



DESKTOP CLIENT APPLICATION USER GUIDE

VERSION 6

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OVERVIEW

The OAISYS Desktop Client is a powerful desktop application that dramatically enhances your experience with the OAISYS solution. This guide provides installation procedures, and walks you through the available features.

INSTALLATION

Browse to your Tracer server. Secondary DNS are supported within the Desktop client – this configuration requires the primary extension be configured as the extension for the client.

The URL may be similar to this: http://your_server_name.oaisys.com

The following page will display in your browser.

Click on the OAISYS Desktop Client button to install the application.



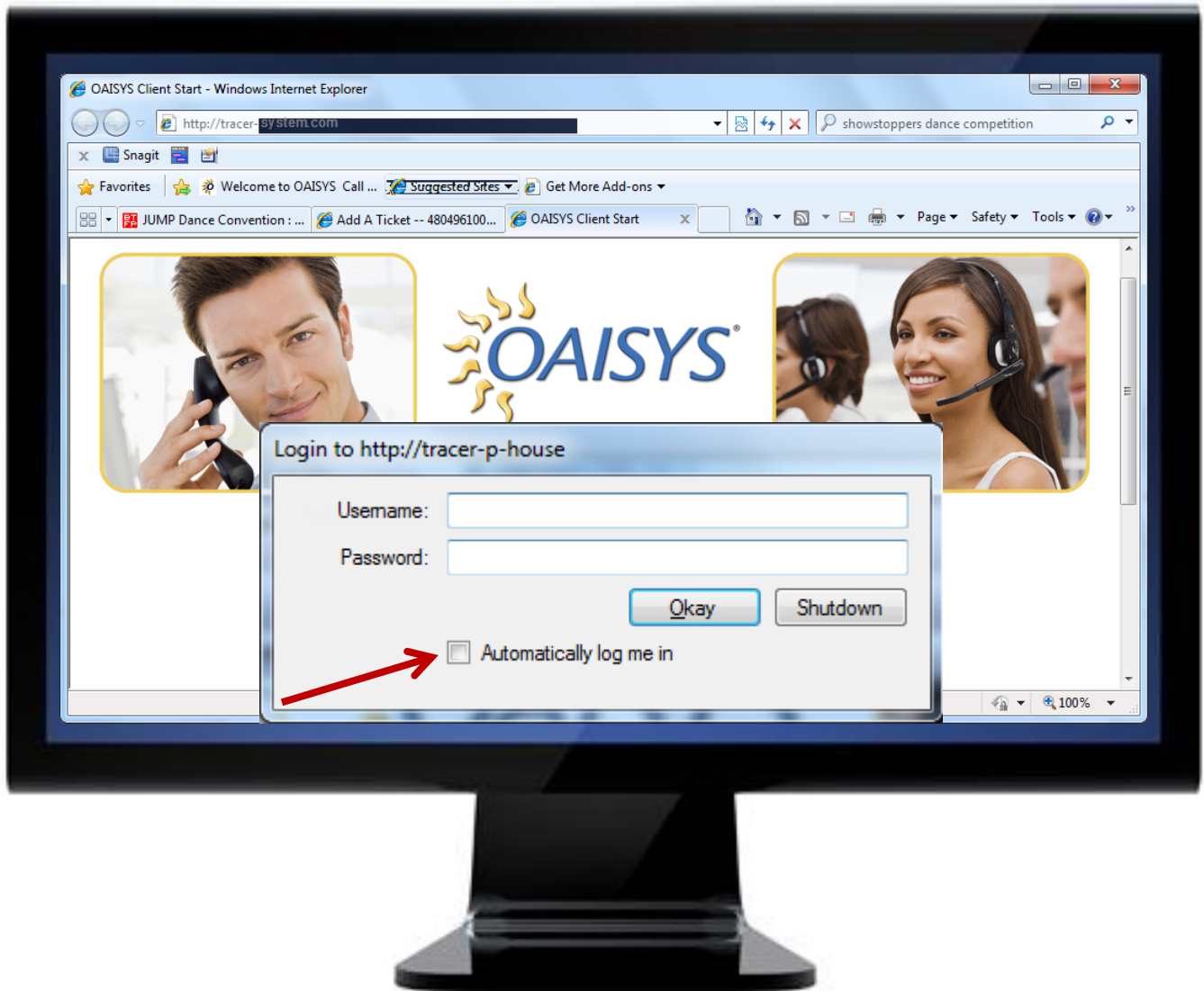
You'll be prompted to log in.



Enter your user name and password. Enter a check mark in the box to indicate you'd like the system to log you in automatically next time.

NOTE: You may be required to change your password after your first successful log in.

If your user account is configured to use Windows Authentication you will not be required to login.



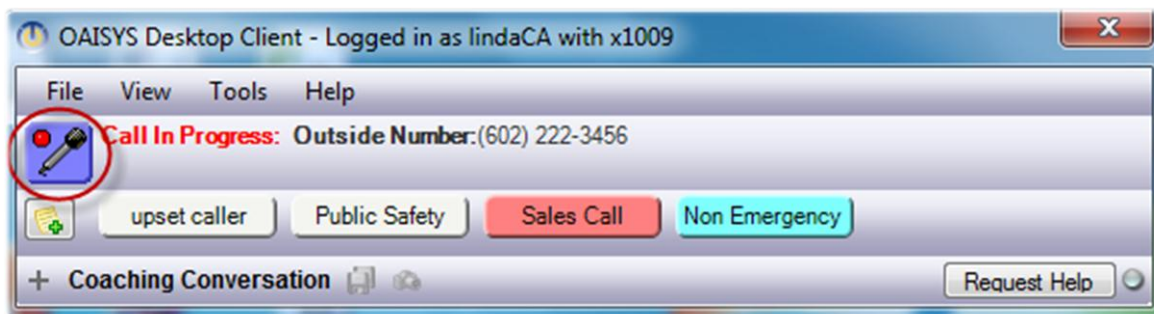
USING THE DESKTOP CLIENT

The OAISYS Desktop client can be used to:

- Stop or Start a recording (permission based)
- View information about a call in progress
- Add information to a live call
- Request help from a manager or participate in a coaching session

RECORDING CONTROL

The user must have permission enabled to start or stop a recording in progress. To start or stop a recording, click once on the Stop/Start button (circled below).



VIEW CALL INFO

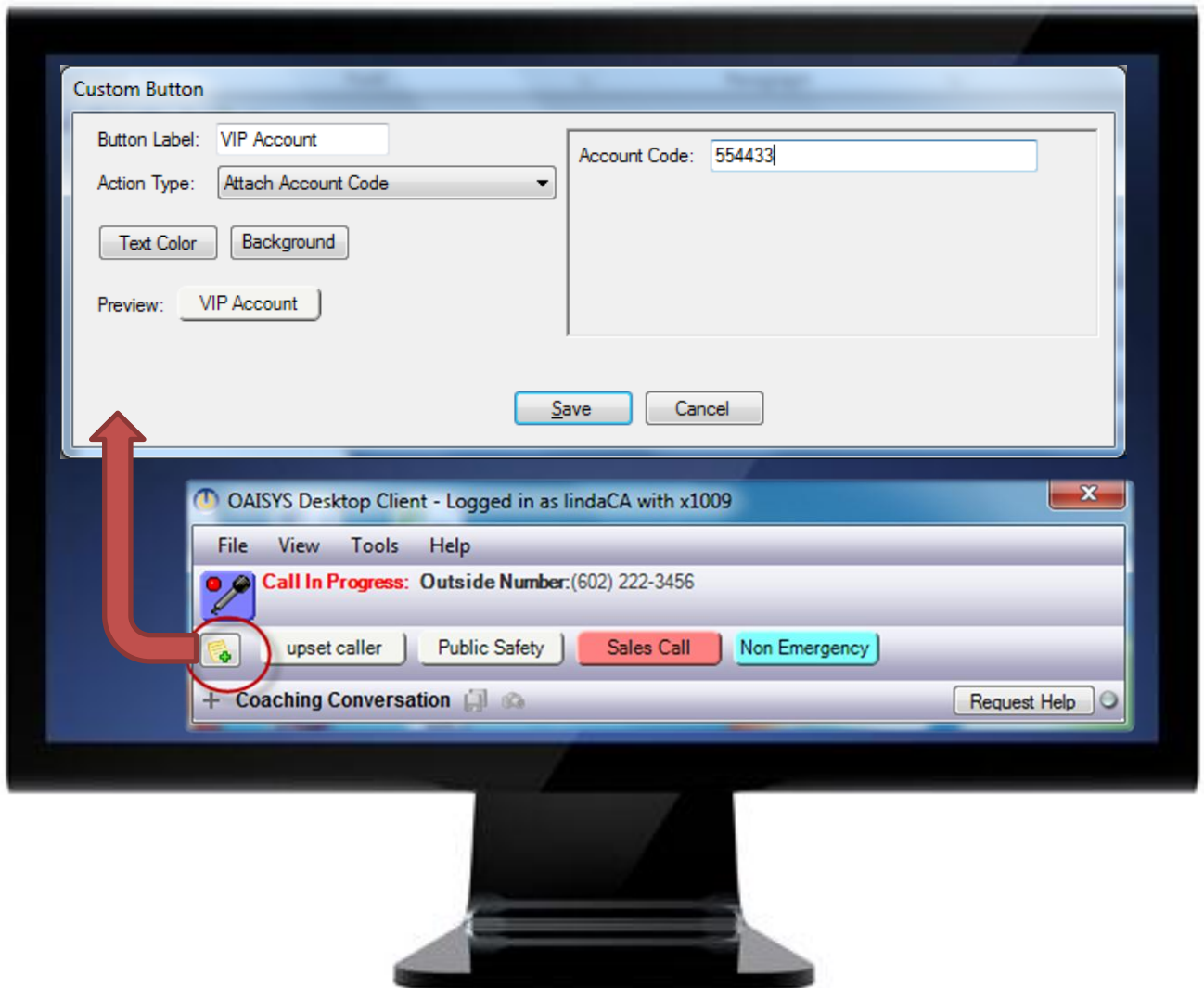
The call information displayed on inbound and outbound calls includes the extension, outside number, and call duration. Intercom call information is not displayed in the OAISYS Desktop Client for trunk side recording.

ADD INFORMATION TO A CALL – “CALL TAGGING”

Six Programmable Buttons are available for customization by users with permissions enabled, or a Call Manager can publish buttons per user/user group.

ADD A CUSTOM BUTTON

Click on the Add Button icon circled below to launch the Custom Button pop-up.



NOTE: If the icon appears grayed out that indicates the user does not have permission to add buttons or the maximum number of buttons (six) have already been programmed.

Button Label: Enter a name for the button.

Action Type: Select an option from the drop down list. (Each type will be

discussed in greater detail below.)

Text Color: Select the text color for the button.

Background: Select the background color of the button (not including the text).

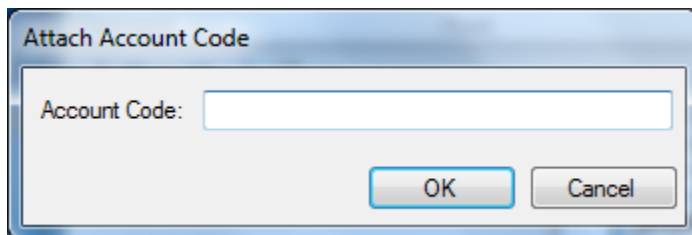
Preview: Click to see what your programmed button will look like.

Save: Save the button you've configured or save the changes you've made to an existing button.

Cancel: Do NOT save changes.

ACTION TYPES

Account Code: Enter the account code. When the user clicks the corresponding button, the hard coded account code will be added to the call. However, if this field is left blank, the user will be prompted to enter an account code as shown below.

A screenshot of a dialog box titled "Attach Account Code". The dialog box has a light blue header and a white body. Inside the body, there is a label "Account Code:" followed by a text input field. At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

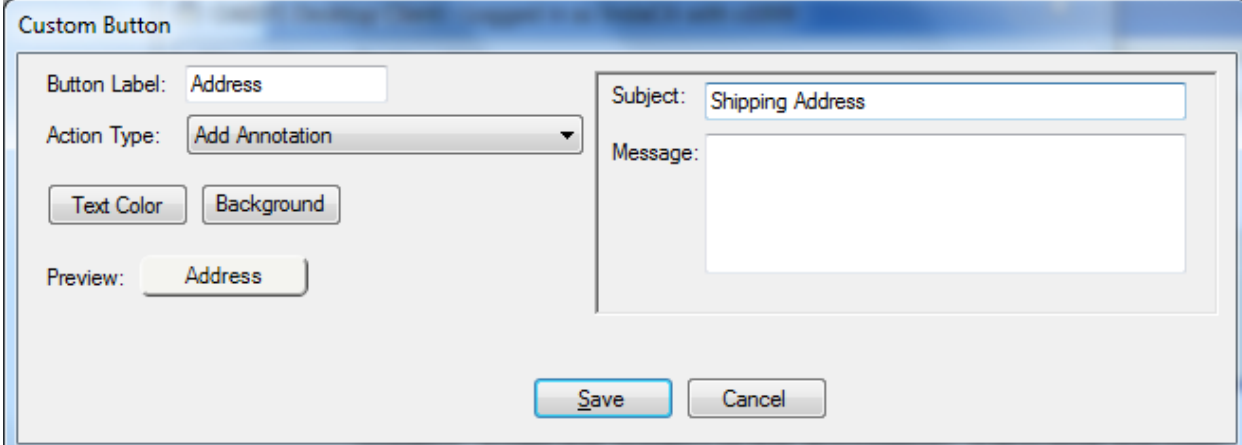
Add Annotation: When the user clicks the custom button, they are prompted to attach an annotation to the call.

- **Subject:** Enter the subject of the annotation. Each time the user clicks this button this subject will appear as the subject of the annotation.

If left blank, the user will be able to enter any subject.

- **Message:** Enter a message that will appear each time the user clicks the annotation button.

If left blank, the user will be prompted to enter the message or body of the annotation.



Custom Button

Button Label: Address

Action Type: Add Annotation

Text Color Background

Preview: Address

Subject: Shipping Address

Message:

Save Cancel

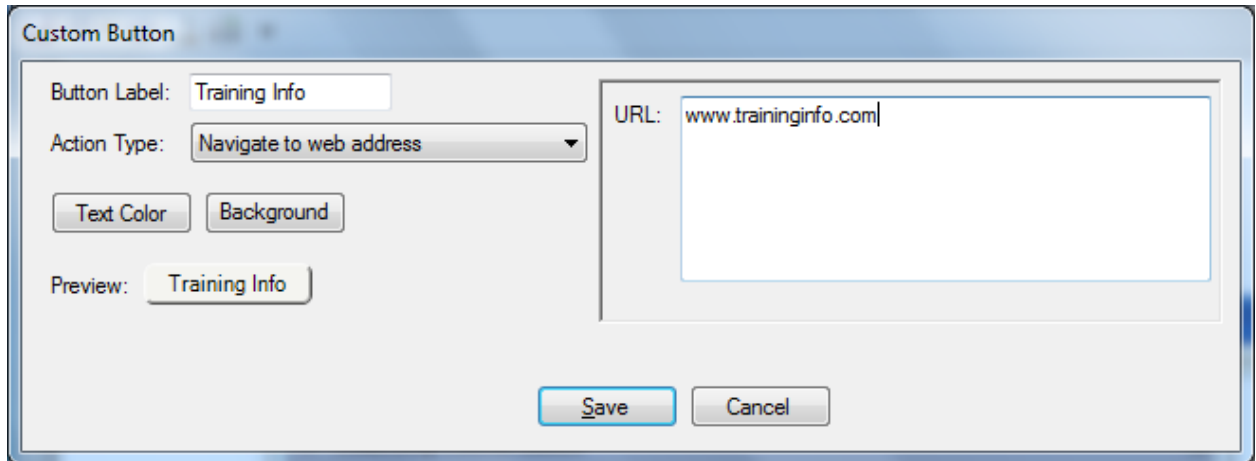


For example: Set up a button called **Shipping Address** with the subject programmed to Shipping Address. While on a phone call, the user clicks the button to enter the caller's shipping address, and receives the following pop-up.

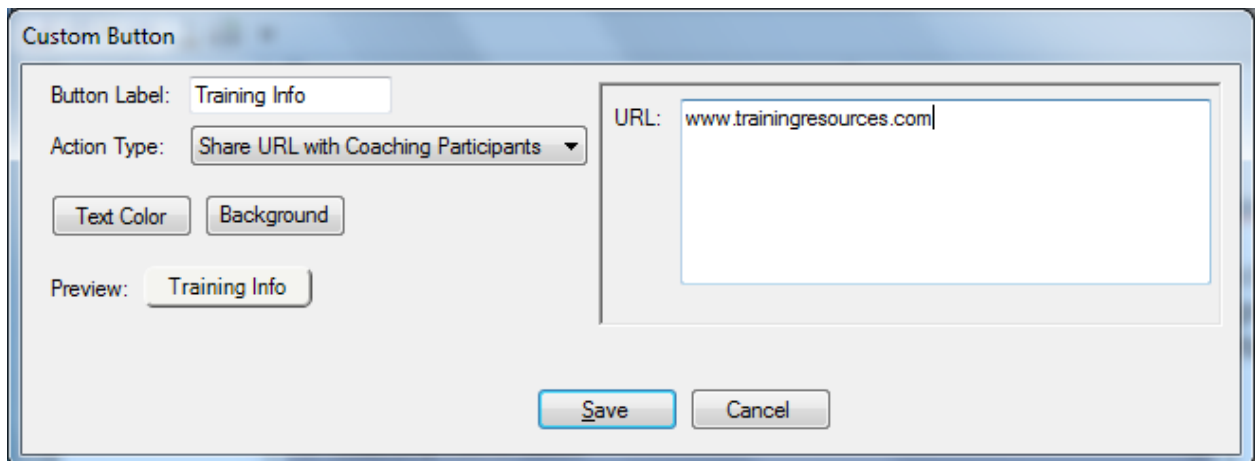
A screenshot of a software dialog box titled "Add Annotation". The dialog has a light blue header bar. Below the header, there is a "Subject:" label followed by a text input field containing the text "Shipping Address". Below that is a "Message:" label followed by a larger, empty text area. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

The subject would be hard coded, and the user would enter the address provided by the caller. This information becomes part of the call information, and is searchable from the OAISYS Management Studio.

Navigate to Web Address: Enter the URL so when a user clicks this button their browser will launch and they will be taken to the preprogrammed URL. This can also be programmed for a path to an important file on the PC, or a document, etc.

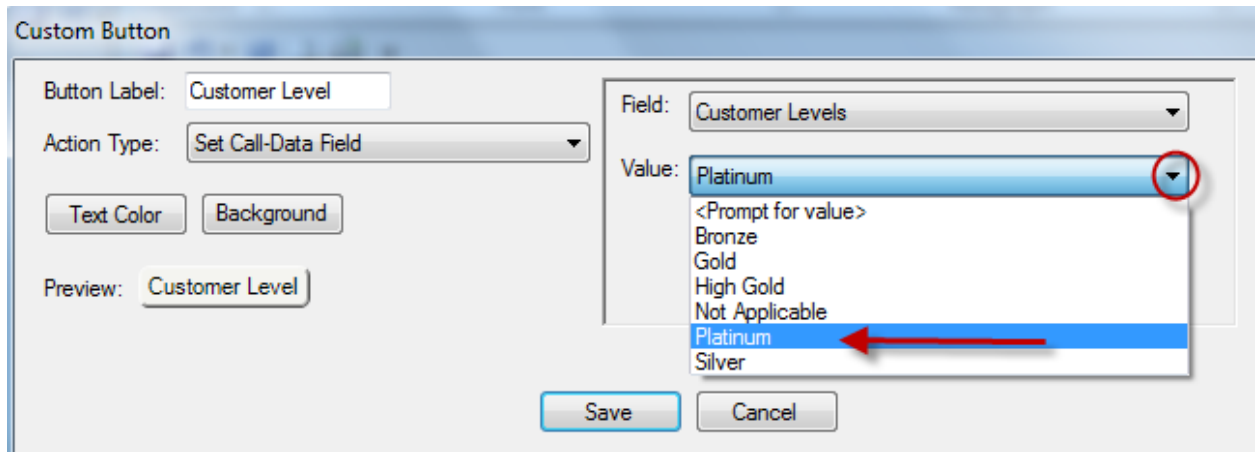
A screenshot of a software dialog box titled "Custom Button". The dialog has a light blue header and a white body. On the left side, there are several controls: a text input field for "Button Label" containing "Training Info"; a dropdown menu for "Action Type" set to "Navigate to web address"; two buttons labeled "Text Color" and "Background"; and a "Preview" section showing a button with the text "Training Info". On the right side, there is a large text area for "URL:" containing the text "www.traininginfo.com". At the bottom of the dialog are two buttons: "Save" and "Cancel".

Share URL with Coaching Participants: Enter the URL so when a user clicks this button during a coaching session the coaching recipient's browser will launch and they will be taken to the URL programmed here. This can also be programmed for a path to an important file on the PC, or a document, etc.

A screenshot of a software dialog box titled "Custom Button". The dialog has a light blue header and a white body. On the left side, there are several controls: a text input field for "Button Label" containing "Training Info"; a dropdown menu for "Action Type" set to "Share URL with Coaching Participants"; two buttons labeled "Text Color" and "Background"; and a "Preview" section showing a button with the text "Training Info". On the right side, there is a large text area for "URL:" containing the text "www.trainingresources.com". At the bottom of the dialog are two buttons: "Save" and "Cancel".

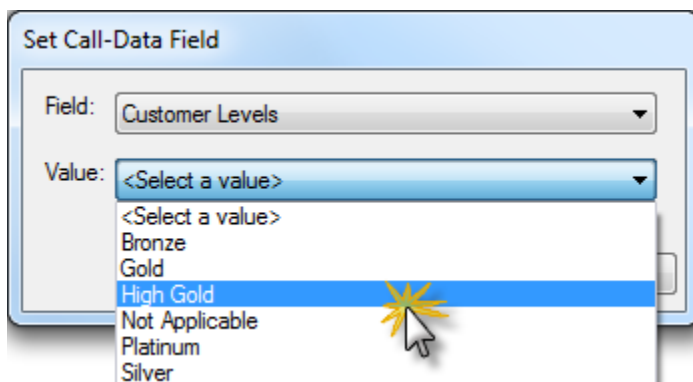
Set Call Data Field: Select a field from the drop down list.

You can set this to “Prompt for Field” which will allow the user to select from the drop down list while on a call.



NOTE: This drop down list will be populated with all fields that have been set up in the administrator. Please refer to the [OAISYS Administrator Guide](#) for more information.

For example: Callers are identified according to customer level; the agent takes a call and clicks their Customer Level button to select the level and continue the call. The Call Manager can later run a report to see how many times their Platinum Level customers called over the past month.



COACHING

An agent or employee can request help from Call Managers while on an inbound or outbound call. The user will click once on the Request Help button.

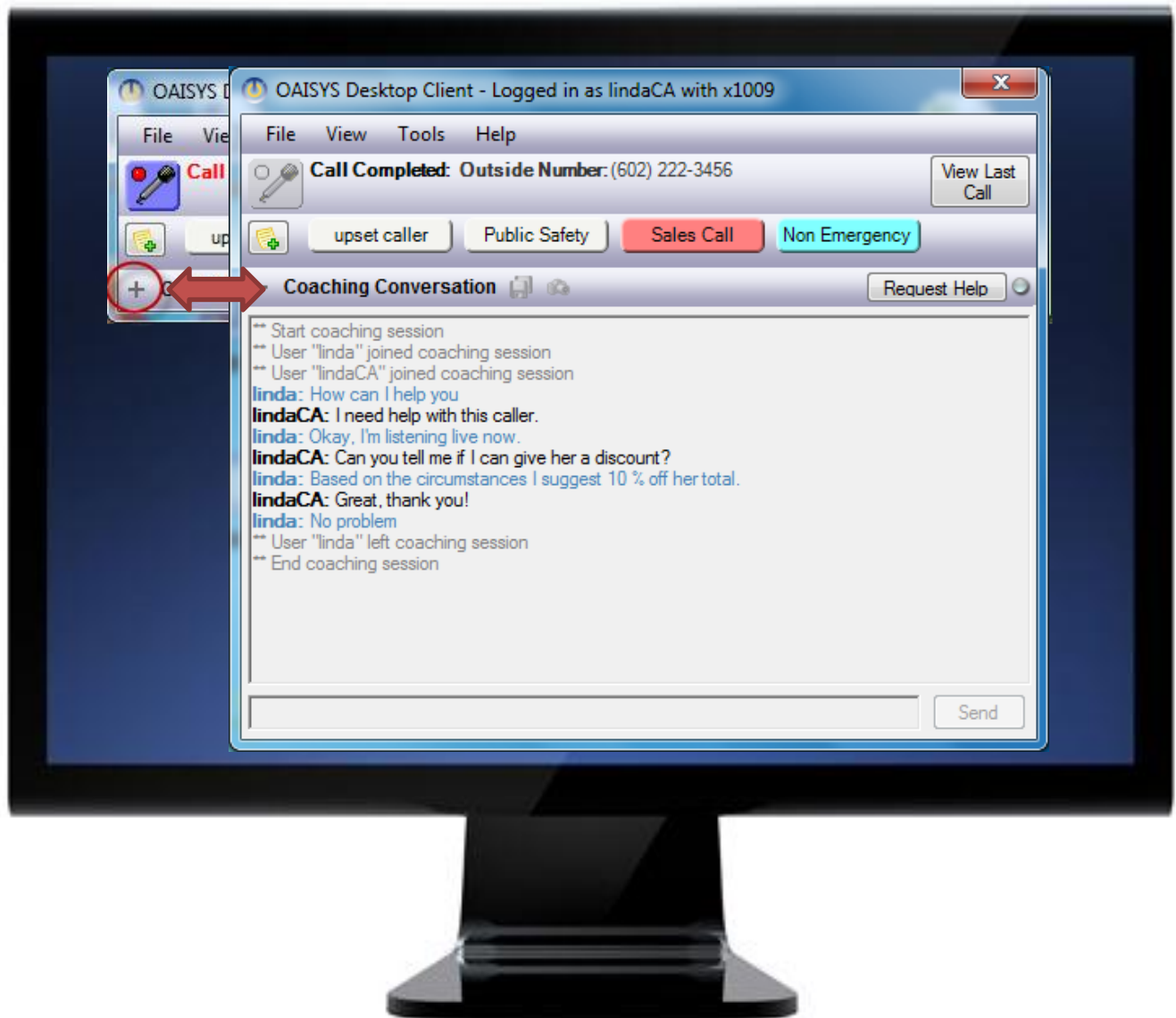


A message will go out to all Call Managers who are logged into the system. The Call Managers can respond:

- Ignore the Request
- Accept the Request
- Deny the Request
- If the request is denied, a reason can be entered for the file.

More than one manager may accept the request from the agent. The agent can cancel their request at any time by clicking on the Cancel Request button.

Click on the + sign to expand the coaching conversation as shown below.



Once a Call Manager or supervisor accepts the agent's request their name will appear in the Coaching Conversation. The agent and supervisor can send text messages, URLs, screen captures, and files or shortcuts to one another. The agent can end the coaching session at any time.

- The coaching session can continue even after the call is complete, until one of the participants ends the session.

VIEW LAST CALL

The Desktop Client User can click once on the View Last Call button to bring up the last call they were on in Historical Calls. This requires the user have permissions enabled to access the call, and permissions enabled to use the OAISYS Management Studio.

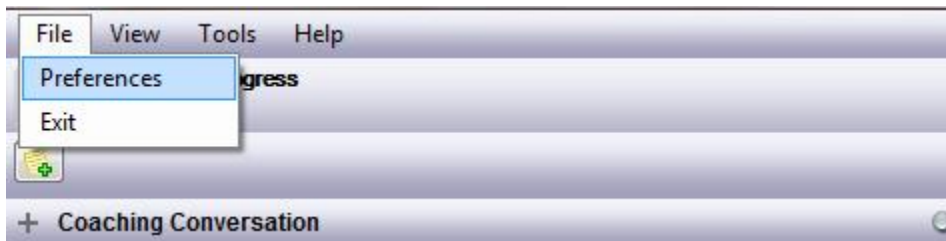


OAISYS DESKTOP CLIENT MENU

This screen provides customization of the OAISYS Desktop Client Menu preferences; each option is discussed in further detail below.

To view or edit your preferences

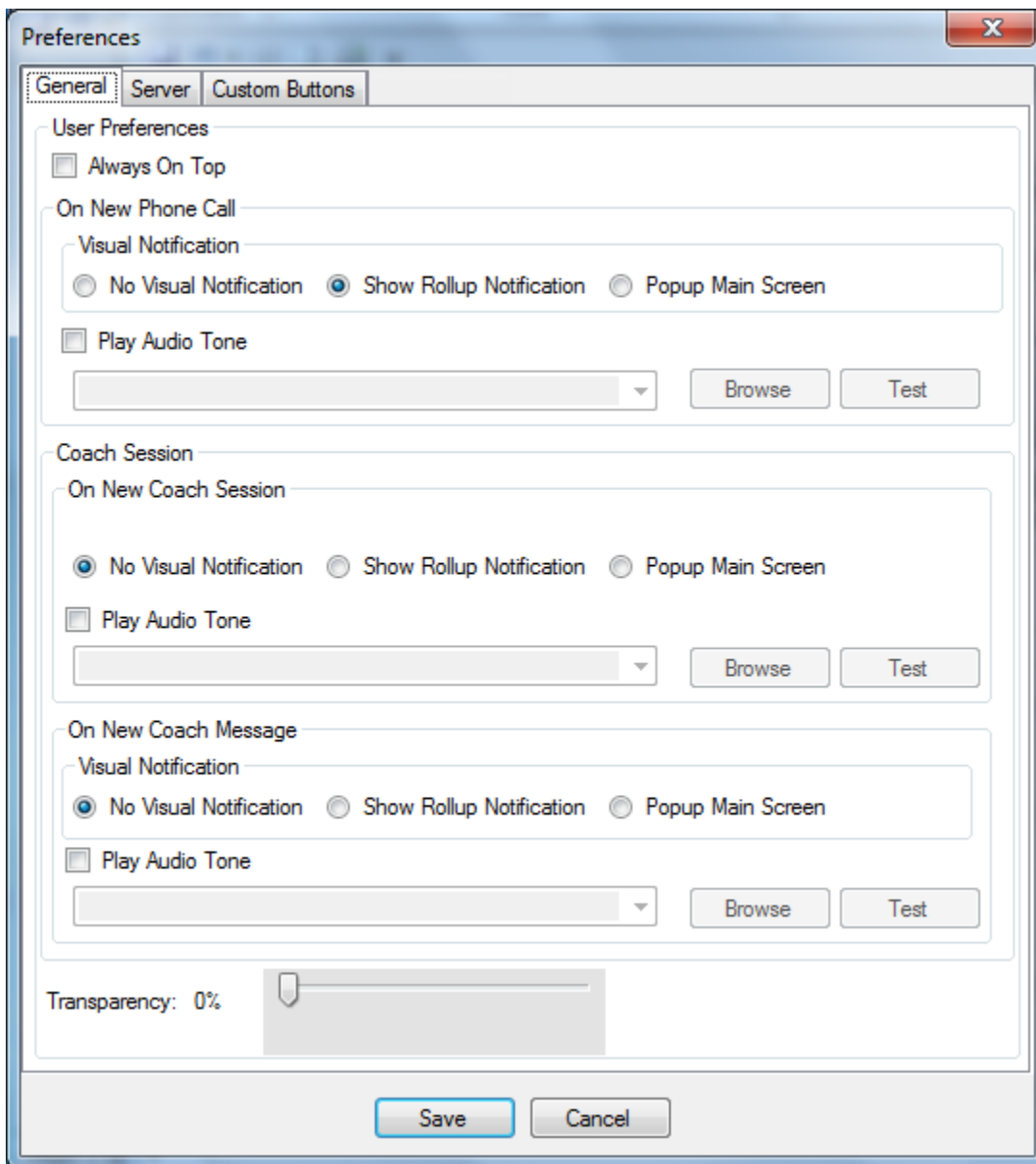
Select File → Preferences



PREFERENCES

GENERAL TAB

Each section of this screen is discussed in further detail below.



The screenshot shows the 'Preferences' dialog box with the 'General' tab selected. The dialog has three tabs: 'General', 'Server', and 'Custom Buttons'. The 'General' tab is active and contains the following sections:

- User Preferences**
 - Always On Top
- On New Phone Call**
 - Visual Notification**
 - No Visual Notification
 - Show Rollup Notification
 - Popup Main Screen
 - Play Audio Tone
 - A file selection dropdown menu with 'Browse' and 'Test' buttons.

- Coach Session**
- On New Coach Session**
 - No Visual Notification
 - Show Rollup Notification
 - Popup Main Screen
 - Play Audio Tone
 - A file selection dropdown menu with 'Browse' and 'Test' buttons.
- On New Coach Message**
 - Visual Notification**
 - No Visual Notification
 - Show Rollup Notification
 - Popup Main Screen
 - Play Audio Tone
 - A file selection dropdown menu with 'Browse' and 'Test' buttons.
- Transparency: 0%** with a slider control.

At the bottom of the dialog are 'Save' and 'Cancel' buttons.



Always on Top: Check this box to keep the OAISYS Desktop Client application on top of all other applications on the desktop.

On New Phone Call: Check the radio button to indicate the desired behavior when you are active on a new phone call.

- *No Visual Notification:* Your application will remain displayed or in the tray. Nothing will change when you begin a new phone call.
- *Show Roll up Notification:* When you begin a new phone call, the application will roll up briefly to indicate you are on a phone call. It will roll back down automatically.
- *Popup Main Screen:* When you begin a new call, the application will popup on your screen. It will not roll down automatically.
- *Play Audio Tone:* Play the selected tone when a new call arrives.

On New Coach Session: Check the radio button to indicate the desired behavior when you are active on a new coaching session.

- *No Visual Notification:* Your application will remain displayed or in the tray. Nothing will change when you begin a new coaching session.
- *Show Roll up Notification:* When you begin a new coaching session the application will roll up briefly to indicate you are on a coaching session. It will roll back down automatically.
- *Popup Main Screen:* When you begin a new coaching session the application will popup on your screen. It will not roll down automatically.
- *Play Audio Tone:* Play the selected tone when a coaching session begins.

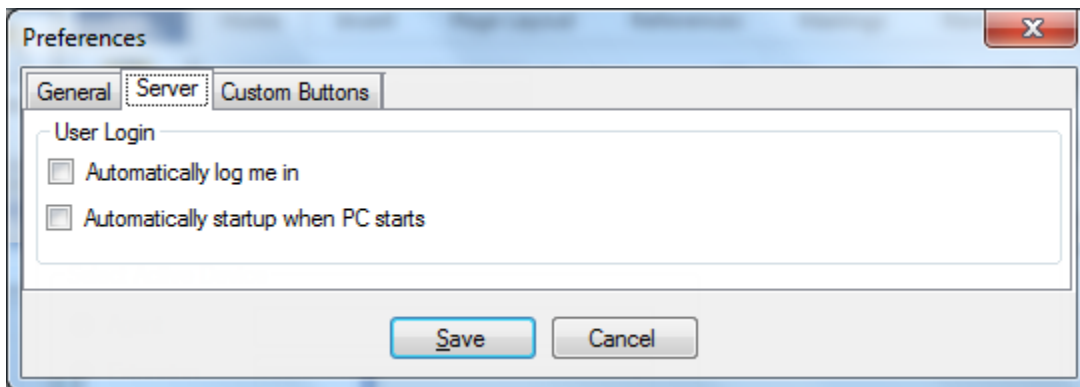
On New Coaching Message: Check the radio button to indicate the desired behavior when you receive a new coaching message.

- *No Visual Notification:* Your application will remain displayed or in the tray. Nothing will change when you receive a new coaching message.

- *Show Roll up Notification:* When you begin a new phone call the application will roll up briefly to indicate you have a new coaching message. It will roll back down automatically.
- *Popup Main Screen:* When a new coaching message arrives the application will popup on your screen. It will not roll down automatically.
- *Play Audio Tone:* Play the selected tone when a new coaching message arrives.

Transparency: Use the slider bar to indicate the desired percentage of transparency for the Desktop Client application.

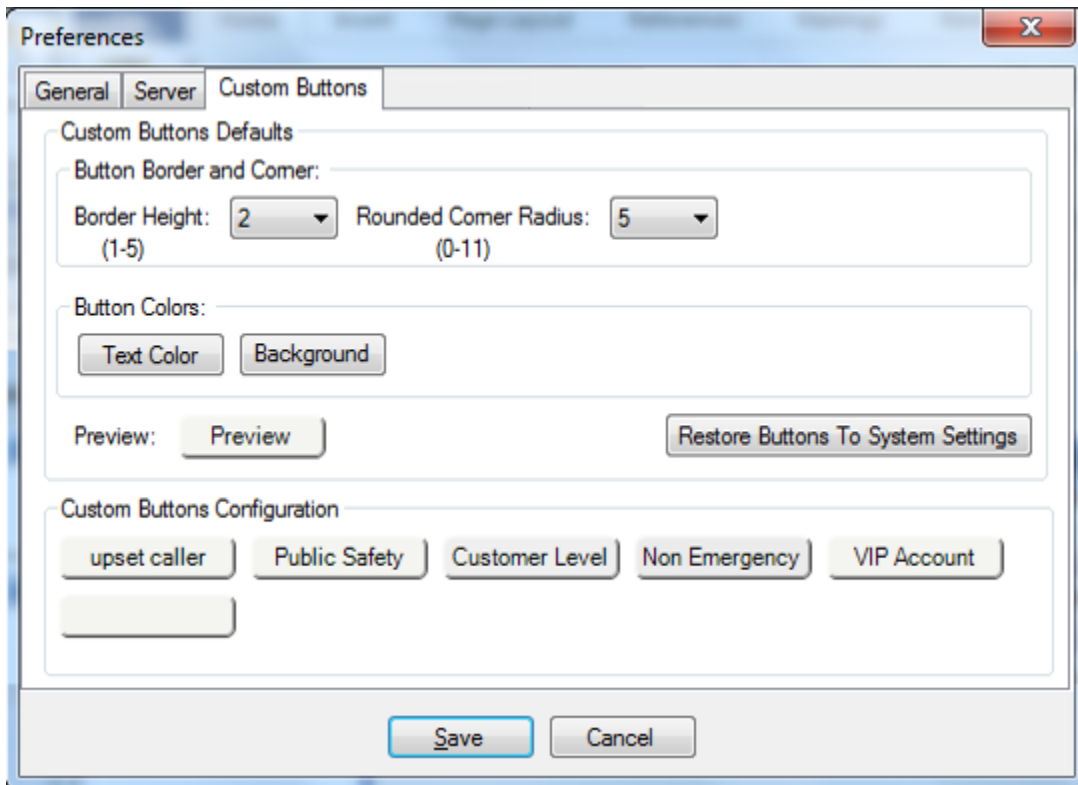
SERVER TAB



User Login: Selections for login behavior.

- *Automatically log me in:* Check this box to indicate you would like to be logged in automatically when the Desktop Client application starts.
- *Automatically startup when the PC starts up:* Check this box to indicate you would like the Desktop Client application to start up automatically when the pc starts.

CUSTOM BUTTONS TAB



Custom Buttons Defaults: Select the desired height for the button borders and corners.

- The height can be from 1 to 5
- The radius can be from 1 to 11

Button Colors: Select the color for the text display on the buttons; select the color for the background display on the buttons. Click the Preview button to view a sample of what your button will look like..



EXIT

Click once to Exit the application.

NOTE: Users must be given the permission to exit the application by an administrator.

VIEW

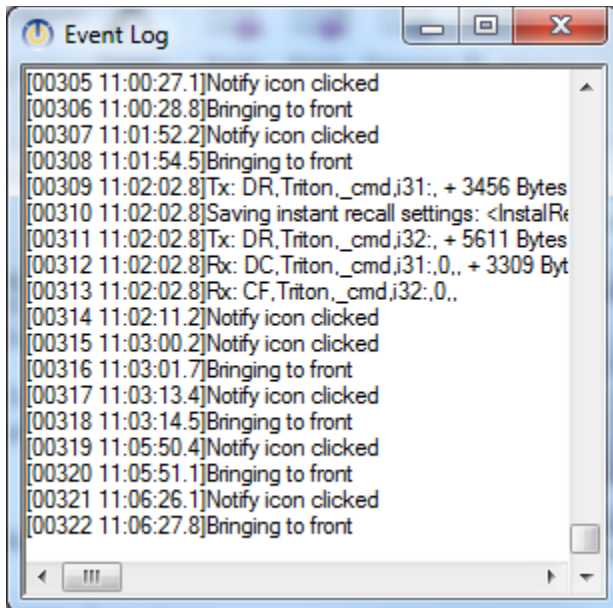
CALL HISTORY

Click once to display the calls in the Historical Calls view.



EVENT LOG

This is used for troubleshooting purposes.



HELP

CONTENTS

Display the contents of the OAISYS Desktop Client application.

ABOUT

Display the current version information.