

MITEL NETWORKS

# 6140 | Agent Portal

AGENT PROCEDURES GUIDE

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# Agent procedures for Agent Portal Client

After the Agent Portal Server and Client are configured, the Agents can log in and begin using the Agent Portal Client. Agents use the Agent Portal Client to perform the following procedures:

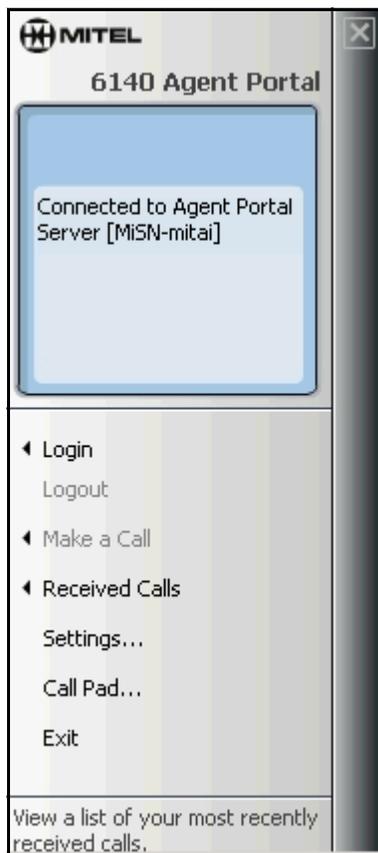
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## Logging in to Agent Portal Client

Use the following procedure to log in to the Agent Portal Client interface:

1. From the Programs menu, select Mitel Networks, 6140 Agent Portal Client.  
The Agent Portal icon is displayed in the system tray. The icon is red before you log in to the system.
2. Select the Agent Portal icon.  
The Agent Portal Client interface is displayed. (See Figure 5-1)

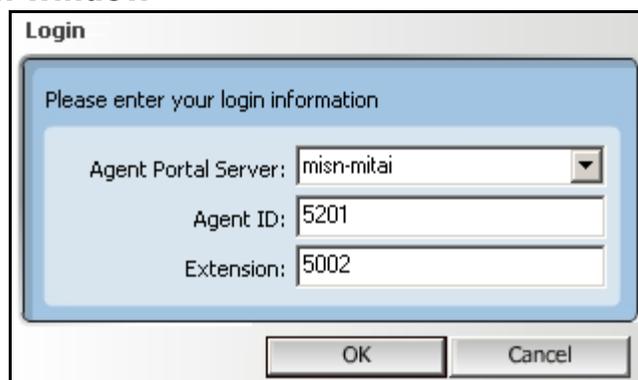
**Figure 5-1 Agent Portal Client interface**



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3. Select the **Login** option.  
The Login window is displayed. (See Figure 5-2)

**Figure 5-2 Login window**



4. In the Login window, enter your Agent Portal Server name or ip address.
5. Enter your agent ID and your extension number.  
If you do not enter your agent ID, calls can only be sent to your extension number.
6. Select **OK**.
7. The Status window displays the message 'Login Successful'.

## Logging out of Agent Portal Client

If you wish to log out of the Agent Portal Server but leave the Agent Portal application running, use the following procedure:

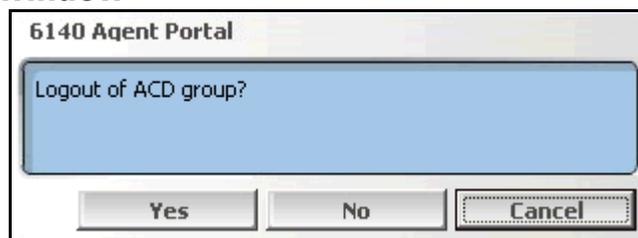
1. In the Agent Portal interface, select **Logout**.  
The Status window displays the message 'Logout Successful'.

## Exiting Agent Portal Client

If you wish to log out of the Agent Portal Server and close the Agent Portal application, use the following procedure:

1. In the Agent Portal Client interface, select **Exit**.  
One of the following occurs:
  - The Agent Portal Client interface is closed.
  - A message is displayed asking if you wish to logout of ACD group. (See Figure 5-3)

**Figure 5-3 Exit window**



- This window indicates that you have not logged out of the Agent Portal Client.
2. If this window is displayed, select a button:
    - If you wish to log off Agent Portal Client and log out of the ACD, select **Yes**.

- If you wish to log off Agent Portal Client and remain logged into the ACD, select **No**. The Agent Portal Client is shut down.

## Making a call

You can use a telephone set to make a call or you can use the **Make a Call** option on your 6140 Agent Portal Client interface. Use the following procedure to make a call using the Agent Portal Client:

1. In the Agent Portal Client interface, select the **Make a Call** option. The Make a Call window is displayed. (See Figure 5-4)

**Figure 5-4 Make a Call window**

2. Enter the telephone number you wish to dial. If it is necessary to dial a prefix, select the Prefix option and select a number from the drop-down list.
3. Select **Dial**. The dialed number is displayed in the interface display window.

## Displaying and returning received calls

The Received Calls options allows you to display a list of all the calls you have received as well as to return any of these calls. Information for up to 20 received calls is saved. If more than 20 calls are received, the system begins deleting the oldest calls first. Use the following procedure:

1. In the Agent Portal Client interface, select the **Received Calls** option. The call number is displayed with the person, date and time of the call. (See Figure 5-5)
2. If you wish to call one of the listed numbers, select the number and then select **Dial**. The 'Make a Call' window is displayed with the selected number entered in the 'Phone Number' field.
3. Select **Dial**.

Received calls continue to be stored and displayed on this window until you clear the list. To clear all the entries in this list, select **Clear List**.

**Figure 5-5 Received calls window**



Name	Phone Number	Date	Time
Dave Thompson	6135922122	11/19/2002	09:18:50 AM
J. Sandbury	6138353999	11/19/2002	08:54:48 AM
A & L Collins	6132568973	11/19/2002	08:54:23 AM
John Faulkner	5192436932	11/19/2002	08:50:54 AM
D Mullin	7056824569	11/19/2002	08:43:43 AM
George Bradley	8194587531	11/19/2002	08:43:37 AM
Neale Seguin	4167548090	11/19/2002	08:43:29 AM
D & W Blue	8195265551	11/19/2002	08:41:49 AM
Andrew Smith	6138354040	11/19/2002	08:19:33 AM
T. Madley	6138356574	11/19/2002	08:15:07 AM
Jason Taylor	4167854320	11/19/2002	08:13:52 AM
B. Burchell	4167829565	11/19/2002	08:10:57 AM
H. Duriez	8198734500	11/19/2002	08:07:46 AM
T. Geiger	8198965343	11/19/2002	08:03:14 AM
J. Cameron	7056740140	11/19/2002	08:01:38 AM

## Stop monitoring a device

Use the following procedure to stop the monitoring for a device:

1. In the Agent Portal Server interface, select **Monitors**.  
The Device Monitors window is displayed. (See Figure 5-6)

**Figure 5-6 Device Monitors window**

Enable Monitors For Devices (ie. IVR, Voicemail, etc.)

Monitor	Type
▶ 5005	EXTENSION

New Delete

Monitor: 5005

Monitor Type: EXTENSION

Save

2. Select **Stop**.  
Monitoring is stopped for all devices. The status window indicates that the monitors are stopped. At this point, you can delete any device from the Device Monitoring window.
3. In the upper pane, select the device you wish to stop monitoring.
4. Select **Delete**.
5. Select **Start**.  
All the devices listed in this window are currently being monitored.

## Using other applications displayed on your screen

Your Agent Portal Client interface may have been configured to launch third party applications which display caller information. For more information on using some of these applications in Agent Portal, refer to

- “Using Call Pad” on page 51
- “Using Contact window in Microsoft Outlook” on page 52
- “Using Journal Entry window in Microsoft Outlook” on page 53

## Using Call Pad

If the Call Pad window is displayed on your workstation, use the following procedure to update the existing information:

1. Enter additional information in this window.
2. Select **Save** from the File menu.

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3. Close the window, using the Windows Close button.  
A message is displayed which asks you if you want to save the changes.
4. Select **OK**.
5. Browse to the folder where you wish to save this file.
6. Select **Save**.

### Using Contact window in Microsoft Outlook

If the Contact window is displayed on your workstation, use the following procedure to update the existing information or to return the call:

1. Using standard Microsoft Outlook procedures, update the information in this Contact window. (See Figure 5-7)

**Figure 5-7 Contact window in Microsoft Outlook**

The screenshot shows the 'John Sims - Contact' window in Microsoft Outlook. The window title is 'John Sims - Contact'. The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains 'Save and Close', a printer icon, a paperclip icon, a red flag icon, a yellow diamond icon, a globe icon, and a 'Superset' button. Below the toolbar are tabs for 'General', 'Details', 'Activities', 'Certificates', and 'All Fields'. The 'General' tab is active. The contact information is organized into sections: 'Full Name...' (John Sims), 'Job title:' (Account Manager), 'Company:' (ZCorp), 'File as:' (Sims, John), 'Address...' (123 First St., Actonville, MD, USA), 'Business' (checked), 'E-mail' (jsims@company.com), 'Display as:' (John Sims (jsims@zcorp.com)), 'Web page address:', and 'IM address:'. There is a checkbox for 'This is the mailing address' which is checked. The 'Superset' button is highlighted in the toolbar.

2. If you wish to return the call, click the **Superset** button in the tools bar.  
A window is displayed which lists all the telephone numbers in your caller's Contact window.
3. Select the number you wish to dial.
4. Select **Dial**.

## Using Journal Entry window in Microsoft Outlook

If the Journal Entry window is displayed on your workstation, use the following procedure to view caller information and to time your call.

1. Using standard Microsoft Outlook procedures, update the information in this Journal Entry window.

**Figure 5-8 Journal Entry window in Microsoft Outlook**

**Incoming Calls - Journal Entry**

File Edit View Insert Format Tools Actions Help

Save and Close Print Cut Copy Paste Undo Redo

Subject: Incoming Calls

Entry type: Phone call

Start time: Tue 11/19/2002 8:19 AM Start Timer

Duration: 1 minute Pause Timer

New Call: Tuesday November 19, 2002 08:19:24  
 Number Dialed = 5555551  
 Caller's Telephone Number = 6103611164  
 Caller's Name = John  
 Caller's First Name = John  
 Caller's Middle Name =  
 Caller's Last Name = Sims  
 Call Delivered to Agent 5201  
 Call Delivered to Extension 5007

Contacts... John Sims

2. To start the timer, select 'Start Timer'.  
If you wish to pause the timer, select 'Pause Timer'. The timer is stopped when you exit this window.
3. Add additional information to this journal by entering text below the last line.
4. Save this journal entry by selecting **Save** from the File menu.

## Troubleshooting

The following table includes a set of possible error messages, their meaning and the actions you can take to resolve the problem.

**Table 5-1:**

<b>Error message</b>	<b>Meaning</b>	<b>Actions</b>
Server Invoked Logout	<ul style="list-style-type: none"> <li>• Connection to MiTAI was lost</li> <li>• Administrator logged you out of Agent Portal</li> </ul>	When advised by administrator, log back in to Agent Portal Client using the procedures in “Logging in to Agent Portal Client” on page 47.
Agent ‘x’ at extension ‘y’ cannot be monitored	Extension cannot be monitored	Contact administration to verify that the extension is a type that can be monitored.
Agent ‘x’ at extension ‘y’ cannot be monitored [invalid device]	Extension cannot be monitored	Contact administration to verify that the extension is a type that can be monitored.
Login of Agent ‘x’ at extension ‘y’ could not be confirmed	Agent ID may currently be in use	Verify that the Agent ID you have entered is valid
Login of Agent at extension ‘y’ could not be confirmed (similar to previous error messages)	Agent ID was not entered in Login window	<ul style="list-style-type: none"> <li>• If you do not need the Agent Portal ACD, disregard message</li> <li>• If you wish to use Agent Portal ACD, enter your Agent ID.</li> </ul>
Error connecting to Agent Portal Server [server_name]	Cannot connect to the server identified in your Login window because: <ul style="list-style-type: none"> <li>• incorrect entry of server</li> <li>• server is not running</li> </ul>	<ul style="list-style-type: none"> <li>• Verify correct entry of server name in Login window</li> <li>• Contact administrator to determine if server is running</li> </ul>
Unable to make a call to ‘extension #’ [Invalid device specified]	An invalid number was entered in the ‘Make a Call’ window	Verify that you have entered the correct number