STAREL CMC
Agent Interface
Express Guide
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**Basic Agent Interface Functionality**

**Launch Agent Interface**
1. On the Agent computer desktop, locate the Agent Interface icon.
2. Double click the Agent Interface icon.
3. In the Agent ID field, enter the Agent’s ID.
4. In the Password field, enter the User’s password.
5. Confirm that you are connecting to the correct database. Typically, this is STLNTDB.
6. Confirm that you are connecting to the correct position number.
   a. If needed, you can enter -1 to connect to an unlicensed station with only view capability. Telephony and Dispatching are not enabled when logged in as position -1.
7. Click the OK button.

**Launch Administrative Controls**
1. On the Agent computer desktop, locate the Administrative Controls icon.
2. Double click the Administrative Controls icon.
3. In the Agent ID field, enter the Agent’s ID.
4. In the Password field, enter the Agent’s password.
5. Confirm that you are connecting to the correct database. Typically, this is STLNTDB.
6. Click the OK button.

**Login to Agent Interface** (If Agent Interface is open, but logged out)
1. On the Agent Interface Toolbar, click File.
2. In the drop down menu, click Login.
3. In the Agent ID field, enter the Agent’s ID.
4. In the Password field, enter the Agent’s Password.
5. Click the OK button.

**To go into Call Rotation using the Startel Soft Switch**
1. While Logged into Agent Interface
2. Press the **OUT/IN** key on the keyboard

**To go out of Call Rotation using the Startel Soft Switch**
1. While Logged into Agent Interface
2. Press the **Shift+OUT/IN** keys on the keyboard

**To Logout of Agent Interface**
1. On the Agent Interface Toolbar, click File.
2. In the drop down menu, click Logout.
**Answering a call** (You must be in rotation to answer calls)

1. Press the **ANSR/FLASH** key

**Releasing a call**

2. Press the **RELEASE** key

**Check into a Client if Client ID is known**

1. Press the **NEXT CALL** key.
2. Press the **CHECK IN** key.
3. At the Client ID: prompt, enter the Client ID.
4. Press the **Enter** key.

**Check into a Client if the Client ID is unknown**

1. Press the **NEXT CALL** key.
2. Press the **CHECK IN** key.
3. At the Client ID: prompt, enter the first few letters of the client name.
4. Press the **Enter** key to access the directory.
5. Use the mouse or the arrow keys to select correct entry.
6. Press the **Enter** key.

**View previously accessed Clients**

1. Press the **NEXT CALL** key.
2. Press the **PREV** key.
   
   Note: Repeat these steps to view the previous 10 Clients accessed. You must first clear incompletes before being able to access this information.

**View Additional Mastercard Pages**

1. With a Client displayed, Press the **MSTRCARD** key.
2. Press the **NEXT/PREV** key
   
   Note: If Mastercard pages are indexed press the number of the Mastercard page you want to view first, then use the **PREV/NEXT** keys to navigate to different Mastercards.
3. Press the **CHECK IN** key to re-index Mastercard pages if desired.
Entering Messages, Ifs and Locates

Take a Message for a Client with a single Message form and no Members
1. Press the ANSR key.
2. Fill in the Message form.
3. Follow Client specific instructions.
4. Press the RELEASE key.
5. Press the SAVE/DLVR key as required.
6. Press the NEXT CALL key.

Take a Message for a Client with multiple Message forms
1. Press the ANSR key.
2. Press the number that corresponds with the desired Message form.
3. Fill in the Message form.
4. Follow Client specific instructions.
5. Press the RELEASE key.
6. Press the SAVE/DLVR key as required.
7. Press the NEXT CALL key.

Take a Message for a Client with multiple Members
1. Press the ANSR key.
2. Press the number that corresponds with the desired Member.
3. Fill in the Message form.
4. Follow Member specific instructions.
5. Press the RELEASE key.
6. Press the SAVE/DLVR key as required.
7. Press the NEXT CALL key.

Select a different Member/Message form, if an incorrect Member/Message form was chosen
1. Before typing in the Message form, press the CHECK IN key.
2. Press the ENTER key.
3. Press the number that corresponds with the desired Member/Message form.

To enter a new Message, If or Locate while viewing a Client
1. Press the MSG, IF, or LOC key.
2. Press the ENTER key.
3. Type the information to be displayed in the If/Locate or Message to be saved.
4. Press the SAVE key.

*Note: Windows “Copy, Cut, and Paste” are available to you for use in these quadrants.*
Deliver a Message, If or Locate
1. Press the MSG, IF or LOC key
2. Press the number of the item to be delivered.
   Note: If items are not indexed, press CHECK IN to index.
3. Press the DLVR key.
4. At the Client Initial prompt, type who/why the message was delivered.
5. Press the Enter key.

Insert a new If/Locate between two existing Ifs/Locates
1. Press the IF or LOC key.
2. Press the number of the If/Locate that you would like to insert the new If/Locate above.
3. Press the Alt+ENTER keys.
4. Type information to be displayed in the If/Locate.
5. Press the SAVE key.

View a Waiting Message, If or Locate
1. Press the MSG, IF or LOC key
2. Choose the item in that quadrant you wish to view.
   Note: If items are not indexed, press CHECK IN to index.

View a Filed Message, If or Locate
1. Press the FILED key.
2. Press the MSG, IF or LOC key
3. Choose the item in that quadrant you wish to view.
   Note: If items are not indexed, press CHECK IN to index.
4. To toggle back to waiting Messages, Ifs, and Locates, press the FILED key.

Finish an Incomplete Message, If or Locate
1. Press the MSG, IF or LOC key.
2. Press the number of the incomplete Message, If or Locate to complete.
3. Complete Message, If or Locate as needed.

Duplicate a Message, If or Located
1. Press the MSG, IF or LOC key.
2. Press the number of the Message, If or Locate to duplicate.
3. Press the Shift+DUP keys.
4. A copy of the item selected will be duplicated and you will be in an editing state.
5. Press the SAVE key.
   Note: Both waiting and filed items can be duplicated.
Copy/Forward a Message, If or Locate to an additional Client

1. Press the MSG, IF or LOC key.
2. Press the number of the Message, If or Locate to be copied/forwarded.
3. Press the Shift+MSG F keys.
4. If forward Clients have been preprogrammed, a list will appear for you to select from.
   a. If not, press the Shift+* keys
   b. At the Client ID: prompt, enter the client to copy this message too.
   c. Press the Enter key.

   Note: This Message/If/Locate is now waiting on the Client that you designated.

Display Message Activity Trace (MAT)

1. Press the MSG key
2. Press the number of the Message to display activity on.
   Note: If items are not indexed, press the CHECK IN key to index.
3. Press the ACT TRACE key.
4. Press the NEXT/PREV key to view additional pages of activity.
**Macros**

Macros enable an Agent to perform multiple keystrokes using hotkeys. Macros can be programmed specifically for a client or for use system wide.

**Initiate a Macro**

1. Press the **Macro** key.
2. Click the Client or System Tab.
   
   *Note: If you are in a Client, the Client tab will display by default. If you are not in a Client, the System tab will display by default.*
3. Press the appropriate character for the Marco you would like to initiate.
Directories

Display a Client’s default directory
1. While viewing a Client, press the Alt+D keys.
2. Press the Esc key to close the directory window.

Navigate within a Directory
1. Use the up/down arrow keys to make a selection.
   
   Note: Directory must be displayed first.
2. Entries are displayed in groups of 100. If you need to see additional entries, use the green up/down arrow buttons on the tool bar to display the next group of entries.

Query the Directory
1. With the directory displayed, Click on the Query button on the tool bar.
2. In any value, type the data you would like to Query for in the Directory.
3. Click the OK button.
4. The Directory will now display any entries that match your Query.

To dial from a Directory
1. With the directory displayed, Click on the number you wish to dial.
2. Press the XFER or SUP XFER key to dial.

Add an entry to a directory
1. Display Client’s directory.
2. Click the Add Row button on the tool bar.
3. Add information for new entry.
4. Click OK button.

Edit an entry in a directory
1. Display Client’s Directory.
2. Double click on the entry to edit.
3. Make desired changes.
4. Click OK button.

Delete an entry in a directory
1. Display Client’s Directory.
2. Click the row to be deleted.
3. Click the Delete Row button on the tool bar.
4. You will be prompted with “Delete the selected entry?”
5. Click Yes button to confirm deletion
Import information from a Directory to a Message form

1. On the appropriate value, press the Alt+Enter keys to display the associated directory.
   
   *Note: You can type a portion of what you are looking for, before pressing Alt+Enter, filter the items that will be displayed.*

2. Select the directory entry to be imported.

3. Press the Enter key.

Close a Directory

1. Press the Esc key.

   Or...

1. Click Directory on the tool bar.
2. Click Close.
Actions

Process a Message Action

*Message Actions are set by an Administrator. These actions are set to queue at a specific time and will display a string of text instructing you to perform a task.*

1. Press the **NEXT CALL** key.
2. Press the **ACTN** key.
3. Press the number for Message Action.
4. The next Message in the Message Action queue will be presented to you.
5. Follow instructions in the message that is displayed.

Process a Phone Action

*Phone Dispatch Actions are generated by Auto Dispatch Scripts. An Auto Dispatch Script is a preprogrammed set of steps that will occur when a Message is saved.*

1. Press the **NEXT CALL** key.
2. Press the **ACTN** key.
3. Press the number for Phone Dispatch Action.
4. The next Message in the Phone Dispatch Action queue will be presented to you.
5. At the Phone Number: prompt, you will see the number to be dialed is displayed.
6. Press the **Enter** key.
   a. If you are able to give the message to the called individual;
      i. At the Comment: prompt, document that you gave out the message.
      ii. Press the **SAVE/DLVR** key as required.
   b. If you are not able to give the message to the called individual;
      i. At the Comment: prompt, document that you were unable to give out the message.
      ii. Press the **SAVE** key.

*Note: Because this type of action is part of a Dispatch Script, the system will continue to dispatch this message.*

Process a Time Delay Action

*Time delay actions are time delayed reminders set by Agents on messages. These reminders will be queued in the Time Delay Action queue to remind Agents to continue dispatching a message.*

1. Press the **NEXT CALL** key.
2. Press the **ACTN** key.
3. Press the number for Time Delay Actions.
4. The next Message in the Time Delay Action queue will be presented to you.
5. Press the **ACT TRACE** key to display the Message Activity Trace.
6. Follow instructions on the client to continue dispatching.
Set a Time Delay Action on a Message Form

1. While editing a Message, press the ACTN key.
2. At the Enter Delay prompt, press the Enter key to except the default Time Delay or enter an alternative time and press the Enter key.
   
   Note: At the end of the time frame specified, a reminder will be queued as a Time Delay Action in the Action queue.

Process an Email Response Action

Email Response Actions are generated by an incoming Email from Clients. If a client, that has Email Response enabled, replies to an email that an Agent sent an action with the email attached will be queued in the Email Response Action queue.

1. Press the NEXT CALL key.
2. Press the ACTN key.
3. Press the number for Email Response Action.
4. The next Message in the Email Response Action queue will be presented to you.
5. Read and respond to Email received.

Process a Check Action

Check Actions are set by an Administrator. These actions are set to queue at a specific time and will display a string of text instructing you to perform a task if there are messages waiting on the client for whom the action is configured.

1. Press the NEXT CALL key.
2. Press the ACTN key.
3. Press the number for Check Action.
4. The next Message in the Check Action queue will be presented to you.
5. Follow instructions in the message that is displayed.

Process a System Notify Action

System Actions are generated by a system event. These actions are generated to notify you have a System event that needs attention.

1. Press the NEXT CALL key.
2. Press the ACTN key.
3. Press the number for System Notify Action.
4. The next Message in the System Notify Action queue will be presented to you.
5. Read and respond to the Action.
Process a Dispatch Error Action

Dispatch Error Actions are generated by a failure of a dispatch attempt. These actions are generated to notify you that an email, page, fax, sms, etc... has failed.

1. Press the NEXT CALL key.
2. Press the ACTN key.
3. Press the number for Dispatch Error Action.
4. The next Message in the Dispatch Error Action queue will be presented to you.
5. Read and respond to the Action.

Process a SM Response Action

SM Response Actions are generated by an incoming SM from Clients. If a client replies to a SMS message that an Agent sent, an action with the message sent be queued in the SM Response Action queue.

1. Press the NEXT CALL key.
2. Press the ACTN key.
3. Press the number for SM Response Action.
4. The next Message in the SM Response Action queue will be presented to you.
5. Read and respond to SMS received.
Dispatching a Message to a device

To view available dispatch devices
1. If you are viewing a Client and have not selected a Member, press the DISP INFO key to view Client dispatch devices.
2. If you have selected a Member in a Client, press the DISP INFO key to view the Members dispatch devices.

To send a Fax Message
1. Press the MSG key.
2. Press the number of the Message to be Fax.
3. Press the Ctrl+F keys.
4. Press the number of the Fax device the Message is to be sent to.
   Note: If you need to send to a device that is not listed, press the Shift+* keys. When prompted, enter the alternative device to send to and press the Enter key.
5. At the Comment prompt, type a comment as to why we are sending this message.
6. Press the Enter key.
7. If there is a default action delay, set the delay time and press the Enter key.

To send an Email Message
1. Press the MSG key.
2. Press the number of the Message to be Emailed.
3. Press the Ctrl+E keys.
4. Press the number of the Email device the Message is to be sent to.
   Note: If you need to send to a device that is not listed, press the Shift+* keys. When prompted, enter the alternative device to send to and press the Enter key.
5. At the Comment prompt, type a comment as to why we are sending this message.
6. Press the Enter key.
7. If there is a default action delay, set the delay time and press the Enter key.

To send an SMS Message
1. Press the MSG key.
2. Press the number of the Message to be sent via SMS or Numeric SMS.
3. Press the Ctrl+S keys to send SMS or Ctrl+N for Numeric SMS.
4. Press the number of the SMS device the Message is to be sent to.
5. At the Comment prompt, type a comment as to why we are sending this message.
6. Press the Enter key.
7. If there is a default action delay, set the delay time and press the Enter key.
To send an Alpha Page Message

1. Press the MSG key.
2. Press the number of the Message to be Alpha paged.
3. Press the Ctrl+A keys to send Alpha page.
4. Press the number of the Alpha device the Message is to be sent to.
   
   *Note: If you need to send to a device that is not listed, press the Shift+* keys. When prompted, enter the alternative device to send to and press the Enter key.*
5. At the Comment prompt, type a comment as to why we are sending this message.
6. Press the Enter key.
7. If there is a default action delay, set the delay time and press the Enter key.

To send a Digital Page

1. Press the MSG key.
2. Press the number of the Message associated with the digital page.
3. Press the Ctrl+D keys to send a Digital page.
4. Press the number of the Pager to be paged.
5. At the Callback Str prompt, enter the callback number to be displayed on the pager.
6. Press the Enter key.
7. At the Comment prompt, type a comment as to why we are paging this pager.
8. Press the Enter key.
9. If there is a default action delay, set the delay time and press the Enter key.
**Telephony functions**

**Dial a number while in a Client**
1. While in a Client, press the DIAL PATCH key.
2. Press the corresponding number for the phone number you wish to dial OR type an alternative phone number at the Phone Number prompt.
3. Press the Enter key.
4. When you are finished with this call, press the RELEASE key.

**Dial from any Field in a Client**
1. Select/View the specific Message/Mastercard/If/Locate where the number you wish to dial is entered.
2. Press the DIAL PATCH key.
3. Press the MSG/MSTRCARD/IF/LOC key where the number is located.
4. The first phone number available in the quadrant selected will be highlighted.
5. If you wish to dial another number in that quadrant, press the MSG/MSTRCARD/IF/LOC key until the correct number is highlighted.
6. Press the Enter key.
7. When you are finished with this call, press the RELEASE key.

**Place an individual in your Patch Hold**
1. While talking to an individual, press the DIAL PATCH key.
   *Note: This places the individual in your personal patch hold. You will see an indication that someone is in your patch hold on the 25th status line.*

**Retrieving an individual from your Patch Hold**
1. Press the DIAL PATCH key.
   *Note: You are now in a talk state with the individual that was in your personal patch hold.*

**Park a Caller**
1. While speaking to an individual and in a Client, press the PARK key.
   *Note: This places the individual on hold in the Client that you are currently viewing. Any Agent with access to this client will be able to retrieve this individual. It is important to document who is parked and why they are parked on a message.*

**Retrieve an individual that is Parked on a Client**
1. Check into the Client where the individual was Parked.
2. Press the Shift+RETRV keys.
   *Note: You are now in a talk state with the individual that was Parked. If a Parked individual is not retrieved with preprogrammed timeout, the individual will be placed into queue for the next available Agent to assist them.*
Patching two individuals together

1. Place the first individual in your Patch Hold.
2. Dial the second individual or retrieve them from Park Hold.
3. While talking to the second individual, press the DIAL PATCH key.
4. You are now talking to both individuals.
5. Announce that the individuals are connected.
6. Press the RELEASE key to connect the two individuals together.

*Note: There are many scenarios that will patch two individuals together. This is one example. You can patch two inbound calls together... two outbound calls... or an inbound and outbound call.*

Switch between the individual you are speaking to and the individual in your Patch Hold

1. While speaking to an individual press the DIAL PATCH key.
2. Reach a second individual.
3. Press the Shift+CONN TO keys. Now the second individual is in your Patch Hold and you are speaking with the first individual.
4. Press the Shift+CONN TO keys again. Now the first individual is back in your Patch Hold and you are speaking with the second individual.

Blind Transfer from Extension Client if extension is known

1. Press the ANSR key when presented with a call on an extension client.
2. At Client Extension: prompt, enter the extension number to transfer to.
3. Press the XFER key.

Blind Transfer from Extension Client if extension is not known

1. Press the ANSR key when presented with a call on an extension client.
2. At Client Extension: prompt, enter a portion of the name or department to transfer to.
3. Press the Enter key.
4. Select individual to transfer to from the displayed directory
5. Press the XFER key.

Supervisor Transfer from Extension Client if extension is known

1. Press the ANSR key when presented with a call on an extension client.
2. At Client Extension: prompt, enter the extension number to transfer to.
3. Press the SUP XFER key.
4. Announce the call
5. Press the RELEASE key.

*Note: If the line is busy, or rings with no answer, pressing the SUP XFER key again will release the dialed line and put you back in a talk state with the individual you were attempting to transfer. If the dialed individual does not wish to take the call, when they release the line, you will be but back in a talk stat with the individual you were attempting to transfer.*
Supervisor Transfer from Extension Client if extension is not known

1. Press the **ANSR** key when presented with a call on an extension client.
2. At Client Extension: prompt, enter a portion of the name or department to transfer to.
3. Press the **Enter** key.
4. Select individual to transfer to from the displayed directory
5. Press the **SUP XFER** key.
6. Announce the call
7. Press the **RELEASE** key.

*Note: If the line is busy, or rings with no answer, pressing the SUP XFER key again will release the dialed line and put you back in a talk state with the individual you were attempting to transfer. If the dialed individual does not wish to take the call, when they release the line, you will be but back in a talk stat with the individual you were attempting to transfer.*
Agent established Conference call

Conference Multiple Callers (maximum of 6 callers and 1 Agent)

1. Connect with the 1st party.
2. Press the DIAL PATCH key and call the 2nd party.
3. Press the DIAL PATCH key and the 1st party, 2nd party, and you are connected.
4. Press the HOLD key to tell the system a conference call is being established.
5. Press the DIAL PATCH key and call the 3rd party.
6. Press the DIAL PATCH key and the 1st party, 2nd party, 3rd party and you are connected.
7. Press the HOLD key.
8. Press the DIAL PATCH key and call the 4th party.
9. Press the DIAL PATCH key and the 1st party, 2nd party, 3rd party, 4th party and you are connected.
10. Press the HOLD key.
11. Press the DIAL PATCH key and call the 5th party.
12. Press the DIAL PATCH key and the 1st party, 2nd party, 3rd party, 4th party, 5th party and you are connected.
13. Press the HOLD key.
14. Press the DIAL PATCH key and call the 6th party.
15. Press the DIAL PATCH key and the 1st party, 2nd party, 3rd party, 4th party, 5th party, 6th Party and you are connected.
16. Press the RELEASE key will remove yourself from the Conference and leave the 6 parties connected.

Note:

CMC OnCall Scheduling – Refer to CMC OnCall User’s Guide.

Time Activated Alerts (TAA’s) – Refer to the CMC TAA User’s Guide