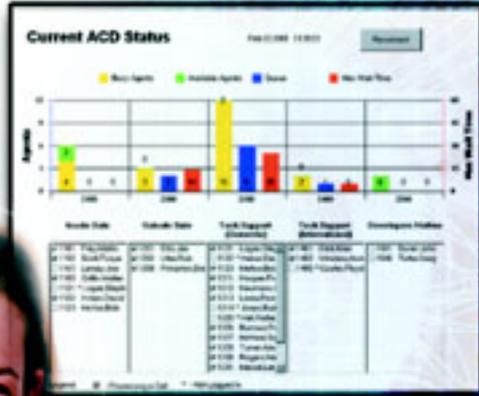


Enhanced Customer Service

Agent User's Guide



SALES Q=7 2:12
NEXT LOGIN CLEAR

ECS

Agent's User Guide

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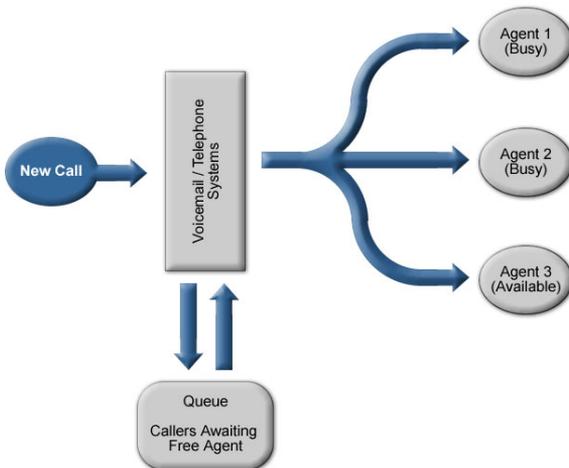
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1. WHAT IS ENHANCED CUSTOMER SERVICE?

Key Voice's Enhanced Customer Service (ECS) is a versatile tool that helps you answer calls more effectively and efficiently to improve overall customer satisfaction. ECS does this by ensuring that callers receive the fastest connection to the right person for their needs. And when there are more calls than people can answer, ECS automatically queues the incoming calls.

When a caller calls into the system, ECS routes calls to agents on the system. You, as an agent on the ECS system, answer these calls and provide the callers with the services they require. When all agents are busy handling calls, the ECS system places new callers into a queue where the callers can wait for the next available agent to take their call. As each agent ends a call, calls from the queue are automatically routed to the free agent's extension. This ensures that the calls are routed most effectively to the appropriate agents.



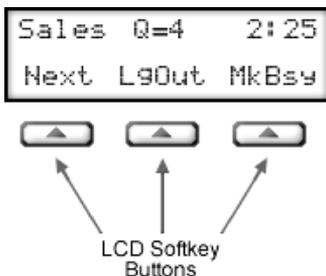
What is Enhanced Customer Service?

Depending on how the ECS system is set up, calls can be routed to the first agent in a group of agents, the next available agent in a group of agents, or the agent that has spent the longest amount of time without a call. These methods ensure that calls are distributed in the most appropriate way for a group of agents. Contact your system administrator for information on how your ECS system is set up to handle calls

Typically, when you log into the ECS system, you answer calls for a single customer service group. However, the ECS system lets you log in and answer calls for multiple groups at the same time. For example, if you answer both customer service and sales calls for your company, you could log into both the Customer Service group and the Sales group in ECS and answer calls for both groups. As calls come into the ECS system for either group, the calls are routed to your phone when you are not busy with another call.

There are two basic ways you can use Enhanced Customer Service. You can use the telephone LCD features to log into the ECS system and answer calls, or you can use the CS Desktop Agent on your computer in addition to your telephone to log into the ECS system and answer calls. Depending on how your ECS system is set up, you may use either method or even both methods. Contact your system administrator for information on the preferred way to use ECS..

Telephone LCD



CS Desktop Agent



Regardless of whether you use the telephone LCD or the CS Desktop Agent for ECS, you follow the same basic steps to use it. First, you log into the ECS system to notify it that you are ready to answer calls. Then, you answer calls that are automatically routed to your phone by the ECS system and provide the callers with the services they require. Finally, you log out of the ECS system when you finish answering calls.

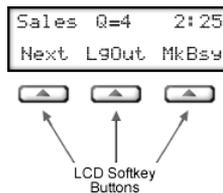
Another key feature of ECS is the ability to track information about each call that comes into the ECS system. The ECS system provides this information in a collection of reports that the system administrator and supervisors can use to track information about how calls are handled, such as how long calls waited in the queue and how many calls the ECS system receives. This information can help the system administrator and supervisors improve how calls are handled so that caller needs are met most efficiently and effectively.

For example, the system administrator may notice that the company usually receives a major increase in calls during lunch hours. Working with company supervisors, the system administrator could then ensure an appropriate number of agents are available during lunch hours to answer calls so that customers do not wait in the queue for an extended amount of time.

Important: To track ECS calls correctly, it is critical that you follow the instructions provided by your system administrator and supervisors when logging in and out of the system and making yourself available to answer calls.

2. USING THE TELEPHONE LCD FOR ECS

The LCD screen on your telephone is the easiest way to use the ECS system. When you use the LCD screen, you press the softkey buttons under the LCD screen to log into and out of the ECS system. Once you are logged into the ECS system, calls are automatically routed to your phone so you can handle calls most effectively.



Note: You must have a phone with an appropriate LCD screen to use it with the ECS system. If your phone does not have an appropriate LCD screen, you can use the CS Desktop Agent to use ECS. Contact your system administrator if you have a question about using your phone with ECS.

There are three basic steps you follow when you use the telephone LCD features for Enhanced Customer Service. First you log into the ECS system so you can begin using ECS. Next you answer calls that are automatically routed to your phone from the ECS system. Finally when you finish answering calls, you log out of ECS.

Important: *Before using ECS, you should check with your supervisor or system administrator for any special procedures or policies your company has implemented for the ECS system.*

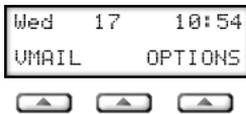
2.1 Logging Into ECS Using the Phone LCD Display

The first step in using ECS is to log into the ECS system to notify it that you are available to start answering calls. When you log into ECS, your telephone LCD display becomes dedicated to ECS functions. Because of this, you will notice the absence of certain information that is normally displayed on your telephone LCD, such as:

- Time and date no longer display.
- Caller identification information does not display when you receive a call.
- Digits you dial do not display when you place a call.

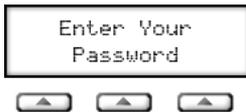
2.1.1 To log into ECS:

1. Call into your **Voice Mailbox**. You call into ECS the same way you would normally call in to check voice mailbox messages.

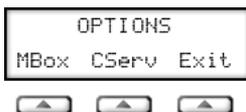


Note: You do not need to be at your normal telephone extension to log into ECS. You can use any phone on the system with an appropriate LCD display.

2. Enter your voice mailbox **Password**.

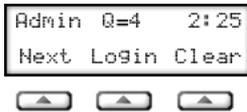


3. Follow prompts to start **Customer Service** or select the **CServ** softkey button, which is located under the LCD display of the phone.

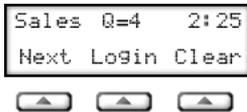


Using the Telephone LCD for ECS

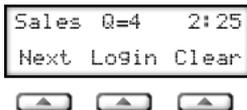
- Verify that the name of the customer service group you want to log into appears in the upper-left part of the LCD screen.



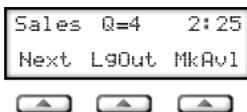
- If you need to log into a different customer service group, select the **Next** button until the correct group name appears.



- Select the **Login** button to log into the selected customer service group. You are now logged into the ECS system and the Login button changes to LgOut.



- Select the **MkAvl** button to inform the ECS system that you are ready to start taking calls. You will not start receiving calls until you select the MkAvl button. Note that some ECS systems may be set up to automatically make you available when you log into the system.



- If you need to answer calls for multiple groups at the same time, you can log into multiple groups by repeating steps 5-7 for each group you need to log into.

2.2 Answering Calls Using ECS

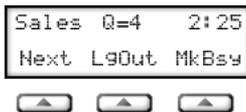
Once you log into the ECS system and make yourself available to receive calls, calls will be automatically routed to your phone. You answer these calls the same way you answer any normal calls.

Note that your system may be set up so that calls are immediately answered as soon as they are routed to your phone. When this feature is set up, you will hear a beep, and then a call is immediately answered by your phone, usually through a head set. This feature is commonly used by busy ECS groups so that you can save time by not having to press any buttons to answer the next call when you finish another call.

2.2.1 Understanding the LCD Display

The following example describes the ECS information that might display on a typical LCD screen:

- **Sales**—Displays the name of the group for which you are currently viewing information.
- **Q=4**—Displays the number of calls currently waiting to be answered in the group queue.
- **2:25**— Displays the length of time in minutes and seconds that the oldest call in the queue has been waiting.
- **Next** button—Changes groups so you can log into another group or simply view information on other groups of which you are a member.
- **Login/LgOut** button—Logs you in and out of the ECS system.
- **MkAvl/MkBsy** button—Makes your extension available to receive calls from the ECS system or makes your extension busy for a period of time so you can take a break or leave your phone for a moment.



2.2.2 Answering an ECS Call

When your phone rings, answer it the same way you answer a normal call remembering to include any appropriate greetings or questions to the caller. Contact your supervisor or system administrator for more information on the appropriate way to answer calls for the group.

When you finish the call, simply hang up the phone. This informs the ECS system that you are now available to answer the next call in the queue.

Note that if you are logged into multiple groups, you may receive calls from any of the groups you are logged into regardless of the group name that appears on the phone LCD screen.

2.2.3 Receiving Other Calls

If someone calls your phone outside of ECS, such as another employee calling your extension, it is treated as any other phone call. If you are not on the phone with a call, your phone will ring and you can answer the call. If you are on the phone with another call, the ECS system treats the call like any other call you receive when you are on the phone with another call, which may be to prompt the caller to leave a message in your voice mailbox.

When you are logged into ECS and your phone rings, you cannot tell whether the call is from the ECS system or from a call outside of ECS. Because of this, you should always answer the phone using the appropriate greeting for the ECS group you are logged into.

2.2.4 Transferring Calls

If you need to transfer a call you received through ECS to another extension, transfer the call the same way you transfer normal calls from your phone, then hang up the phone. Once you transfer a call and hang up, the ECS system is automatically notified that you are available to answer the next call in the queue.

2.2.5 Placing a Call on Hold

If you need to place a call on hold for a moment, use the same procedure you use to place any call on hold, then return to the call when you are ready. Once you finish the call and hang up, the ECS system is automatically notified that you are available to answer the next call in the queue.

2.2.6 Viewing ECS Call Status for a Group

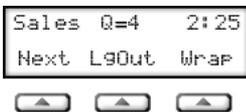
If you want to track the status of calls in a group or simply want to work as a backup agent in the ECS system, you can complete steps 1-5 in the *Logging Into ECS Using the Phone LCD Display* procedure. This shows you the call activity of the group without receiving any ECS calls.

Then, if there is an excess of calls waiting in the queue or a call has waited an extended amount of time for an agent, you can complete steps 6-8 to log into ECS and make yourself available to answer calls. Then, when call volume decreases, you can log out of the group and still remain connected to ECS.

2.2.7 Wrapping Up a Call

Some ECS systems may be set up to give you time after each call to complete administrative tasks, such as entering customer information in a database, before routing the next call to you.

If your ECS system is set up to use this feature, when you hang up at the end of a call, the MkBsy softkey button changes to the Wrap button and no new calls will be routed to your phone for a period of time. This gives you a chance to complete any additional work for the call before answering the next call in the queue.



When this wrap time is up, you are automatically made available again to answer calls. If you finish this work and want to resume answering calls before the wrap time is up, select the **Wrap** button. The Wrap button changes back to MkBsy.

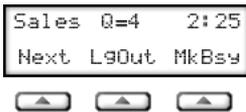
2.2.8 Taking a Break

If you need to take a break from answering calls or leave your desk for a moment, you can use the Make Busy (MkBsy) feature to make your extension busy so that no new calls are routed to your phone. This feature allows you leave your desk briefly without missing a call.

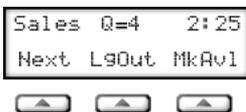
***Important:** If you are leaving for lunch or for an extended period of time, you should log out of the ECS system instead of using the MkBsy feature.*

2.2.9 To make your phone busy:

1. If you are currently on a call, finish the call and hang up.
2. Select the **MkBsy** button. The phone is made busy and the MkBsy button changes to MkAvl.



3. If you are logged into multiple ECS groups, you must make your phone busy for each group. Select the **Next** button and repeat the previous step for each group you are currently logged into.
4. To make yourself available to answer calls again, select the **MkAvl** button. The MkAvl button changes to MkBsy.



5. If you made your phone busy for multiple groups, you must make your phone available again for each group. Select the **Next** button and repeat the previous step for each group you are logged into.

2.2.10 Checking Voicemail

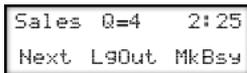
You cannot check your voicemail while you are logged into ECS. To check your voicemail, you must log out of each group you are currently logged into, check your voicemail the same way you normally check your voicemail, then log back into the ECS system. Because this process may take several minutes time, it is recommended that you check your voicemail only when it is appropriate to log out of ECS.

2.3 Logging Out of ECS

Once you have finished answering calls using the ECS system, you need to log out to ensure that calls are no longer routed to your phone.

2.3.1 To log out of ECS:

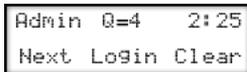
1. If you are currently on a call, finish the call and hang up.
2. Select the **LgOut** button. You are logged out of ECS.



Sales Q=4 2:25
Next LgOut MkbSw



3. If you are logged into more than one group, you must log out of each group separately to prevent calls from being routed to your phone. Select the **Next** button and repeat the previous step for each group you are currently logged into.
4. Select the **Clear** button to return the LCD screen on the phone back to its original settings.



Admin Q=4 2:25
Next Login Clear



3. USING THE CS DESKTOP AGENT FOR ECS

The CS Desktop Agent combines the features of the telephone with a computer to help you answer calls. The CS Desktop Agent runs on a computer and communicates with the telephone system to help you log into ECS and answer calls. Because you use the CS Desktop Agent to log into and out of ECS, you can use a telephone that does not have an LCD screen to answer calls.



Before you can use the CS Desktop Agent, it must be installed on the computer you want to use when answering calls. Contact your system administrator for information on installing and setting up the CS Desktop Agent on the computer. You must also have a telephone that is connected to the telephone system nearby so you can answer calls.

Because CS Desktop Agent is linked to your telephone set display, when you use CS Desktop Agent to log in, answer calls, or log out of ECS, your telephone set display will change to reflect what you are doing in ECS.

There are four basic steps you complete to use the CS Desktop Agent with ECS. First you start the CS Desktop Agent program and connect it to the phone you want to use to answer calls. Then, you log into the ECS group for which you answer calls. Next, you answer the calls that come into the ECS system. Finally, when you have finished answering calls, you log out of the ECS system.

Important: Before using ECS, you should check with your supervisor or system administrator for specific instructions on how to use the ECS system for your company.

3.1 Starting the CS Desktop Agent

The first step in using the CS Desktop Agent is to start the CS Desktop Agent program and connect it to the phone you want to use to answer calls.

To start the CS Desktop Agent:

1. Turn the computer on and start Windows, if it is not already started.
2. Click the **Start** button in the lower-left corner of the Windows desktop, select **Programs, Voice Messaging, Reports**, then **CS Desktop Agent**. The CS Desktop Agent program starts and the Login as CS Agent screen appears.



3. Enter your voice mailbox password in the **Enter your password** field.



Note that your password appears as asterisks (*) when you enter it to prevent others from seeing your password as you enter it.

Note: *If you are a system administrator logging into the ECS system, you can select the Login as Administrator checkbox and enter the administrator password to log in as an administrator. When you log in as an administrator you can perform many different administrative tasks, such as viewing information about agents that are currently logged into ECS. Note that you enter the voicemail system administrator password when you log in as an administrator, not your voice mailbox password.*

4. Click the **OK** button. The CS Agent screen appears.



5. If your name is not the selected name in the Agent drop-down list or you received an error after clicking **OK**, select your name from the list of agents, then when prompted, enter your password again and select the **OK** button. You are now entered correctly in the ECS system. If your name does not appear in the agent list, contact your system administrator.

6. In the **Extension** field, enter the extension of the phone you use to answer calls. This phone should be next to the computer you are using. Note that the extension number may already be entered for you.
7. Click the **To ECS** button to connect the CS Desktop Agent to the telephone system. In a moment, the telephone system will call the extension you entered in the Extension field to ensure that the correct phone is available to you to answer calls.
8. Answer the phone when it rings. The voicemail system informs you that you are now connected to the customer service system and prompts you to enter your password.
9. Enter your voice mailbox password using the telephone keypad. The CS Desktop Agent is started and the phone is now connected to the ECS system. You can now log into ECS to begin answering calls.



3.2 Logging Into ECS Using the CS Desktop Agent

Once you have started the CS Desktop Agent program and connected your phone to ECS, you need to log into the ECS system to notify it that you are available to start answering calls.

3.2.1 To log into the ECS system:

1. Start the CS Desktop Agent and connect your phone to the ECS system, if it is not already connected.
2. From the **Group** drop-down list on the CS Desktop Agent screen, select the group you want to log into. Note that you can log into additional groups at the end of this procedure.



3. Click the **Login** button. The MkAvail button becomes active.



4. Click the **MkAvail** button to notify the ECS system that you are available to start answering calls. You will not start receiving calls until you select the MkAvail button. Note that some ECS systems may be set up to automatically make you available when you log into the system.



5. If you need to log into additional groups, repeat steps 2-4.

3.3 Answering Calls Using CS Desktop Agent

Once you log into the ECS system using the CS Desktop Agent and make yourself available to receive calls, calls will be routed to your phone. You answer these calls the same way you answer any normal calls.

3.3.1 Understanding the CS Desktop Agent Screen

The CS Desktop Agent screen displays the following information when you use ECS:

- **Agent**—Displays the name of the agent that is using the CS Desktop Agent. If your name is not the selected agent name, you can select your name from the Agent drop-down list.
- **Group**—Displays the name of the group for which you are currently viewing information and allows you to switch between groups so you can view group information or log in/out of a group.
- **Queue**—Displays the number of calls holding in the queue for an available agent in the currently selected group.

- **Max Wait**—Displays the length of time in minutes and seconds that the oldest call in the group queue has waited for an available agent.
- **Time on Call**—Displays the length of time that you have spent on the current call.
- **Extension**—Displays the extension of the phone you are using to answer calls. Note that this number may be different than your mailbox number.
- **To ECS/Clear ECS**—Connects and disconnects your phone from the ECS system. Note that you should not click the Clear ECS button until you have logged out of the ECS system.
- **Login/Logout**—Logs you in and out of the ECS system.
- **MkAvail/MkBusy**—Makes your extension available to receive calls from the ECS system or makes your extension busy for a period of time so you can take a break or leave your phone for a moment.
- **End wrap up**—Ends the wrap up time after a call if you want to resume answering calls before the wrap up time expires.
- —Sets whether the CS Desktop Agent floats on top of other programs you work with in Windows. The  means that the CS Desktop Agent works like normal Windows programs and can be a program running in the background. The  means that the CS Desktop Agent will always be visible on screen and float on top of other programs you work with. Click the pushpin button to switch between the two options.
- —Notifies you that the CS Desktop Agent is connected to the ECS Reports server. This simply lets you know that you are properly connected to the ECS Reports Server so that the calls you answer are tracked correctly in the reports.
- If the  appears, the CS Desktop Agent is not connected to the ECS Reports server and you should contact your system administrator.

- —Displays the current status of the CS Desktop Agent. The statuses that can display are:
 - ECS mode OFF
 - Logged in, not available
 - Waiting for a call
 - Processing a call
 - Wrapping Up
 - Logged Out
- The  means that the CS Desktop Agent is connected to the ECS system, but the phone has not yet been connected to the ECS system. To connect the phone to the ECS system, enter the extension of the phone in the Extension field, then click the To ECS button.
- —Notifies you that the CS Desktop Agent and your phone are connected to the ECS system. The  means that the CS Desktop Agent and phone are connected to the ECS system and you can log in and begin answering calls.
- The  means that the CS Desktop Agent is not connected to the ECS system and you should contact your system administrator.

3.3.2 Answering an ECS Call

When your phone rings, answer it the same way you answer a normal call remembering to include any appropriate greetings or questions to the caller. Contact your supervisor or system administrator for more information on the appropriate way to answer calls for the group.

Note that you do not use the features of the CS Desktop Agent to answer calls. The CS Desktop Agent simply helps you log into and out of the ECS system. It also provides you with information about the calls you answer and the calls that are currently waiting in the queue.

When you finish a call, simply hang up the phone. This informs the ECS system that you are now available to answer the next call in the queue.

Note that if you are logged into multiple groups, you may receive calls from any of the groups you are logged into regardless of the group name that appears on the CS Desktop Agent screen.

3.3.3 Receiving Other Calls

If someone calls your phone outside of ECS, such as another employee calling your extension, it is treated as any other phone call. If you are not on the phone with a call, your phone will ring and you can answer the call. If you are on the phone with another call, the ECS system treats the call like any other call you receive when you are on the phone with another call, which may be to prompt the caller to leave a message in your voice mailbox.

When you are logged into ECS and your phone rings, you cannot tell whether the call is from the ECS system or from a call outside of ECS. Because of this, you should always answer the phone using the appropriate greeting for the ECS group you are logged into.

3.3.4 Transferring Calls

If you need to transfer a call you received through ECS to another extension, transfer the call the same way you transfer normal calls from your phone, then hang up the phone. Once you transfer a call and hang up, the ECS system is automatically notified that you are available to answer the next call in the queue.

3.3.5 Placing a Call on Hold

If you need to place a call on hold for a moment, use the same procedure you use to place any call on hold, then return to the call when you are ready. Once you finish the call and hang up, the ECS system is automatically notified that you are available to answer the next call in the queue.

3.3.6 Viewing ECS Call Status for a Group

If you want to track the status of calls in a group or simply want to work as a backup agent in the ECS system, you can complete the *Starting the CS Desktop Agent* procedure and steps 1-2 of the *Logging Into ECS Using the CS Desktop Agent* procedure. This shows you the call activity of the group without receiving any ECS calls.

Then, if there is an excess of calls waiting in the queue or a call has waited an extended amount of time for an agent, you can complete steps 3-5 of the *Logging Into ECS Using the CS Desktop Agent* procedure to log into ECS and make yourself available to answer calls. Then, when call volume decreases, you can log out of the group and still remain connected to ECS.

3.3.7 Wrapping Up a Call

Some ECS systems may be set up to give you time after each call to complete administrative tasks, such as entering customer information in a database, before routing the next call to you.

If your ECS system is set up to use this feature, when you hang up at the end of a call, the **End wrapup** button becomes an active button and no new calls will be routed to your phone for a period of time. This gives you a chance to complete any additional work for the call before answering the next call in the queue.



When this wrap time is up, you are automatically made available again to answer calls. If you finish this work and want to resume answering calls before the wrap time is up, click the **End wrapup** button. The End Wrapup button is grayed out and you are made available to answer calls again.

3.3.8 Taking a Break

If you need to take a break from answering calls or leave your desk for a moment, you can use the Make Busy (MkBusy) feature to make your extension busy so that no new calls are routed to your phone. This feature allows you leave your desk briefly without missing a call.

Important: If you are leaving for lunch or for an extended period of time, you should log out of the ECS system instead of using the MkBusy feature.

3.3.9 To make your phone busy:

1. If you are currently on a call, finish the call and hang up.
2. Click the **MkBusy** button. The phone is made busy and the MkBusy button changes to MkAvail.



3. If you are logged into multiple ECS groups, you must make your phone busy for each group. Complete the following steps for each group you are currently logged into:
 - a.) From the **Group** drop-down list, select the next group you are logged into.
 - b.) Click the **MkBusy** button on the CS Desktop Agent screen. The MkBusy button changes to MkAvail.
 - c.) Repeat steps a-b for each group you need to make busy.
 - d.) To make yourself available to answer calls again, click the **MkAvail** button. The MkAvail button changes to MkBusy.



5. If you made your phone busy for multiple groups, you must make your phone available again for each group. Complete the following steps for each group you are logged into:
 - a.) From the **Group** drop-down list, select the next group you are logged into.

- b.) b. Click the **MkAvail** button on the CS Desktop Agent screen. The MkAvail button changes to MkBusy.
- c.) c. Repeat steps a-b for each group you need to make available.

3.3.10 Checking Voicemail

You cannot check your voicemail while you are logged into ECS. To check your voicemail, you must log out of each group you are currently logged into, check your voicemail the same way you normally check your voicemail, then log back into the ECS system. Because this process may take several minutes time, it is recommended that you check your voicemail only when it is appropriate to log out of ECS.

3.4 Logging Out of ECS Using the CS Desktop Agent

Once you have finished answering calls using ECS, you need to log out to ensure that calls are no longer routed to your phone.

To log out of ECS using the CS Desktop Agent:

1. If you are currently on a call, finish the call and hang up.
2. Click the **Logout** button. You are logged out of ECS.



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3. If you are logged into more than one group, you must log out of each group separately to prevent calls from being routed to your phone. Complete the following steps for each group you are logged into.
 - a.) From the **Group** drop-down list, select the next group you are logged into.
 - b.) Click the **Logout** button on the CS Desktop Agent screen. The Logout button changes to **Login**.
 - c.) Repeat steps a-b for each group you need to log out of.
4. Click the **Clear ECS** button to disconnect the phone from the ECS system. The Clear ECS button changes to To ECS.



5. Click the **Close** button in the upper-right corner of the screen to close the CS Desktop Agent.

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