ACE Direct v2.1

Manager Operations Checklist

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Purpose

- **This checklist demonstrates the ACE Direct functionality for the call center manager.**

- **It provides a step-by-step walkthrough to verify each of the call center manager's operational functions.**
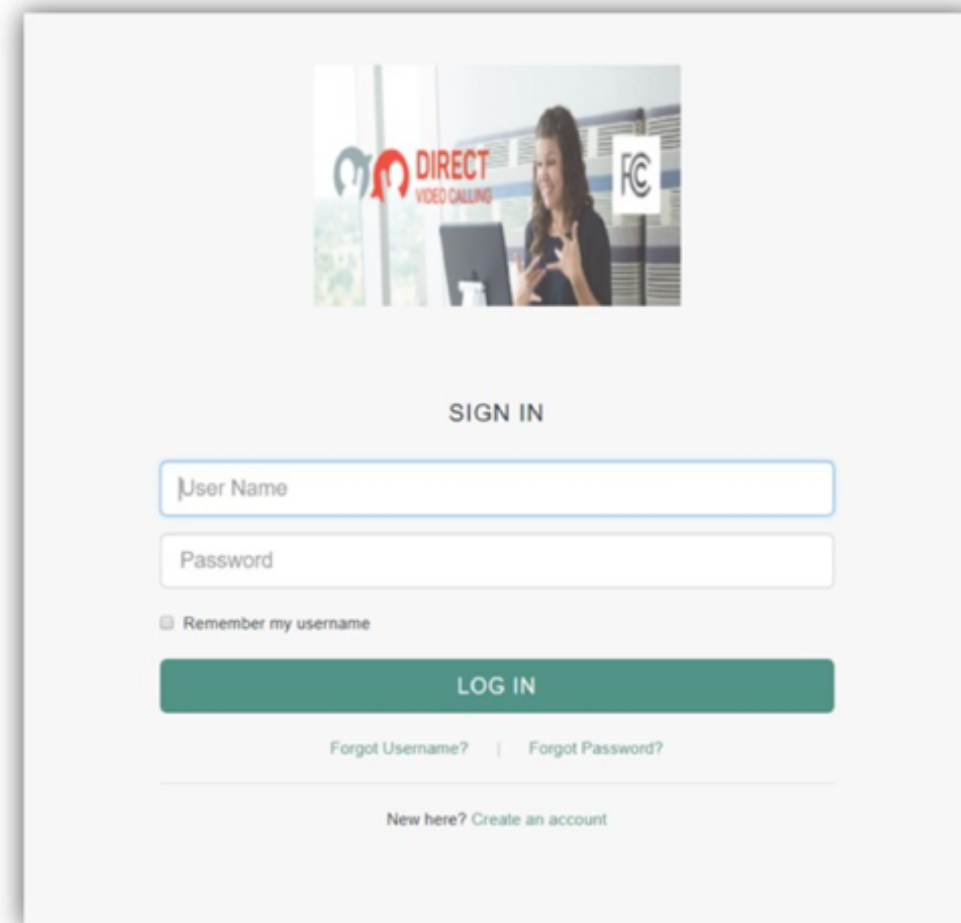
Note: For additional information, please reference the ACE Direct Platform Release Documentation, Release 2.1.

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Step 1: Log in to Manager Portal

Purpose:
Verify account creation process and Log in

1. **Follow the same steps in the Agent Checklist for testing the account creation, and Username/Password Resets.**

2. **Log in to the portal using the Manager credentials.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.9.1

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Step 2: Test Management Dashboard

Purpose:
Verify Management Dashboard metrics are updating

1. **Dashboard metrics will initially be set to zero.**

2. **Have several agents log in to ACE Direct in an "Away" state.**

3. **Place several calls into ACE Direct from both WebRTC and a Provider device.**

4. **Verify that the Agent and Queue metrics are updating appropriately by allowing the queue to build before answering calls.**
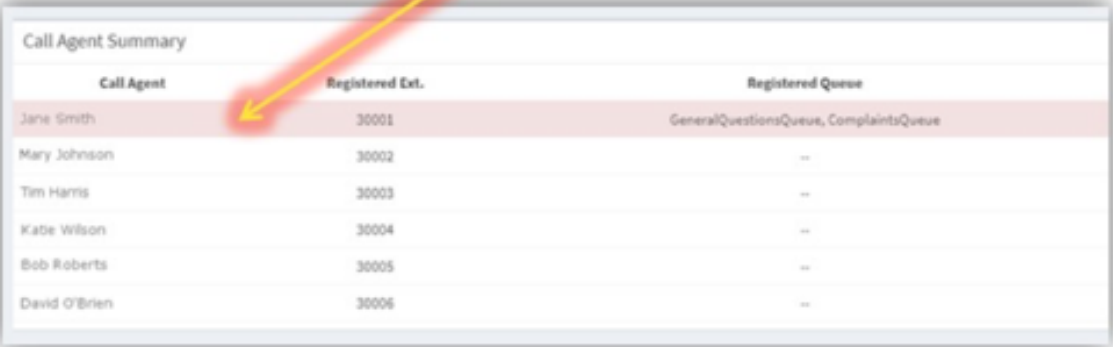

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.1

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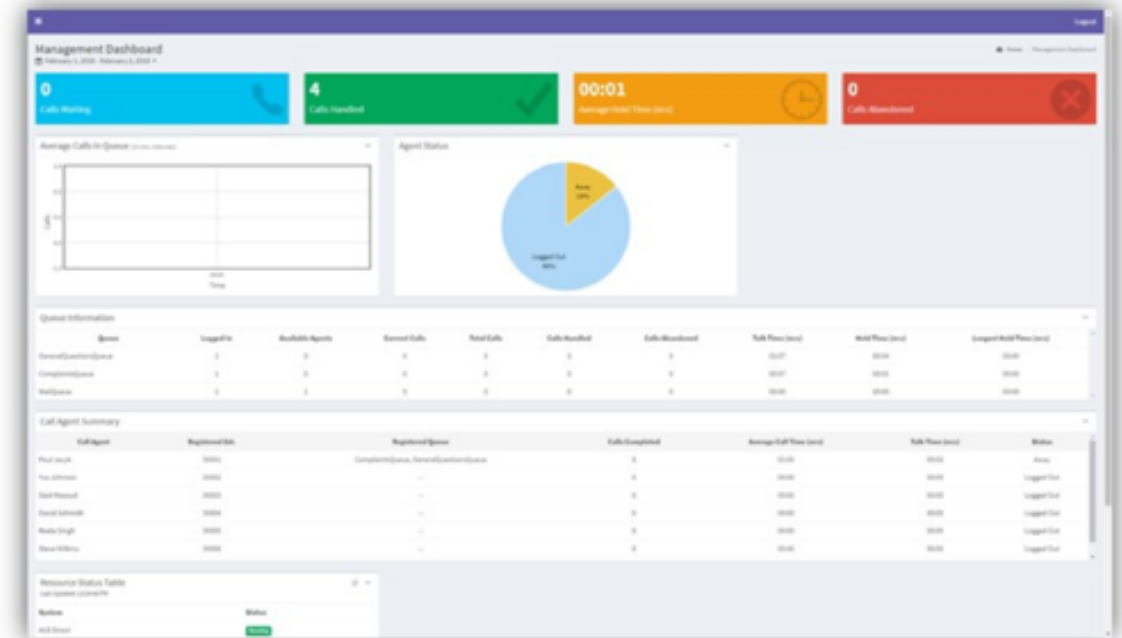
Step 3: Test Agent "Get Help" Request

Purpose:
Verify "Get Help" request triggers notification to Manager

1. **Have an agent select the "Get Help: button on their portal.**

2. **Verify that the agent's name flashes in the Call Agent Summary window.**

3. **Agent's name stops flashing once selected.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.1

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Step 4: CDR Dashboard

Purpose:
Verify Call Detail Records (CDR) Dashboard functionality

1. **Navigate to the CDR Dashboard.**

2. **Test Date Filtering.**

3. **Test number of records shown.**

4. **Test CDR search.**

5. **Verify that the CDR save function works correctly (CSV format).**
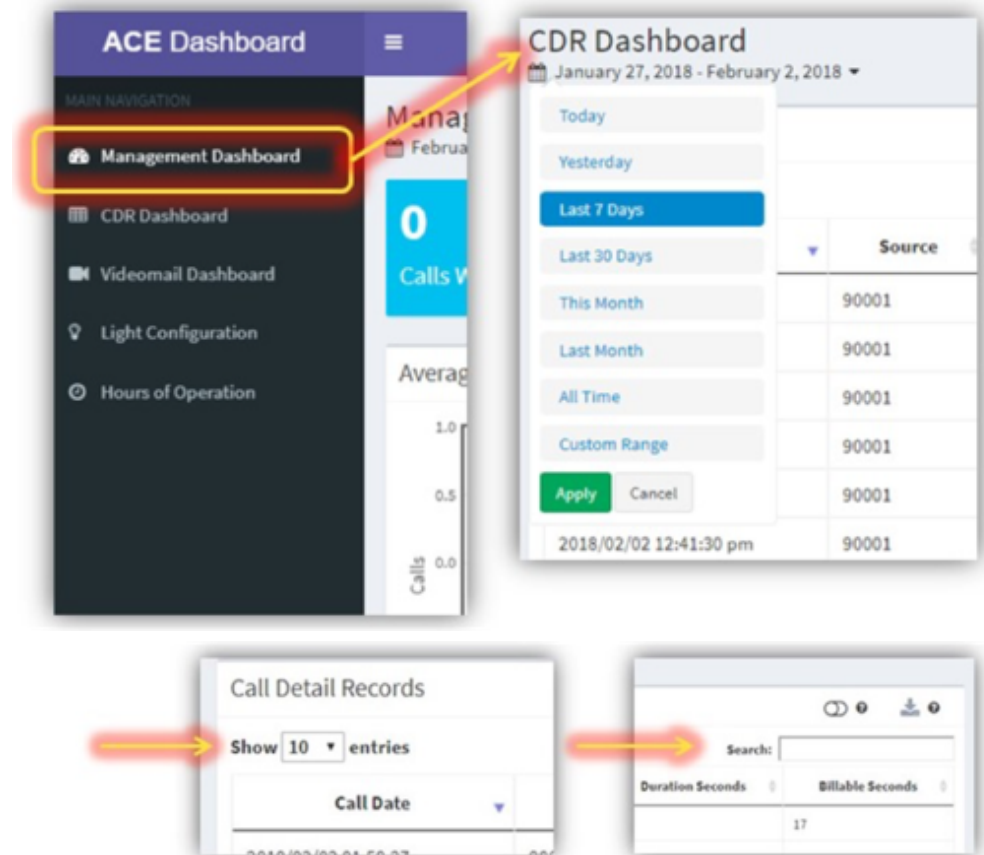
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.2

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Step 5: Video Mail Dashboard

Purpose:
Verify Video Mail records are updating

1. **Navigate to Videomail Dashboard.**

2. **Test "Videomail Status" chart by leaving a video mail message.**

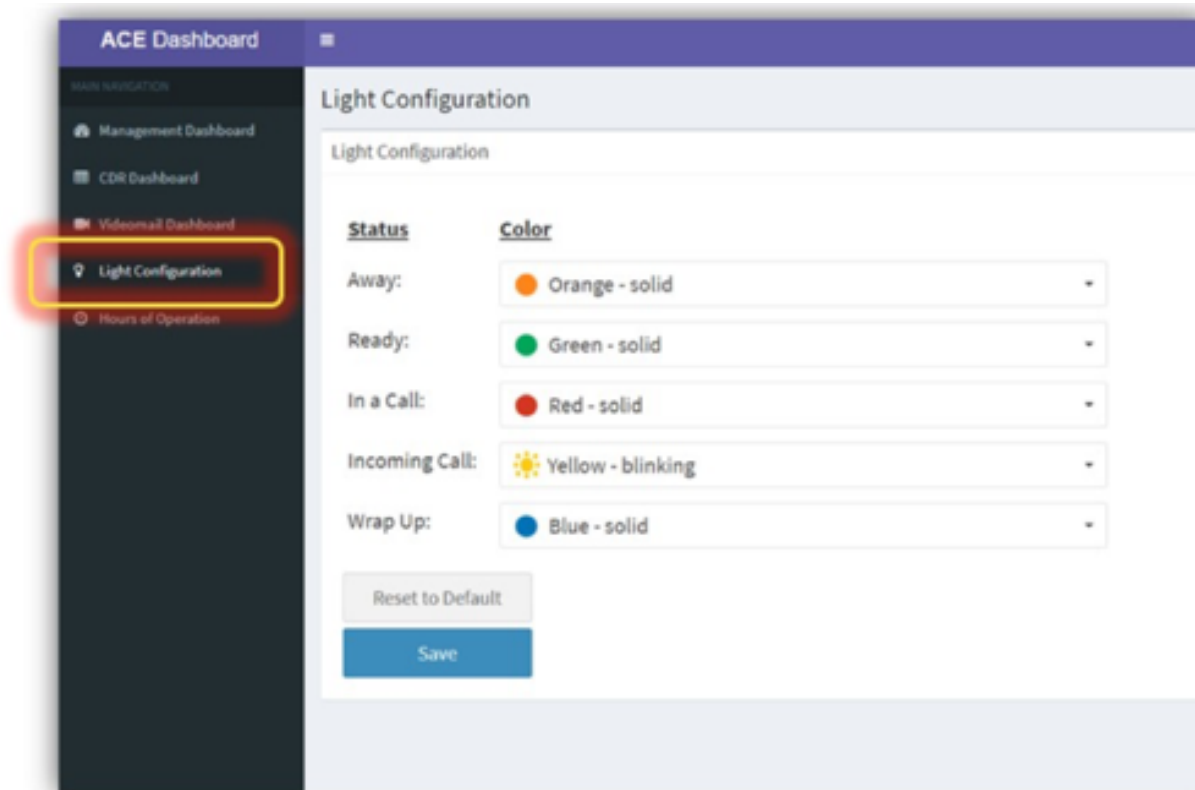3. **Inbox should show all messages and associated data.**
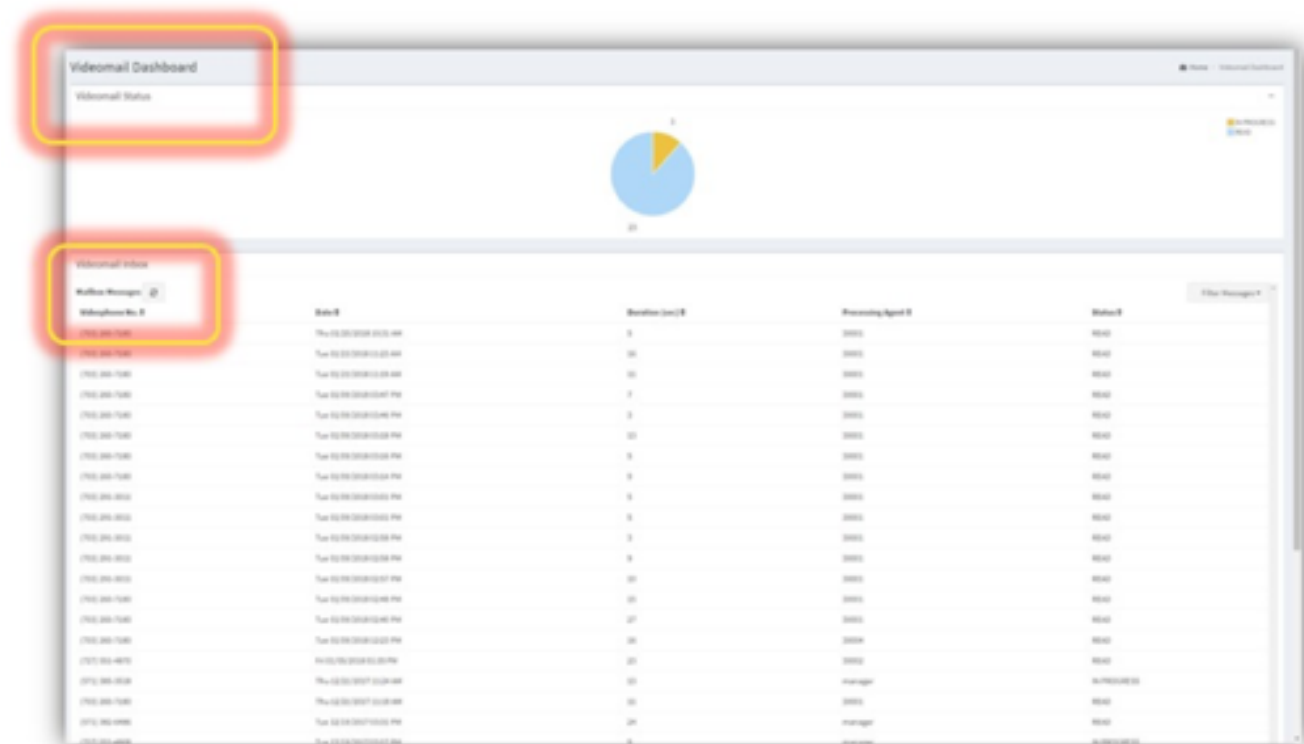
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.3

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Step 6: Light Configuration

Purpose:
Verify status light updates to reflect agent status

1. **Navigate to Light Configuration.**

2. **Change the "Away" status color to verify the light connection works correctly.**

3. **Set desired colors.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.6.2

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Step 7: Hours of Operation

Purpose:
Verify Hours of Operation can be updated

1. **Navigate to Hours of Operation.**

2. **Alter hours of operation to after hours and verify correct operation.**

3. **Verify operation status is depicted on top portion of window.**

ACE Direct Platform Release Documentation Release 2.1
Subsection 2.8.4

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Step 10: WebRTC and Provider Device Video Calls

Purpose:
Verify WebRTC and call metrics are working correctly

1. Change the agent's status to "Ready" to start accepting calls. Place a WebRTC call to ensure connectivity.

2. Test the Real-Time Text chat.

3. Messages from both parties are visible in the chat window. The text from the other party should be visible as that party types and before the message is committed to the chat.

4. Place a call to ACE Direct from a provider device to ensure connectivity.

5. Verify call metrics are changing appropriately.

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