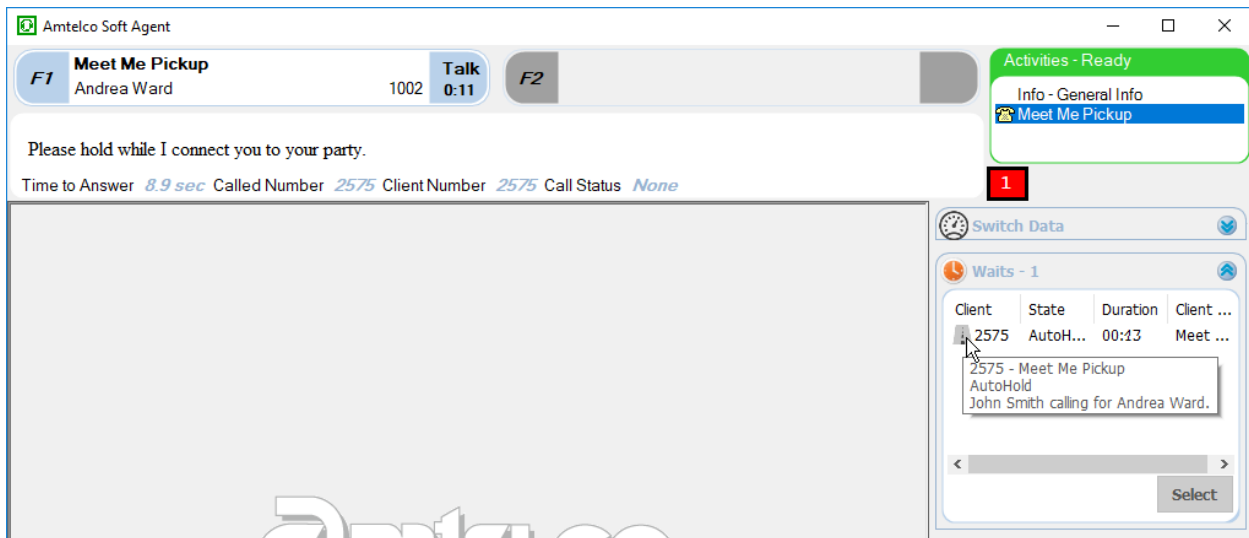


Genesis Meet Me Park

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The Genesis Meet Me Park feature allows agents to park a call to a special ACD Skill to await a callback from a client. After parking the call, the agent pages the requested client and provides an extension that can be used to call back to the account where the call is parked. When the client calls in to the extension, agents can use the Meet-Me Conferencing command to pull the call out of waits and connect the two parties. The Park response element and the Meet Me Park behavior can be used to automate the process.

Meet Me Park is implemented using client accounts set up for individual callback extensions. The agent changes to one of these accounts before parking the call to an ACD Skill that is configured for Manual Distribution. When the agent parks the call manually, the agent is prompted to enter a Park Message that provides information about the call. When a script parks the call, the script provides the Park Message. The parked call is displayed in the Waits List with a special Park icon. 🗼

After parking the call, the agent pages the client. The agent includes the callback extension in the page. This callback extension is the source number assigned to the client account.

When the client calls the callback extension, an agent can view the Park Message for the parked calls in the Waits List. After selecting the correct call from Waits, the agent can use the Meet-Me Conferencing keyboard command to join the client to the caller. If the client account is configured for the Meet Me Park behavior, the client can join a call without agent intervention.

Configuring ACD Skills

The ACD Skills page is used to create and configure Automatic Call Distribution (ACD) Skills, which determine how calls are distributed to Agent Skill Groups and stations. A special non-distribution Skill is needed to implement the Meet Me Park feature.

To open the ACD Skills page, follow these steps:

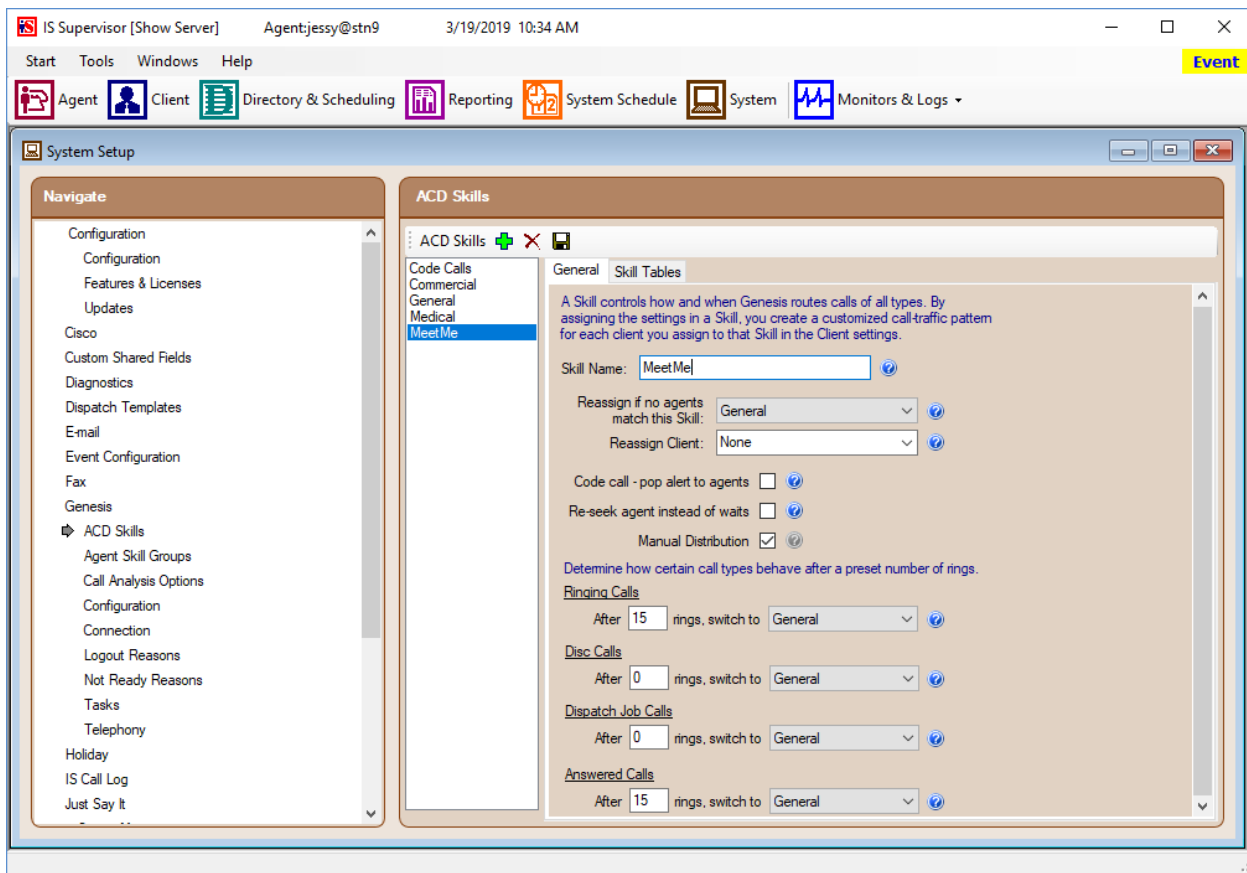
Click the System icon  on the Intelligent Series (IS) Supervisor toolbar to open the System Setup pages.

On the System Setup Navigation Menu, click the Genesis hyperlink.

Hyperlinks for the ACD Skills, Agent Skill Groups, Call Analysis Options, Configuration, Connection, Tasks, and Telephony pages are displayed.

If the ACD Skills page is not displayed, click the ACD Skills hyperlink.

The ACD Skills page is displayed.



To add a new ACD Skill, click the Add icon on the ACD Skills Toolbar. 

A new ACD Skill is created in the ACD Skills list with the name “<New Skill Name>.”

General

The General tab displays the general settings for the selected ACD Skill.

Skill Name

The Skill Name is the name used to identify this ACD Skill.


Enter a descriptive name for the ACD Skill.

Reassign if no agents match this Skill

This setting is used to reassign calls to a different Skill if there are no agents accepting calls for the current Skill.

Select a different ACD Skill to which calls should be assigned if there are no agents logged in and in the Ready state for this ACD Skill.

Manual Distribution

The Manual Distribution check box on the General tab of the System Setup ACD Skills properties is used to create a skill group for parking calls. Calls parked to an ACD Skill configured for Manual Distribution are displayed in the Waits list with the Park icon  to indicate that these calls are not be distributed to agents.

Ringling Calls

The Ringling Calls settings are used to reassign ringing calls and parked calls another ACD Skill if they are not answered in a specified number of ring counts. This setting can be used to move a call out of waits and assign it to an operator if the client does not call in within a specified amount of time. One ring count is equivalent to six seconds.

Enter the number of ring counts to wait before reassigning a parked call to another ACD Skill, and select the ACD Skill to which you want to reassign the call.

or

Enter zero (0) to disable this feature.

The rest of the settings on the General tab do not need to be configured.

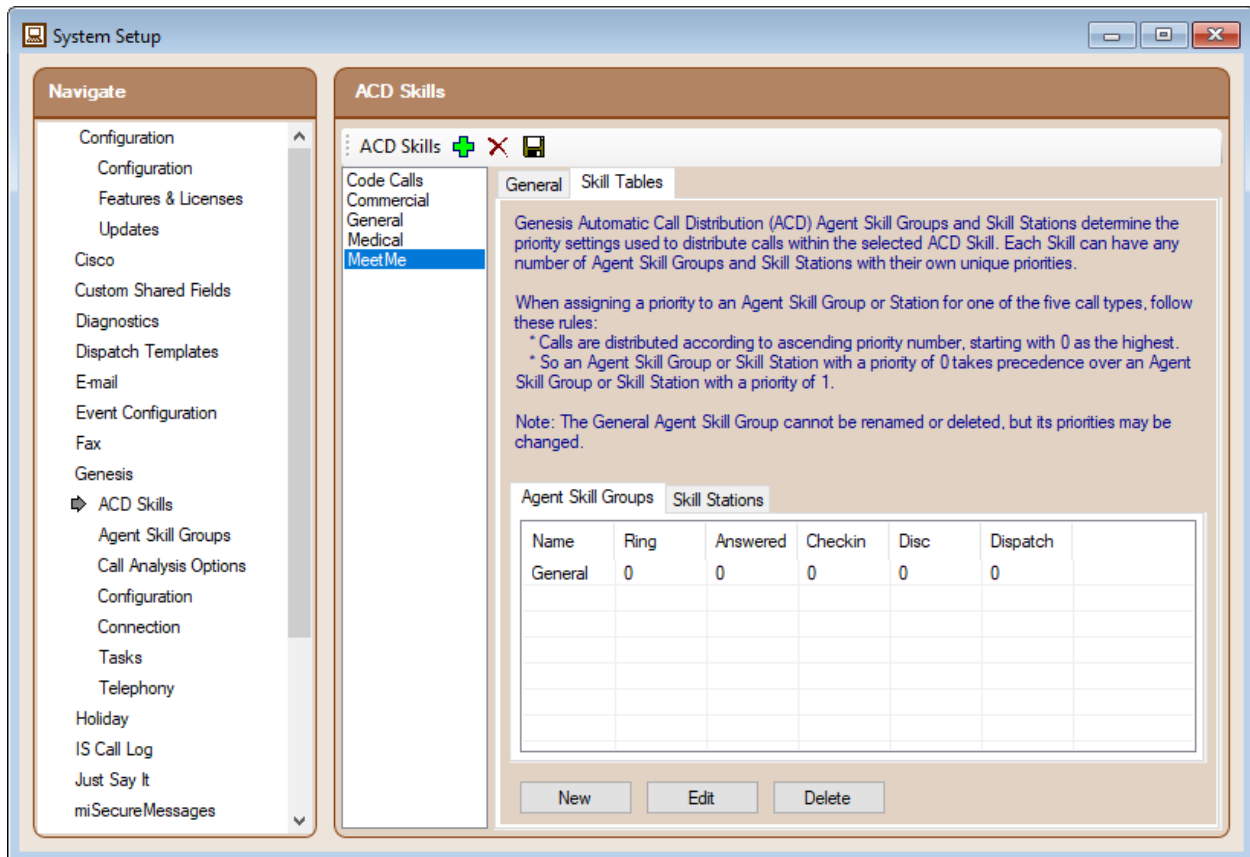
Skill Tables

The Skill Tables tab is used to configure the Agent Skill Groups and Skill Stations for the selected ACD Skill.

Click the Skill Table tab.

The Skill Tables page is displayed.

Agent Skill Groups



The Agent Skill Groups table is used to allow agents to see the parked calls in their Waits List. Only agents that are assigned to an Agent Skill Group listed in the Agent Skill Groups table will see the calls parked to this Skill.

To add a new Agent Skill Group to the selected ACD Skill Table, click the New button.

The Agent Skill Group window is displayed.

Group Name

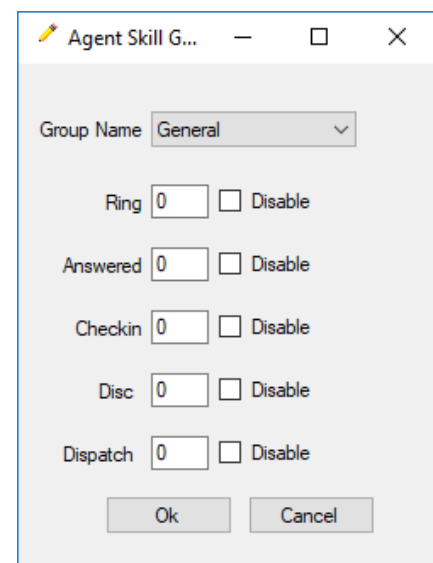
The Group Name menu is used to route calls to an agent assigned to an Agent Skill Group.

Click the Group Name menu and select the name of the Agent Skill Group that you want to add to this skill table.

The rest of the settings in the Agent Skill Group window are ignored. The Manual Distribution setting prevents the calls parked to this Skill from being distributed.

Click the Ok button to save your changes and close the Agent Skill Group window.

Click the Save icon  in the ACD Skills Toolbar to save your changes.



Configuring Client Accounts

Client Setup

Client List: 20812 - Dr David Darcy's Office

General Info

Client Setup allows you to enter the information needed to handle the calls for a particular person or account. The most basic information needed to start handling this client's calls is below.

Client Number: 20812 Assign a number to the Client. Often a Phone# or Ext#.

Client Name: Dr David Darcy's Office Billing Code: []

Answer Phrase: Dr. David Darcy's office. How may I help you?

Sources: 20812 + Add - Delete

Time Zone Offset: 0 : 00 Change Minutes Enter the difference between the system's time and the client's local time.

Save Discarded Messages Perfect Answer Select Next Undelivered Message
 IS Call Logging of Voice Hangup removes work area
 Done key cancels script Transfer conference removes work area
 Emergency Don't launch script when changing from the default account without a call

Message Purge Time: 0 days

In order to allow clients to call in to be connected with a parked call, the callback extensions need to be added as sources in the appropriate client accounts. Callback extensions can be assigned to the client accounts on which calls come in, or separate client accounts can be designated for parked calls.

Click the Client icon  on the IS Supervisor Toolbar to open the Client Setup screen.

Sources

Sources: 20812 + Add - Delete

Sources are the port numbers on which calls come into the Soft Agent application for this client. Each client should have one or more unique source numbers so that the Intelligent Series server knows which calls to route to that client account.

To add a source number, click the Add icon. 

The Add New Source window appears.

Add New Source

Enter a new source for this client.

OK Cancel

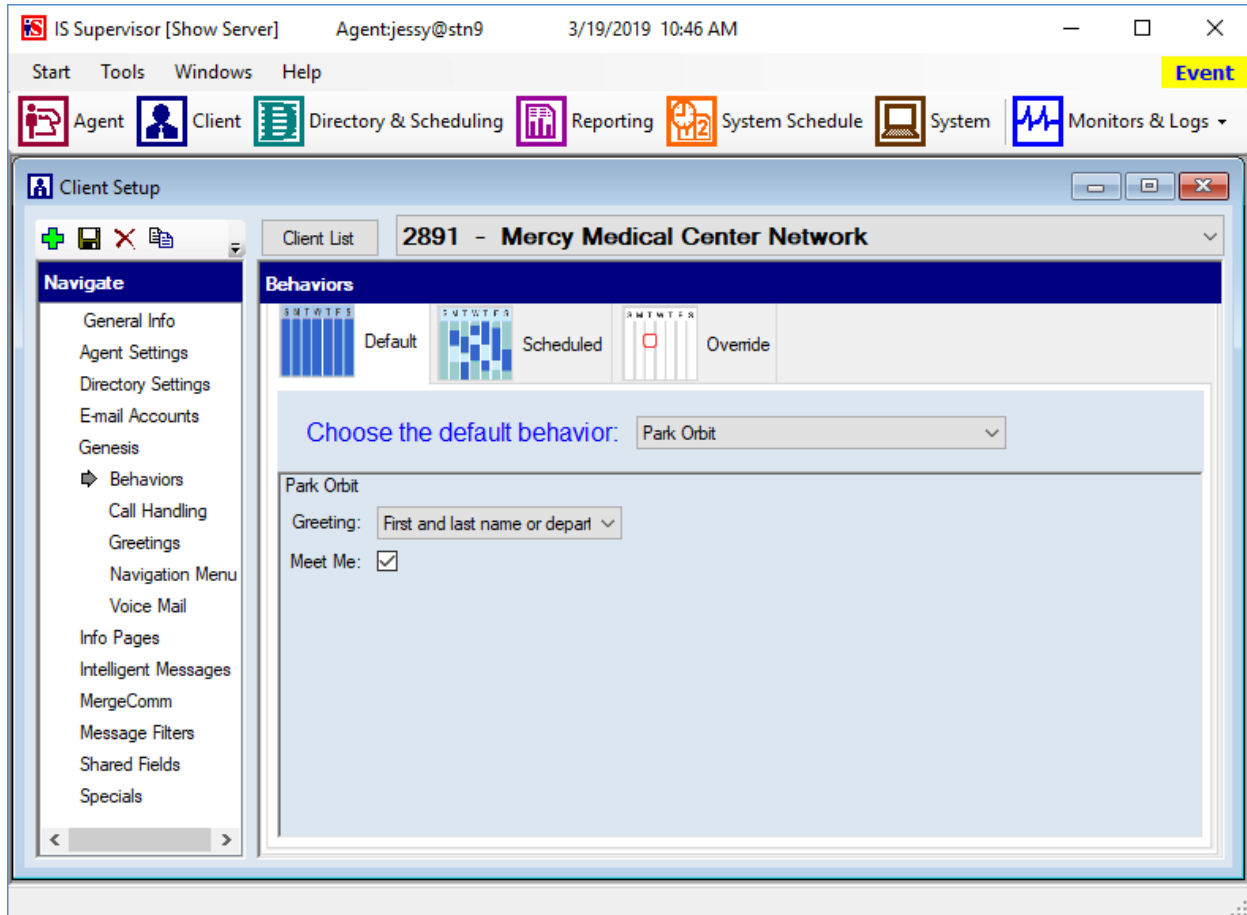
Type the callback number that you want to assign to this client. Then click the OK button.

The callback number is added to the menu of sources.

Click the Save icon  in the Client Setup Toolbar to save your changes.

Park Orbit Behavior

The Meet Me Park function is part of Park Orbit behavior.



Greeting

A recorded greeting can be played for Meet Me Park.

To play a recorded greeting, select the name of the greeting.

Greetings can be recorded and saved to IS from the Greetings page.

More information about greetings is provided in the “Client Setup” section of the *Intelligent Series Supervisor Reference Guide*.

Meet Me Park

The Meet Me Park checkbox is used to automate the process of connecting clients to parked calls. When a client calls in to a client account configured for the Meet Me Park behavior, IS Voice Services plays the optional greeting if one is configured. If there is more than one parked call for the client account, IS Voice Services announces a digit and the Park Message for each call parked for the client account. The client presses the digit associated with one of the calls to

be connected to the caller. If there is only one parked call for the client account, the client is connected to the caller automatically.

- **Select this check box to enable Meet Me Park.**
- **Clear this check box to disable Meet Me Park.**

More information about behaviors is provided in the “Client Setup” section of the *Intelligent Series Supervisor Reference Guide*.

Click the **Save icon**  in the **Client Setup Toolbar** to save your changes.

Configuring Genesis Call Slots

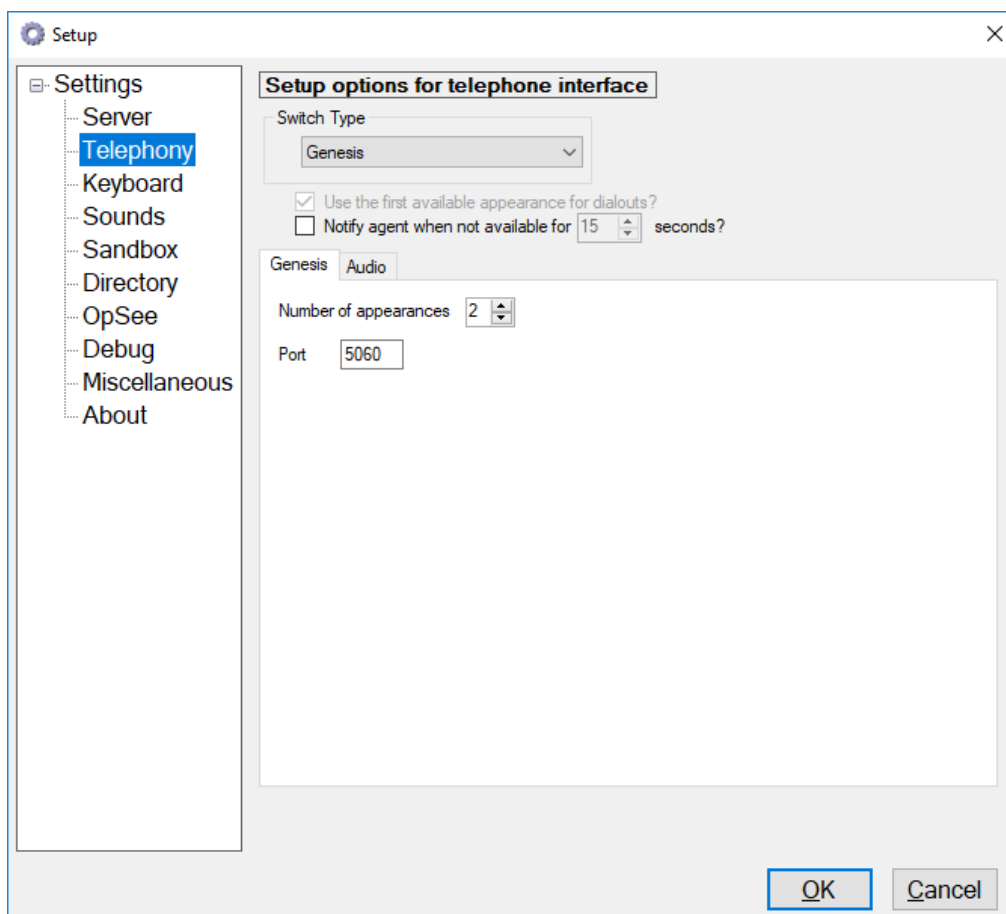
In order for agents to use the Meet-Me Conferencing command to join a caller to a client manually, the agents’ stations must be configured to use the Genesis switch with two or more call slots.

To configure Genesis call slots, press the CTRL + F12 keys at the Soft Agent Login Prompt to open the Setup window.

The Soft Agent Setup window is displayed.

Click the **Telephony** option in the **Settings Navigation Menu**.

The Telephony screen is displayed.



Switch Type

The Switch Type field is used to select the type of telephony switch used with your system.

The Genesis switch type is required to use the Genesis Meet Me Park feature. If your switch type is not Genesis, you cannot use the Meet Me Park feature.

Number of Appearances

The Number of Appearances field is used to determine the number of call lines that are available to an agent working at the workstation. A minimum of two call lines are required to use the Genesis Meet Me Park feature.

Enter the maximum number of phone lines you wish to be available at this workstation, or use the up arrow  and down arrow  buttons to navigate to the desired number. At least two call lines are required to use the Genesis Meet Me Park feature.

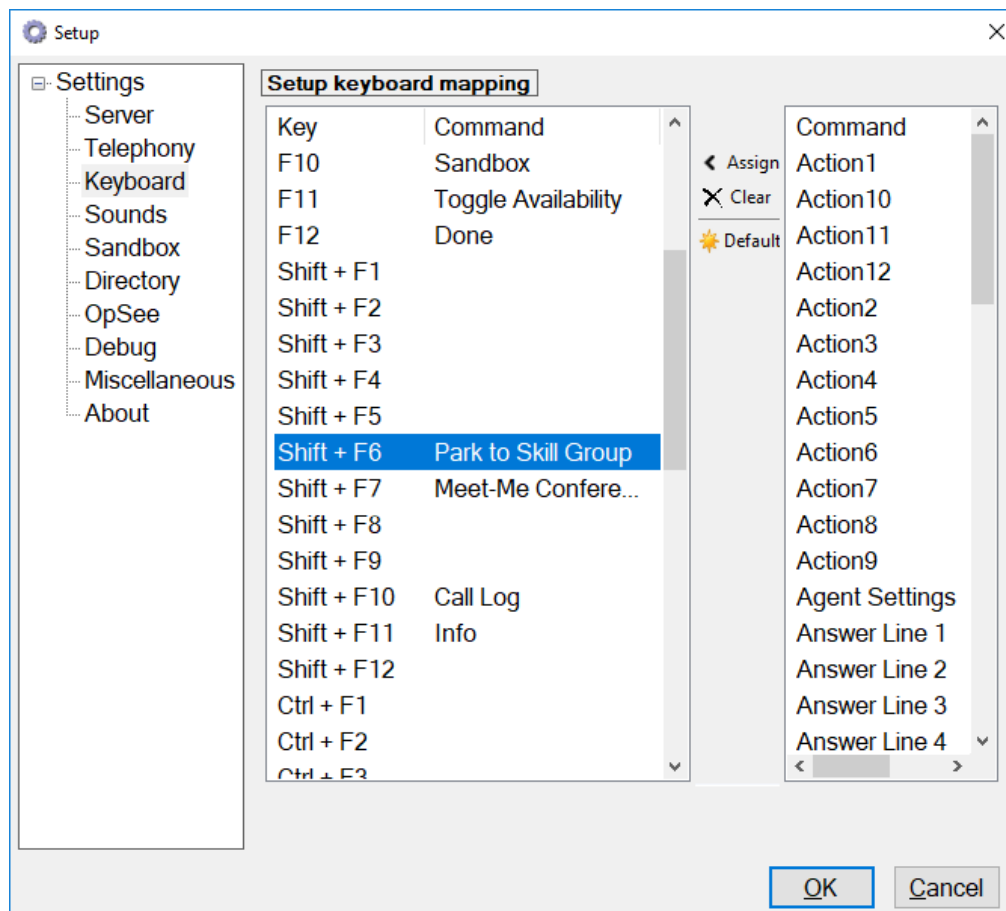
Mapping Keyboard Commands

There are two keyboard commands that are used with the Meet Me Park feature.

- The Park to Skill Group command is used to park a call to an ACD Skill to await a callback from the client.
- The Meet-Me Conferencing command is used to connect a client to a parked call.

To assign commands to Soft Agent function keys, click the Keyboard option in the Settings Navigation Menu.

The Keyboard Setup screen is displayed.



The Key menu displays the command and control keys and key combinations that are available for assignment. The Command menu displays the Actions that are available for assignment to the command and control keys.

In the Key menu, select the key or key combination that you want to use to park calls.

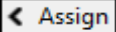
In the Command menu, select the Park to Skill Group command.

Click the Assign icon  to make the assignment.

“Park to Skill Group” is displayed in the Command column of the Key menu next to the selected key or key combination.

In the Key menu, select the key or key combination that you want to use to connect a client to a parked call.

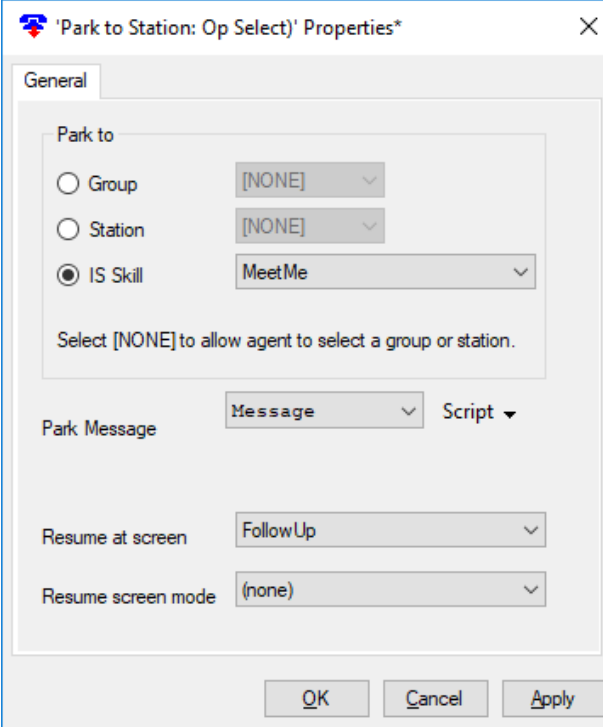
In the Command menu, select the Meet-Me Conferencing command.

Click the Assign icon  to make the assignment.

“Meet-Me Conferencing” is displayed in the Command column of the Key menu next to the selected key or key combination.

Configuring the Park Response Element

In addition to using a keyboard command to park calls, calls can be parked from a script using the Park response element. The Park response element is used to park a call to an Infinity Call Distribution Table, an agent station, or an IS ACD Skill.



'Park to Station: Op Select' Properties*

General

Park to

Group [NONE] ▼

Station [NONE] ▼

IS Skill MeetMe ▼

Select [NONE] to allow agent to select a group or station.

Park Message Message ▼ Script ▼

Resume at screen FollowUp ▼

Resume screen mode (none) ▼

OK Cancel Apply

Park To

The Park To property determines where the call will be parked.

Select the IS Skill option to park calls to an IS ACD Skill. Then click the menu and select a Skill Name configured for Manual Distribution.

Park Message

The Park Message field determines the Park Message that is assigned to the call. Agents can view the Park Message by pointing to a call in the Waits List. Clients can listen to the Park Message when calling into the client account if the account is configured for the Meet Me Park behavior.

Specify the information that clients and agents will use to match the client to the correct caller.

The Park Message property has a variable field type, which can be changed to use data obtained from other parts of the message script. By default, the field type is Text. To change the type of information that can be stored, click the field type, select “Change To” from the menu, and select a field type from the submenu.

More information about field types is provided in the “Response Element Library” section of the *Intelligent Series Supervisor Reference Guide*.

Resume at Screen

The Resume at Screen property determines the screen at which the message script will resume when an agent takes the parked call out of waits and answers it.

Click the menu and choose the appropriate screen name.

Resume Screen Mode

The Resume Screen Mode property assigns a screen mode to activate when an agent takes the parked call out of waits and answers it.

To set the script to resume using a screen mode other than the default screen mode, select the name of the desired screen mode from the Screen Mode menu.

More information about screen modes is provided in the “Easy Script Editor” section of the *Intelligent Series Supervisor Reference Guide*.

Parking a Call for Meet Me Park

Amtelco Soft Agent

F1 Mercy Medical Center Network **Talk** 0:10 **F2**
John Smith 7115551234

Activities - Ready
Info - General Info
New message

Mercy Medical Center, how may I help you?
Time to Answer 3.0 sec Called Number 7115552000 Client Number 7115552000 Call Status None

Back Info Sandbox Directory Navigate Browser Forward Take Message OnCall

New message X

Can I please have your name?
Caller Name **John Smith**

Who are you trying to reach?

First Name **Andrea** Last Name **Ward**

Search

Title

Department

Phone

Message **John Smith calling for .**

Change Account

At the tone say, "Phone call for Andrea Ward. Please dial extension 2891."

Overhead page

Park Call

Cancel Next

amy Stn: 13 Ready 01/24/2018 02:07 PM

To use the Meet Me Park feature to park a call, an agent performs the following steps:

1. After answering the call, change to a client account that is configured for a callback extension.

Amtelco Soft Agent

F1 Meet Me Pickup **Talk** 0:19 **F2**
John Smith 7115551234

Activities - Ready
Info - IS Intelligent Console
Meet Me Pickup

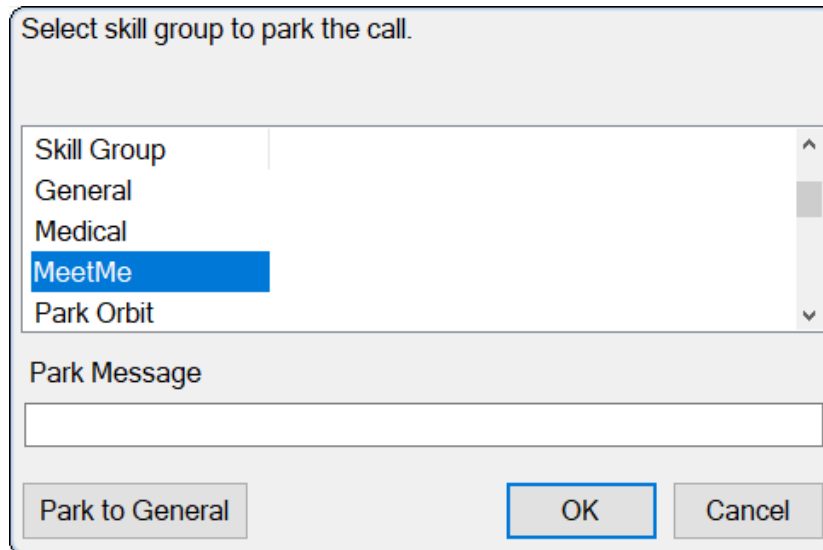
Please hold while I connect you to your party.

Time to Answer 4.2 sec Called Number 7115552000 Client Number 2575 Call Status None

amy Stn: 13 Ready 01/24/2018 02:07 PM

2. Put the caller on hold by selecting the call slot using the mouse or a keyboard command.
3. Page the requested client and provide the callback extension.
4. Take the caller off hold by selecting the call slot using the mouse or a keyboard command.
5. Perform the Park to Skill Group action using a script action or a keyboard command.

If keyboard command is used, the "Select skill group to park the call" dialog box is displayed. If a script action is used, omit steps 6 through 8 as the script completes the process.



Select skill group to park the call.

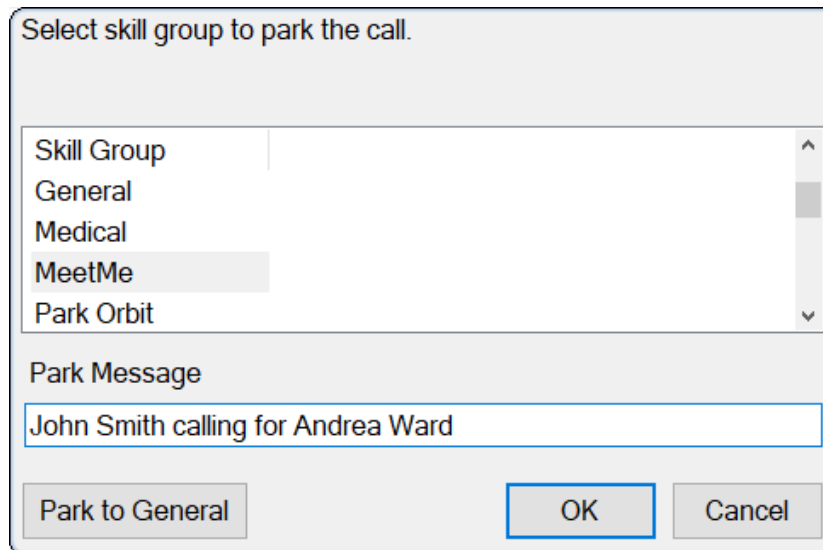
Skill Group

- General
- Medical
- MeetMe**
- Park Orbit

Park Message

Park to General OK Cancel

6. Select a Skill that is configured for Manual Distribution.
7. In the Park Message field, type the caller name and the name of the person the caller is trying to reach, or other information required to match the client to the caller.



Select skill group to park the call.

Skill Group

- General
- Medical
- MeetMe**
- Park Orbit


Park Message

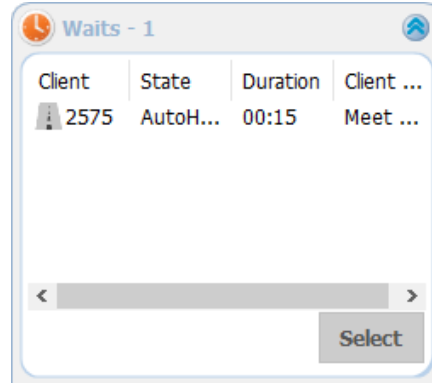
John Smith calling for Andrea Ward


Park to General OK Cancel

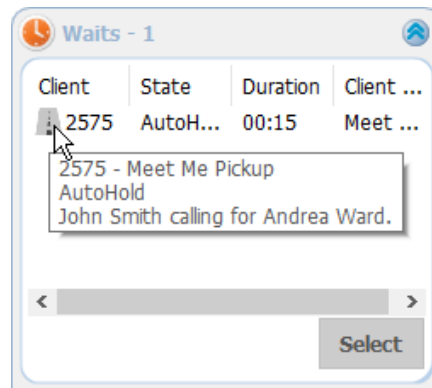
8. Click the OK button.

Viewing Parked Calls in Waits

Parked calls are displayed in the Waits window. Parked calls are indicated by a Park icon  displayed next to the Client Account Number in the Client column. The Client Account Number, call state, duration that the call has been in Waits, and the Client Name are displayed.



To view the Park Message, use the mouse to point to the Park icon  or the Client Account Number. The Client Account Number, Client Name, call state, and Park Message are displayed.



Automated Meet Me Conferencing

When the client calls the callback extension, the client's call is routed to the client account that has the callback extension programmed as a source.

If the client account is configured for the Meet Me Park behavior, IS Voice Services plays the optional greeting if one is configured.

- If there is only one parked call for the client account, the client is connected to the caller automatically.
- If there is more than one parked call for the client account, IS Voice Services announces a digit and the Park Message for each call that is parked for the client account. The client presses the digit associated with one of the calls to be connected to the caller.


Manual Meet Me Conferencing

The screenshot shows the Amtelco Soft Agent interface. At the top, there is a header for 'Meet Me Pickup' by Andrea Ward, with a 'Talk' button showing 0:11. Below this, a message says 'Please hold while I connect you to your party.' and call details: 'Time to Answer 8.9 sec', 'Called Number 2575', 'Client Number 2575', and 'Call Status None'. The main area displays the Amtelco logo. On the right, there is a sidebar with several panels: 'Activities - Ready' (with 'Meet Me Pickup' selected), 'Switch Data', 'Waits - 1' (containing a table of parked calls), 'Agent Settings', 'IS Messenger', 'Client List - 2901 Clients', and 'Dispatch List'. At the bottom, the agent's name 'amy', station 'Stn: 13', and status 'Ready' are shown, along with the date and time '01/24/2018 02:09 PM'.

Client	State	Duration	Client ...
2575	AutoH...	00:13	Meet ...

2575 - Meet Me Pickup
AutoHold
John Smith calling for Andrea Ward.

If the client account is not configured for the Meet Me Park behavior, the agent who answers the client call can conference the client with the parked call by performing the following steps:

1. After answering the client's call, compare the Client Account Number to the Client Account Number of the parked calls in the Waits window. Point to the Park icon  or the Client Account Number of a parked call to view the Park Message.
2. Select the appropriate parked call in the Waits window and then click the Select button.
The call is moved to one of the agent's call slots.

The screenshot shows the Amtelco Soft Agent interface with two call slots. The first slot, labeled 'F1', is for 'Meet Me Pickup' by Andrea Ward, with a 'Talk' button showing 0:20. The second slot, labeled 'F2', is for 'Meet Me Pickup' by John Smith, with a 'Hold' button showing 0:00. The client number 7115551234 is visible next to the second slot.

3. Perform the Meet-Me Conferencing action using the keyboard command.
The "Which appearance would you like to conference" dialog box is displayed.

Which appearance would you like to conference?

Appearance	Client
2	Meet Me Pickup

OK Cancel

- Select the call slot that contains the original call and then click the OK button. The two calls are joined in the conference state and the script of the original call is displayed.

If the Park response element was used to park the original call, the script resumes at the Resume At Screen and Screen Mode indicated in the Park response element properties. Otherwise, the script resumes at the same screen and Screen Mode that were active when the call was parked.

- You may use the Op Out keyboard command to leave the conferenced call on your screen or you may use the Disconnect keyboard command to remove the conference call from your screen.

The screenshot displays the Amtelco Soft Agent interface. At the top, the agent's name 'amy' and station 'Stn: 13' are visible. The main window shows a 'Resuming parked message' dialog box with a text input field for notes and a 'Cancel' button. The sidebar on the right contains several toolbars: 'Switch Data', 'Waits - 0', 'Agent Settings', 'IS Messenger', 'Client List - 2901 Clients', and 'Dispatch List'. The bottom status bar shows the date '01/24/2018' and time '02:10 PM'.

Requirements:

- IS Server 5.3 or later
- IS Supervisor 5.3 or later
- IS Messaging
- 64-bit Microsoft Windows Server 2008 R2 or later
- SQL Server 2008 R2 Standard Edition or later
- .NET Framework 4.5
- Crystal Reports 2008
- Genesis 4.6.11 or later
- 64-bit Ubuntu 16.04.2 or later Genesis Server
- Soft Agent 5.3.6774.01 or later

Recommended:

- 64-bit Microsoft Windows Server 2012 R2 or later
- SQL Server 2014 Standard Edition or later

Amtelco Part Number: 268MP000

