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Remind Agents of Actions to Perform for Clients with Genesis Cues and Repeats

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The screenshot displays the Amtelco Soft Agent interface. At the top, the window title is "Amtelco Soft Agent". Below the title bar, there is a header for "Dr. David Darcy's Office" with a "Disc 0:56" indicator and a "F2" button. A green "Activities - Ready" notification is visible in the top right corner, with "Info - Icons" and "New message" options. The main call area shows the text "Dr. David Darcy's office. How may I help you? ." and a call status of "Incoming, Repeat - Call Dr. David Darcy's office to verify that they received their messages." A tooltip bubble is shown over the call status, containing the text "Incoming, Repeat - Call Dr. David Darcy's office to verify that they received their messages." Below the call area, there is a menu with options: "Back", "Directory", "Dispatch List", "Information", "Messages", "Navigate Browser", "OnCall", "Sandbox", "Take Message", "Dispatch List", and "Forward". A "New message" window is open, showing a "Dr David Darcy's Messaging Service" header, a "Dr. Darcy's Current Status is..." label, a "Status" field with the value "In Office", and a "Call Type" dropdown menu with options "Take Message" and "Doctor Checkin". At the bottom of the window, there are "Cancel" and "Next" buttons. A red banner at the bottom of the interface reads "New Updates to Notes of the Day! Please check...". The bottom right corner shows the agent's name "amy", station "Stn: 04", a "Ready" status with a green dot, the date "7/8/2020", and the time "4:57 PM".

Cues and Repeats have been added to Intelligent Series (IS). Supervisors and agents can enter important information when scheduling a Cue or a Repeat which will be displayed in the Call Status when the Cue or Repeat call is answered by an agent. If the screen is too narrow to display the entire message, the agent can hover the mouse over the Call Status to display the complete message in a word bubble.

Cues and Repeats can be created by an agent in Soft Agent or created by a supervisor in the IS Supervisor System Schedule.

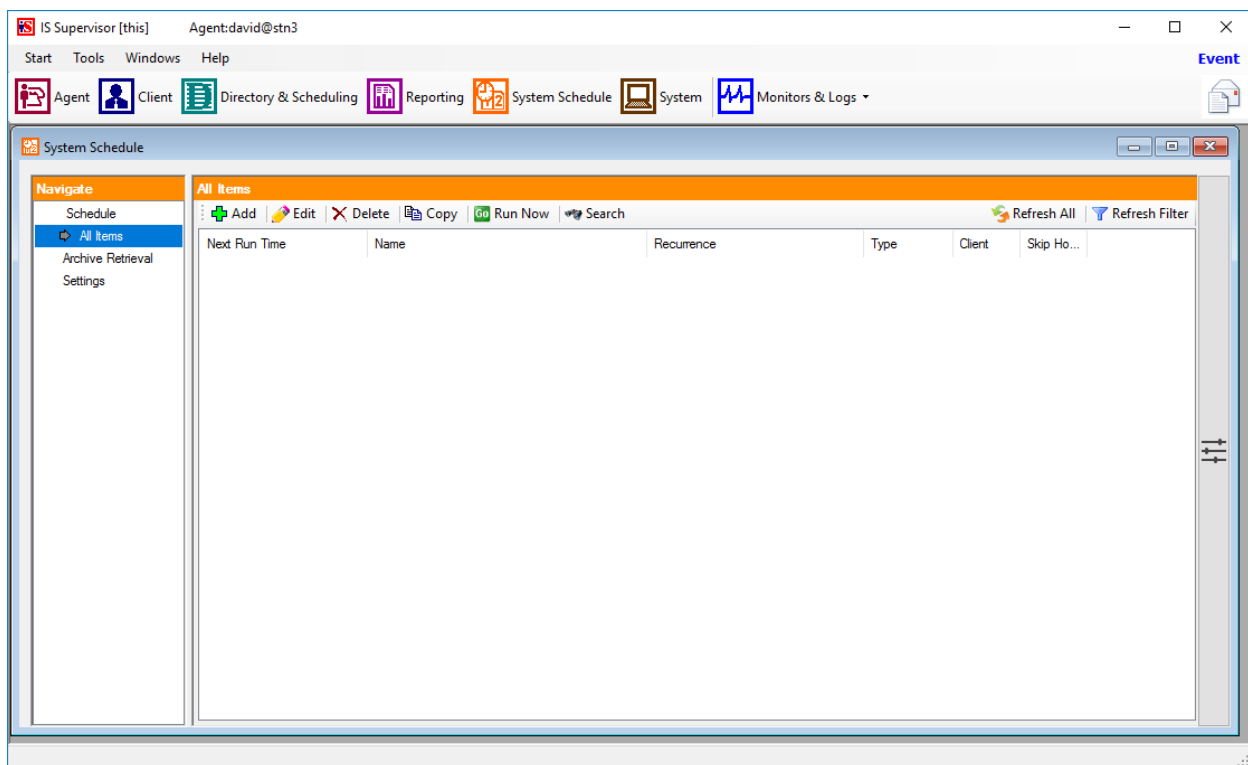
- The **Schedule Cue** action can be scheduled to create a disconnect call for a Client on an agent's screen in Soft Agent with a reminder for that agent to perform an action for that Client. Any number of Cues can be scheduled for an IS Client.
- The **Schedule Repeat** action can be scheduled to create a disconnect call for a Client on an agent's screen in Soft Agent with a reminder for that agent to perform an action for that Client. Only one Repeat can be scheduled for each IS Client. The Repeat is canceled if a checkin call comes into the Client.

Scheduling a Cue or Repeat in IS Supervisor

Cues and Repeats can be scheduled by a supervisor in the IS Supervisor System Schedule. Like other System Schedule actions, Cues and Repeats can be scheduled to run once or to recur daily, weekly, monthly, or yearly at specified days and times.

Click the System Schedule icon on the IS Supervisor Toolbar to open the System Schedule.

The System Schedule window opens to the All Items screen, which is blank until refreshed.



To schedule a Cue or a Repeat, click the Add icon  in the All Items toolbar.

The Schedule Item window is displayed.

Action

The Action menu determines the type of task that is scheduled.

- **To schedule a Cue, open the Action menu and select "Schedule Cue."**
- **To schedule a Repeat, open the Action menu and select "Schedule Repeat."**

The Parameters pane displays settings based on the selected action.

(1) Parameters

Action: Schedule Cue

(1) Parameters

Agent: None

Client: 7115552075 - Midwest Heating & Air Conditioning

Comment: Check for undelivered messages

Don't Seek

(2) Scheduling

Recurs: Weekly

Runs: Every Week

Beginning: 8:00 AM 7/10/2020

Click on days to toggle selection.

Selected Days of Week						
S	M	T	W	T	F	S
X	X	X	X	X	X	X
X	X	X	X	X	X	X
X	X	X	X	X	X	X
X	X	X	X	X	X	X

OK Cancel

Agent

The name of the agent to which IS will send the Cue or Repeat.

Use the drop-down menu to select an agent to which the Cue or Repeat should be assigned.

Client

The Client button is used to select a Client to associate with the Cue or Repeat.

Click the Client button.

The Select Client window is displayed.

Select the Client to display when the agent answers the Cue or Repeat.

Comment

The Comment box is used to tell the agent that was assigned the Cue or Repeat what action needs to be performed for the specified Client. The Comment will be displayed in the call line when the agent answers the Cue or Repeat.

Type the actions the agent must perform for the Client.

Don't Seek

If the "Don't Seek" check box is selected, IS ignores the Agent parameter and assigns the Cue or Repeat to any available agent.

- Select the “Don’t Seek” check box to ignore the Agent parameter and assign the Cue or Repeat to any available agent.
- Clear this check box to assign the Cue or Repeat to the agent specified in the Agent parameter.

(2) Scheduling

Use the settings on the Scheduling pane to specify when the selected action will take place.

More information about the Scheduling pane is provided in the “System Schedule” section of the *Intelligent Series Supervisor Reference Guide*.

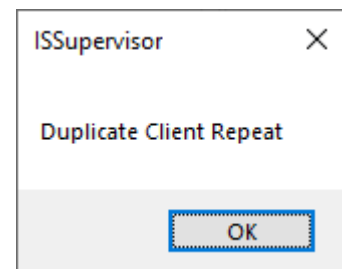
When you are finished, click the OK button to schedule the task.

Cues appear to an agent as a disconnect call. When an agent answers the call, “Incoming, Cue –” and the text in the Comment parameter is displayed in the call line. Multiple Cues can be scheduled at a time for a single Client. The current Cue does not need to be deleted in order for a new Cue to be scheduled for that Client.

Repeats appear to an agent as a disconnect call. When an agent answers the call, “Incoming, Repeat –” and the text in the Comment parameter is displayed to the agent in the call line.

Note: Only one Repeat can be scheduled at a time for each Client. The Repeat is canceled if a checkin call comes into the Client. If you attempt to schedule a Repeat for a Client that already has a schedule Repeat, the message “Duplicate Client Repeat” is displayed.

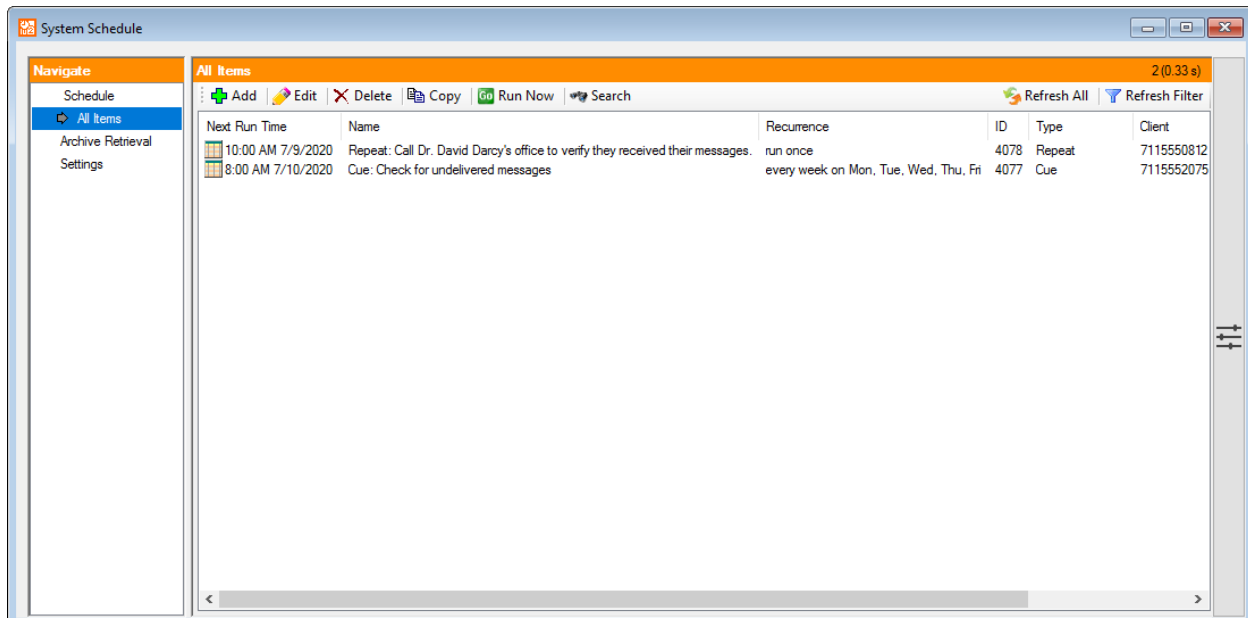
Click OK to close the message window. The current Repeat must be deleted before a new Repeat can be scheduled for that Client. Repeats can be deleted from the All Items screen.



Checking the Schedule

Scheduled Cues and Repeats are displayed on the All Items page of the System Schedule.

To load all of the tasks in the All Items page, select the Refresh All icon. 🔄



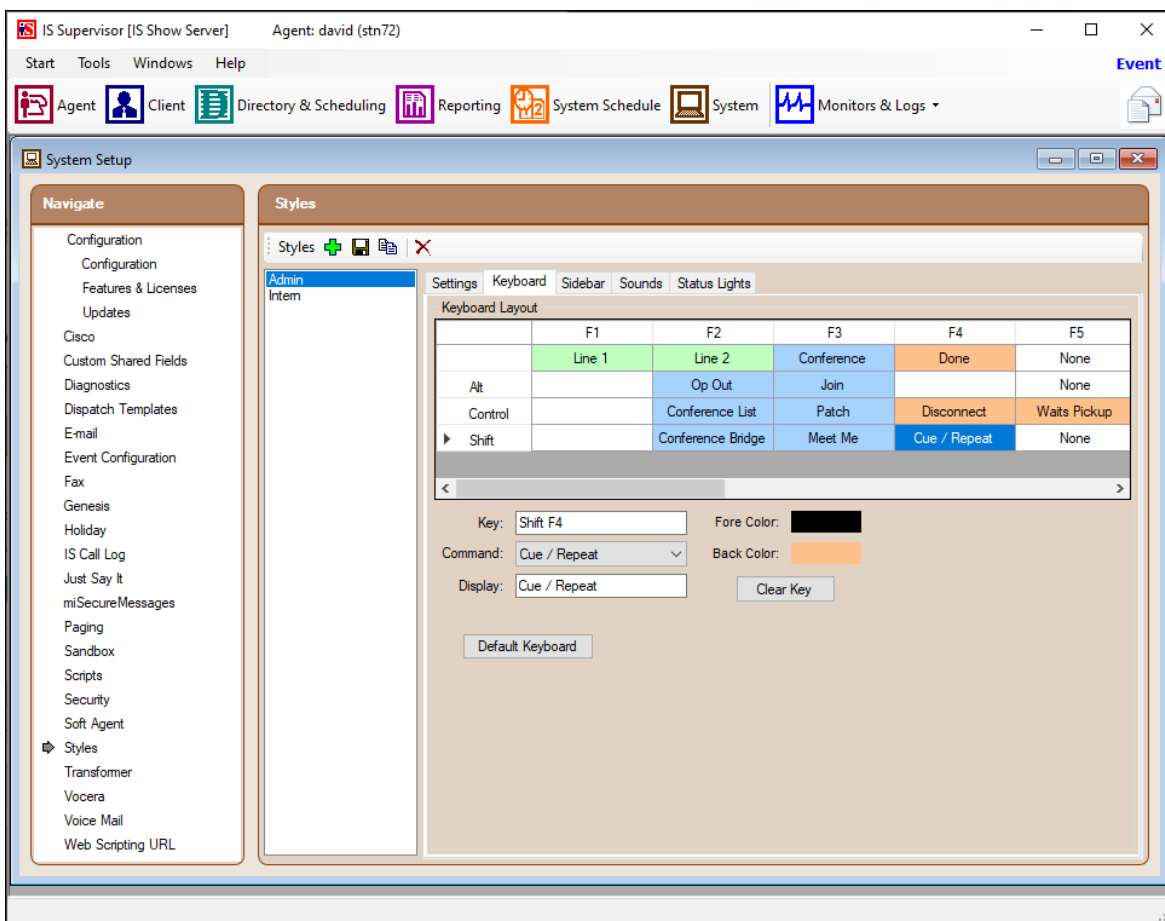
- The Next Run Time column shows the date and time when the task will run next.
- The Name column displays the text, “Cue:” or “Repeat:” followed by the comment.
- The Recursion column specifies how often the task will be run.
- The Type column displays “Cue” or “Repeat.”

Configuring the Cue/Repeat Command

In Soft Agent, Cues and Repeats are scheduled using the Cue/Repeat keyboard command.

Styles

Soft Agent version 5.4.7065.50 and later uses the keyboard commands configured on the Styles page of IS Supervisor System Setup.



To edit a Style, select the name of the Style from the Styles list.

The settings for that Style are displayed.

Click the Keyboard tab.

The Keyboard Layout table is displayed.

Key

The Key field shows the key or key combination that is currently selected in the Keyboard Layout table.

In the **Keyboard Layout** table, select the cell that represents the key or key combination that you want to assign.

Command

The **Command** menu displays the commands available to assign to a key or key combination.

Open the Command menu and select “Cue/Repeat.”

Display

The **Display** box is used to give a custom name to a command.

If you want to use a different label for the command, enter the label as you want it to appear on the Keyboard Layout.

Fore Color

The **Fore Color** is the color of the **Display** text that will be used for this key or key combination in the keyboard layout display.

Click the Fore Color box and use the color palette to choose a color for the text.

Back Color

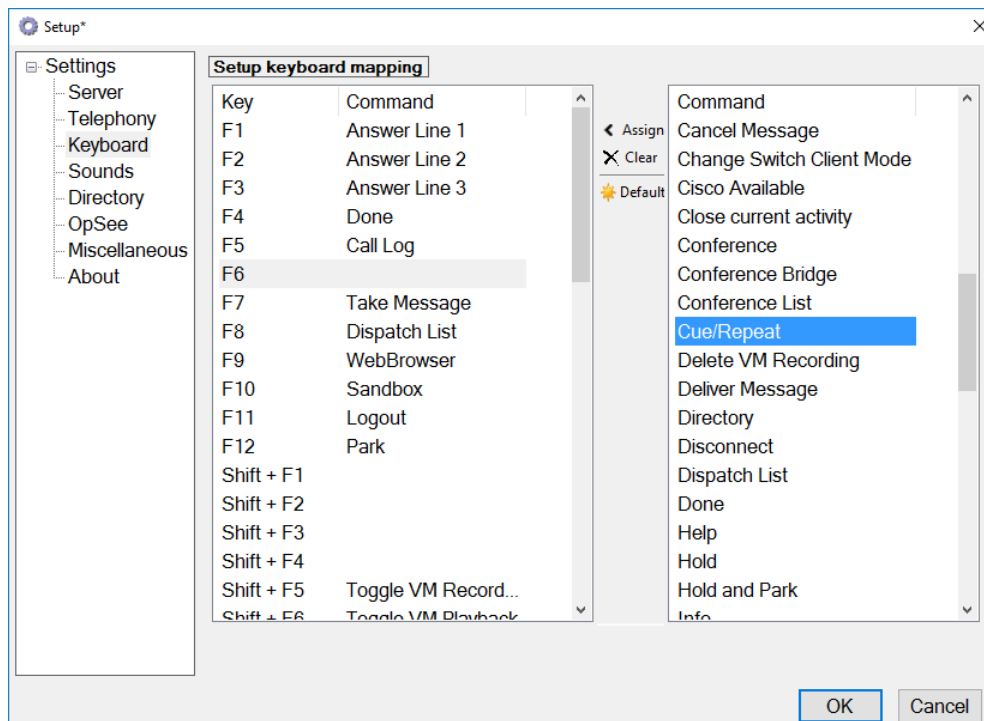
The **Back Color** is the background color that will be used in the cell for this key or key combination in the keyboard layout display.

Click the Back Color box and use the color palette to choose a color for the cell.

Click the Save icon  on the Styles Toolbar to save your changes.

Soft Agent Setup

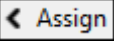
In older versions of Soft Agent, keyboard commands are configured on the **Keyboard** page of Soft Agent Setup.



To open Soft Agent Setup, press the Ctrl+F12 keys at the Soft Agent Login screen.

Click the **Keyboard** command in the **Settings** menu to display the **Keyboard Setup** screen.

To assign the Cue/Repeat command to a keyboard shortcut,

1. Click the key or key combination you want to assign in the key menu.
2. Click the Cue/Repeat command in the Command menu.
3. Click the Assign icon  to make the desired assignment.

The newly assigned Cue/Repeat command is displayed next to the assigned key or key combination in the Command column of the Key menu.

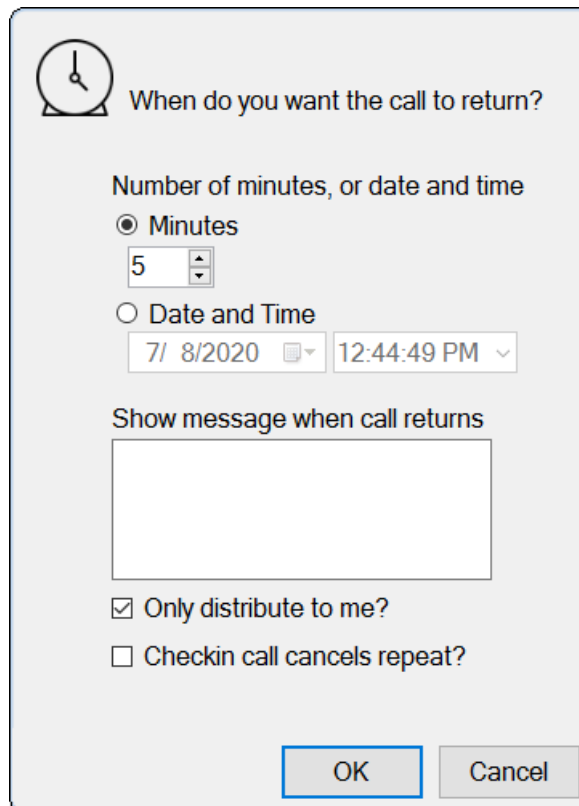
Click the **OK** button to save your changes and return to the **Soft Agent Login** screen.

Scheduling a Cue or Repeat in Soft Agent

To schedule a cue or repeat in Soft Agent, an agent must be logged into Soft Agent and have a Client account displayed on the screen.

With an IS Client on the screen, press the keyboard shortcut assigned to the Cue/Repeat command.

A screen titled “When do you want the call to return?” is displayed.



The dialog box has a clock icon and the title "When do you want the call to return?". It contains the following elements:

- A heading: "Number of minutes, or date and time"
- Two radio buttons: "Minutes" (selected) and "Date and Time".
- A numeric input field with the value "5" and up/down arrows.
- Two date/time input fields: "7/ 8/2020" and "12:44:49 PM".
- A text area labeled "Show message when call returns".
- Two checkboxes: "Only distribute to me?" (checked) and "Checkin call cancels repeat?" (unchecked).
- Two buttons at the bottom: "OK" and "Cancel".

Number of minutes, or date and time

A Cue or Repeat can be set to come due a number of minutes from now or at a specified date and time.

- Minutes

To set a Cue or Repeat for a number of minutes from now, select the **Minutes** option.

Type or use the arrow buttons to select the number of minutes from now that the Cue or Repeat should be due.

Date and Time

To set a Cue or Repeat for a specific date and time, select the Date and Time option.

Type or click the calendar icon to select a date.

Type or use the drop menu to select a time.

Show message when call returns

The text in the “Show message when call returns” field will be displayed in the Call Status when an agent answers the Cue or Repeat.

Type the instructions to display to the agent when the Cue or Repeat comes due.

Only distribute to me?

The “Only distribute to me?” check box determines if the Cue or Repeat is distributed to you or is distributed to the first agent that is available when the Cue or Repeat comes due.

Select this check box if you want the Cue or Repeat to be distributed to you.

OR

Clear this check box if you want the Cue or Repeat to be distributed to the first available agent.

Checkin call cancels Repeat?

The “Checkin call cancels Repeat?” check box determines if a Repeat is created that will be canceled if a check-in call comes into this IS Client, or a Cue is created that is not affected by check-in calls.

Select this check box to create a Repeat that will be canceled if a check-in call comes into this IS Client.

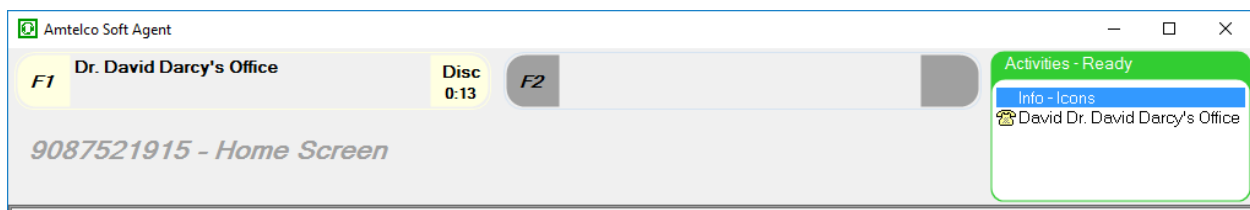
OR

Clear this check box to create a Cue that will not be canceled by check-in calls.

When you are finished configuring the settings, click the OK button to schedule the Cue or Repeat.

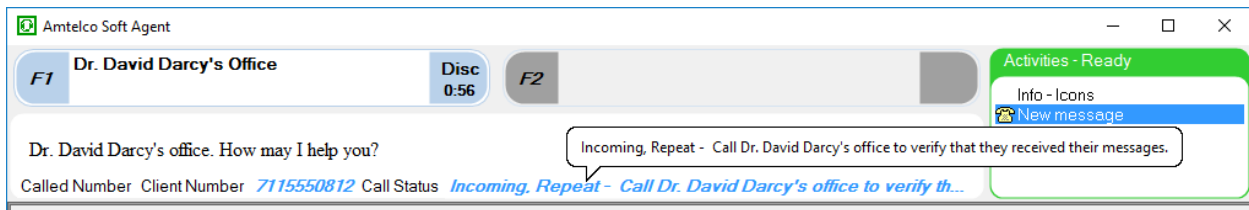
Answering a Cue or Repeat

When a Cue is distributed to an agent, it is displayed on one of the agent’s call lines as a call in the Disc (Disconnect) state.



Press the appropriate Line # keyboard shortcut or clicking the call line.

The Call Status field displays the text “Incoming, Repeat –“ or “Incoming, Cue –“ followed by the message. If the screen is too narrow to display the entire message, the agent can hover the mouse over the Call Status to display the complete message in a word bubble.



When you have completed whatever action is indicated by the Cue or Repeat, press the Done keyboard shortcut to remove the Cue or Repeat.

Requirements:

- IS Server 5.4 or later
- IS Supervisor 5.4.7065.01 or later
- IS Messaging
- 64-bit Microsoft Windows Server 2012 R2 or later
- SQL Server 2014 Standard Edition or later
- .NET Framework 4.5
- Crystal Reports 2008
- Genesis 4.6.13 or later
- 64-bit Ubuntu 16.04.2 or later Genesis Server
- Soft Agent 5.4.7065.01 or later