8 plus the desired agent number. plus	The extension on which the agent is logged on begins to ring.	Agent numbers range from 0001 thru 2000. If the Agent is logged off the system, a fast busy tone is heard.
thru AMP OFFIN OFFIN OFFIN		

The Telephones, cont.

VOLUME UP/ Adjusts the volume to comfortable levels. The volume adjustments apply to the function to which you are currently connected. To increase speaker volume press VOLUME ▲ key. To decrease speaker volume press VOLUME ▼ key. The volume can be set, and placed in memory, for the following eight functions:

- 1. Handset on Outside call.
- 2. Handset on Internal call.
- 3. Hands Free on Outside call.
- 4. Hands Free on an Internal call.
- 5. Page volume.
- 6. Outside line ringing volume.
- 7. Internal line ringing volume.
- 8. Background Music volume.

The 28-key phone and the display phone have the following key:

HF Hands Free – Allows you to converse with another party on Internal and External calls without having to lift the handset.

The 17-key phone has the following key:

VA

Voice Announce – Allows you to converse with another party on Internal calls without having to lift the handset. Hands Free conversations with Outside parties are not possible with this telephone set.

Before You Begin Receiving Calls

The ISOETEC System/228 allows any ACD agent to use any telephone that has been programmed for use with ACD, that is, several of the programmable feature keys have been programmed for ACD uses. The system needs to know who you are (your agent number), what incoming calls are to be directed to your telephone (group number), and the priority you have for receiving calls in the group. There are 200 possible agent numbers, 15 possible group numbers, and 4 possible priorities. The process of giving this information to the system is called "LOG ON".

Dependent on how your System Manager has programmed your ACD, you may log on automatically, by pressing the [LOG] key, or manually, by following a prescribed procedure. Each agent must also be assigned a PRIORITY number, 0 thru 2 (priority 3 is reserved for secondary agent), in order to log on manually.

As an agent, you have been assigned a 3-digit agent number and an ACD Group Number, and a Priority number. You may want to record them below for easy recall.

Group Number:	
Agent Number:	
?riority Number:	

As an ACD agent, you will always have to log on before you begin your ACD related ictivities. You use the ACD [LOG] key to either log "sign") ON or OFF the ACD System.

During the course of the day, you may have to leave your telephone or temporarily stop eceiving calls. The system knows not to send you calls with the use of the UNAVAIL-ABLE] key.

In indication can be left on the supervisor's terminal that you need assistance with the HELP] key.

Certain types of businesses need information about a telephone call. A three digit qualification" code can be entered into system memory for each call. The [OUALIFY] ey is used to enter this code. Your system manager will define what each three digit ode means.

Intercom Calls

Description: You may call another Internal Extension or specific agent in your system by using the Intercom.

How To: Call Another EXTENSION In Your System Using Extension Number.

	Action	Result	Comment
1.	Lift the handset, or press the [RLS] key.	Internal dial tone is heard.	
or	:		
RIS			
2. Thru thru	Dial the desired 4 digit extension number.	The called extension's [HF] speaker is activated, and [HF] LED blinks.	Intercom call is complete. If the called extension is in Do Not Disturb, a fast busy signal is heard.
1	Dial 1 plus the desired 4 digit extension number in order to ring the extension.		
plus			
THU THE FEE			

Call Qualifying List

For reference you may record your most frequently used qualification codes below.

ENTER	FOR	ENTER	FOR
151		176	
152		177	
153		178	<u>-</u> -
154		179	
155		180	
156		181	
157		192	
158		183	
159		104	
160		185	
161		186	
162		187	
163		188	
164		189	
165		190	
166		191	
167		192	
168		192	
169		194	
170		195	
171		196	
172		197	
173		198	
174		199	
175		200	

ACD [LOG] Key

Description: The [LOG] key on your phone is used to log (sign) you on or off the system, so that you can answer calls and so that your ACD Manager can keep statistical information for each agent in the system. A maximum of 200 people can each be assigned a 3-digit agent number (001 through 200). For example, a 50 extension ACD system can have 4 shifts of agents per day, every agent assigned a unique agent ID number. In addition, up to 15 distinct ACD Groups, numbered 01 through 15, can be designated.

When an agent is logged off, the agent and the extension that the agent is using is no longer in the ACD System, and will not receive ACD Incoming calls. Any agent may log on at any ACD phone as long as that extension has assigned ACD Keys programmed.

Once an agent is logged on, that number belongs to that agent, and cannot be used to log in on any other ACD station.

How To: Log On When System Is Programmed For AUTOMATIC Log On.

		e
Action	Result	Comment
Press the ACD [LOG] key.	The ACD [LOG] key LED will flash rapidly.	The ACD [LOG] key will flash for up to 6 seconds waiting for your 3 digit agent number.
Enter your 3 digit Agent Number 0 0 1 thru 2 0 0 on the dial pad of your phone.	The ACD [LOG] key is lit steady.	You are now available to receive ACD calls, and statistics will be kept until you have logged off.

ICD [LOG] Key, cont.

low To: Log On When System Is Programmed For MANUAL Log On.

	Action	Result	Comment
	Press the ACD [LOG] key.	The ACD [LOG] key LED will flash rapidly.	The ACD [LOG] key will flash for up to 6 seconds waiting for you to dial *.
	Press * on the dial pad of your phone.		
thru	On the dial pad, enter your Priority number 0 thru 2.		Priority numbers are assigned by your System Manager so that those best equipped to handle ACD calls can be designated to answer the majority of the calls.
			0 is the highest priority, and 2 is the lowest priority.
thru	(Before the 6 second time out), enter the Group number [0] I thru [1] [5] on the dial pad of your phone.	The ACD [LOG] key will flash slowly.	
COMMEN OF THE PROPERTY OF THE	Enter your 3 digit Agent number 0011 thru 200 on the dial pad of your phone.	The ACD [LOG] key is lit steady.	You are now available to receive Incoming ACD calls, and statistics will be kept until you have logged off.

Call Qualifying List

For reference you may record your most frequently used qualification codes below.

ENTER	FOR	ENTER	FOR
101		126	
102		407	
400		400	
104		400	
4.6=			
100		4 0 4	
		400	
100		133	
100		404	
140		40=	
44		400	
140		127	
149		400	
4.4		400	
4 2		140	
16			
47		4.40	
140		140	
40		1//	
100		4.42	
04		4.40	
00		4.49	
00		1.40	
24		140	
25		150	

Call Qualifying List

For reference you may record your most frequently used qualification codes below.

ENTER	FOR	ENTER	FOR
051		076	_
052		077	
053		078 ,	
054		079	
055		080	
056		081	
057		082	
058			
NEO.		004	
060		085	
061		086	
062		087	
063		088	
064		089	
765			
066		091	
067		092	
)68		093	
)69		094	
)70		095	
)71		096	
)72		097	
)73		098 _	
)74		000	
)75		099 100	

ACD [LOG] Key, cont.

Description: When you have completed taking calls for the day, or are directed to log in on another ACD group you must LOG OFF.

How To: Log Off.

Action	Result	Comment
-Press lighted ACD [LOG] key.	Result The ACD [LOG] LED will go out.	You are logged off, and no longer active in the ACD System. This means that statistics will stop accumulating until you LOG ON again at an ACD extension.

ACD [UNAVAILABLE] Key

Description: If you have to leave your work area, or you have to perform an activity which requires your full attention, you must inform the ACD System that you will not be available to receive any Incoming ACD calls. Your [UNAVAILABLE] key may be labeled [UNAVL], or [NOT AVAIL].

During the time you are "not-available", you are still able to receive non ACD calls transferred to your ACD extension, and intercom calls (calls from another extension in your system).

How To: Use Your ACD [UNAVAILABLE] Key, So That The ACD System Will Not Route Calls To Your Extension.

Action	Result	Comment
Press the ACD [UNAVAILABLE] key.	The LED next to the [UNAVAILABLE] key will blink.	You are now unable to receive ACD calls, but you are still logged on to the ACD system. The system will record this time as "not available."

Note: The system automatically makes you unavailable if you don't answer an Incoming ACD call directed to you within a predetermined period of time. In effect, your phone will become "busied out" by the ACD system for some preprogrammed period of time, and the ACD [UNAVAILABLE] LED will blink to indicate your status is considered to be "unavailable" for as long as that LED continues to blink. When that time period is over, the ACD [UNAVAILABLE] LED stops blinking, and the ACD [UNAVAILABLE] LED will turn OFF. The ACD System will once again be able to route Incoming ACD calls to your phone.

Call Qualifying List

For reference you may record your most frequently used qualification codes below.

ENTER	FOR	ENTER	FOR
001		026	
002		027	
003		028	
004		029	
005		030	
006		031	
007		032	
008		033	
009		034	
010		A2E	
011		036	
012		027	
04.0		030	
014		039	-
015			
016		0/11	
017		042	
A40			
019		044	
020		045	
024		046	
022	· · · · · · · · · · · · · · · · · · ·	047	
023		048	
024		049	
025		050	

ACD [QUALIFY] Key (For ACD And Non ACD Calls)

Description: The [QUALIFY] key provides an easy way for you to describe each ACD call you receive, or any Non ACD Outside line calls you initiate. As many as 200 qualification categories are available, one of which will help you categorize your last call. The qualification time must take place during the wrap up time immediately after the call has been terminated.

Your ACD Manager may wish to require a qualification code be entered instead of making it an option. This is called Forced Qualification.

With Forced Qualification, wrap up will go beyond its preprogrammed time, and the wrap up LED will not go out until the terminated ACD call is qualified.

An ACD or Non ACD call can be qualified for more than one activity.

Multiple qualifications must be done during the wrap up time. Your ACD Manager will

keep you informed of any recent changes or additions to your specific qualification list.

How To: Qualify An ACD Or Non ACD Outside Line Call.

Action	Result	Comment
After completing an ACD or non ACD call replace the handset, or press the [RLS] key if a headset is used.	The [WRAP UP] LED will flash rapidly.	Note: Non ACD calls may be qualified only if your System Manager has programmed your system for this function.
(During wrap up time), press the [QUAL] key once.	The LED next to the [QUAL] key will blink rapidly.	
Enter the appropriate 3 digit qualification number from 001 thru 200.	The LED next to the [QUAL] key will go out.	If multiple qualifications is necessary, repeat steps 2 and 3. The qualification number should correspond to the nature of the call just completed.

ACD [UNAVAILABLE] Key, cont.

Description: After you have completed your work, and are to begin receiving calls again, the unavailable key is used again.

How To: Use Your ACD [UNAVAILABLE] Key, So That The ACD System Will Route Calls To Your Extension.

Action	Result	Comment
Press the blinking [UNAVAILABLE] key.	You are now available to receive ACD calls.	
		Mark Mark

Answering Calls - Handset

Description: An Incoming ACD call will ring at your extension when you are the next available agent in your ACD Group.

Note: There are two distinct tones which indicate an ACD call. One is the tone indicating a call from your primary group, and the other tone indicates a call from another ACD group in your system.

An Incoming ACD call may be answered using the handset on your extension, or a headset if one is available for your use.

How To: Answer An Incoming ACD Call Using A Handset.

Action	Result	Comment
1. (Upon hearing your phone ring), lift the handset.	You will automatically be connected to the Incoming call.	Comment

ACD [WRAP UP] Key

Description: When you complete an Incoming ACD call, there is a predetermined "wrap up" time which allows you to complete any extra work which might relate to the last Incoming ACD call. During this "wrap up" time, you are not able to receive another ACD call. You may, however, receive ICM calls, and Non-ACD Outside line calls.

아이가 그 사이 그것, 얼굴하다고 그 그렇게 뭐 했다고 말다.

When the preprogrammed "wrap up" time is over, the [WRAP UP] LED will go out, and you will automatically become available for an ACD call. You may resume work before the "wrap up" time has ended, but you can not extend the "wrap up" time. If you need more time you must use your [UNAVAILABLE] key.

The system may also be programmed such that the [WRAP UP] key may also be used for completed Non-ACD Outside line calls.

How To: "Wrap Up" An ACD or non ACD Call.

Action	Result	Comment
(After completing ACD or non ACC call), replace the handset, or press [RLS] key if you using a headset.	the [WRAP UP] key blinks rapidly.	The blinking LED indicates that you are in wrap up time. Note: Non ACD wrap up must be programmed by your system Manager in order to function.

If you do not need the wrap up time to complete paperwork or other work related to the last ACD call, press the [WRAP UP] key once, and LED will go out. You are now available for another ACD call.

If your System Manager has programmed your ACD System for Forced Qualification, the [WRAP UP] LED will not go out until the call has been qualified.

ACD [HELP] Key

Description: Whenever you are unable to leave your work area, and you wish to request assistance from your System Manager, press the ACD [HELP] key.

Once you press the ACD [HELP] key, the [HELP] LED will flash rapidly and your request for help will be signaled to your System Manager on that person's display terminal. Your Manager may then:

- 1. Search through the ACD groups and agents to determine who is requesting help.
- 2. Use the [BARGE IN] key, if it is programmed, to listen to the conversation and determine what the problem is. If it is deemed appropriate, your Manager may initiate a three-way conversation in order to directly address the matter.

When the problem has been solved, or if you wish to cancel your help call, press the blinking [HELP] key once, and the LED will go out.

How To: Request Help From Your ACD System Manager.

Action	Result	Comment
Press the [HELP] key.	The [HELP] LED will blink rapidly.	Your request for help is signaled to your Manager on the ACD terminal.

How To: Cancel Your Request For Help From Your ACD System Manager.

Action
(Without lifting the handset or pressing the [RLS] key), press the blinking [HELP] key

Answering Calls - Headset

Description: When using a headset in place of the handset on your extension, your ACD Manager can program your extension so that upon hearing 3 beeps in the headset, you are automatically connected to the Incoming call. In order to do this, your System Manager must program the "Zap" feature to "Yes". When using a headset with your telephone, you will be using a [RELEASE] key which may be labeled [RLS] on your telephone.

Note: If your System Manager has programmed "zap" to "Yes", make certain you have logged off or pressed your [UNAVAILABLE] key before removing your headset. If you fail to do this, and your phone is not idle when you leave your work area, Incoming ACD calls will continue to be directed to your extension, but will not be answered.

If your System Manager has programmed "Zap" to "No", calls your extension will ring on your phone instead of the headset.

How To: Answer An ACD Call Using A Headset when "Zap" is programmed YES.

	Action	Result	Comment
1.	An incoming call is indicated by 3 beeps in your headset.	You are automatically connected to the incoming call.	
2.	Press the [RLS] key to end the call.		You can now wrap up or qualify the call.

Answering Calls - Headset, cont.

low To: Answer An ACD Call With Headset When "Zap" Is Programmed NO.

Action		Result	Comment
	(An incoming call is indicated by 2 beeps), press the [RLS] key.	You are connected to the Incoming call.	You will hear 2 beeps in your headset which indicates a call is ringing your telephone.
AS OF	Press the [RLS] key to end the call.		

ACD [QUEUE] Key LED

Description: Your extension has an LED (one of the lights which is next to a programmable key on your phone) programmed to use as an indication of how many calls are waiting in line to be answered. The key next to this LED is non-functioning in this feature.

The purpose of the ACD [QUE] key LED is to make it easy for you to know how many ACD calls are in queue (waiting) to be answered by ACD agents. The flash rate of this LED gives you this information.

The LED indicates by its flash rate how many Incoming ACD calls are in queue (waiting) to be answered by an ACD Agent.

LED is steadily lit = 1 call in queue.

LED flashes slowly = 2 calls in queue.

LED flashes rapidly = 3 or more calls in queue.

You may also have an External indicator which is used with your System to indicate how many ACD calls are in queue to be answered. This is generally a light on the wall which blinks at different rates - each rate of blinking indicating a certain amount of waiting calls. Your ACD manager determines how many waiting calls is indicated by which flash rate through system programming.