ACE Direct v2.1

Agent Operations Checklist

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Purpose

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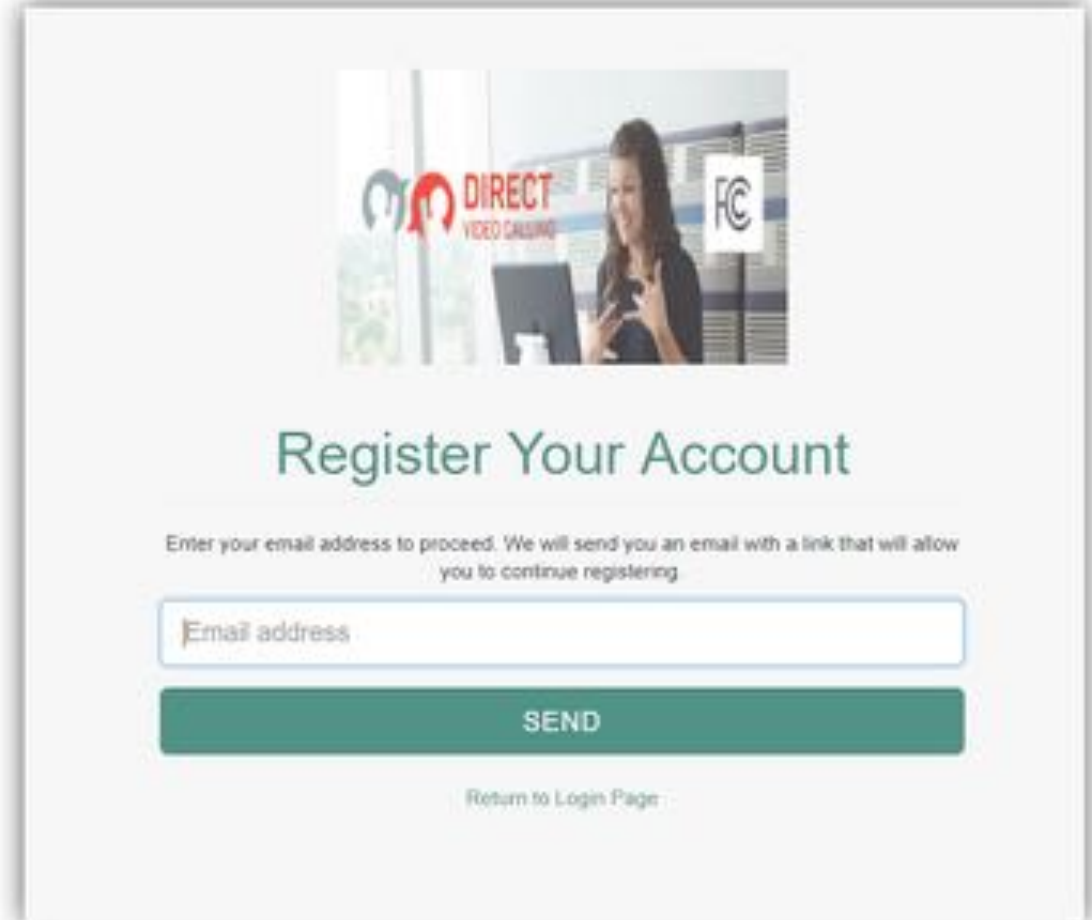
Note: For additional information, please reference the ACE Direct Platform Release Documentation, Release 2.1.

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Step 1: Create Agent Account

Purpose:
Verify account creation process

1. **Click on "Create an account".**

2. **Submit a request for a new agent account by entering your email address.**

3. **You should receive an email from your administrator with a link that allows you to continue the registering process.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.9.1

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Step 2: Test Username and Password Resets

Purpose:
Verify the ability to retrieve usernames or reset passwords

1. **Click on "Forgot Username".**

2. **Submit your email or full name to receive an email containing your username.**

3. **Click on "Forgot Password".**

4. **Submit your username, email, or full name to receive an email with a temporary password.**

5. **You will need to change your password upon logging in.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.9.1

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Step 3: Log in to Agent Portal

Purpose:
Verify agent account creation and login

1. **Log into the agent portal.**

2. **The agent's name and picture should appear on the top of the left-side panel as well as the top right of the header (next to the mail icon).**
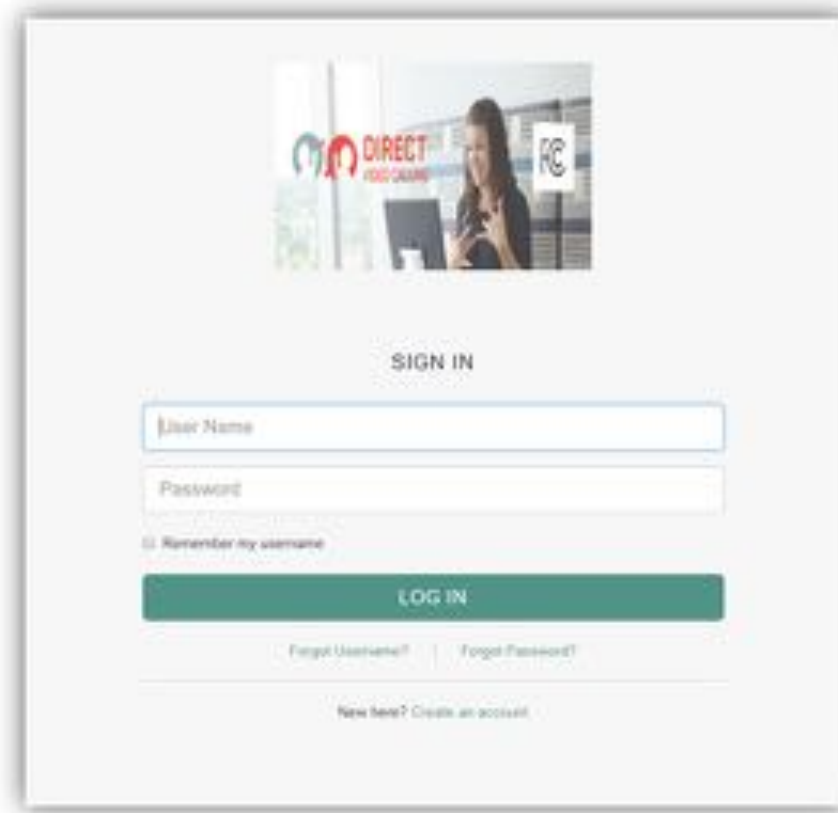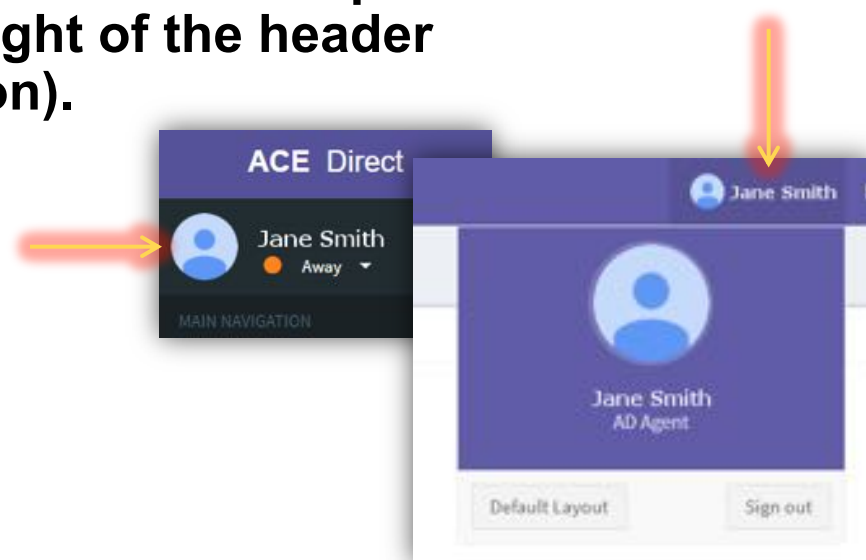
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.4.2

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Step 4: Video and Chat Window Resizing

Purpose:
Verify windows resize and can be rearranged

1. **Select the bottom right corner of either the video or chat windows. An arrow will appear allowing you to resize the window.**

2. **Select a window by clicking on its header and moving it to another area of the ACE Direct page.**
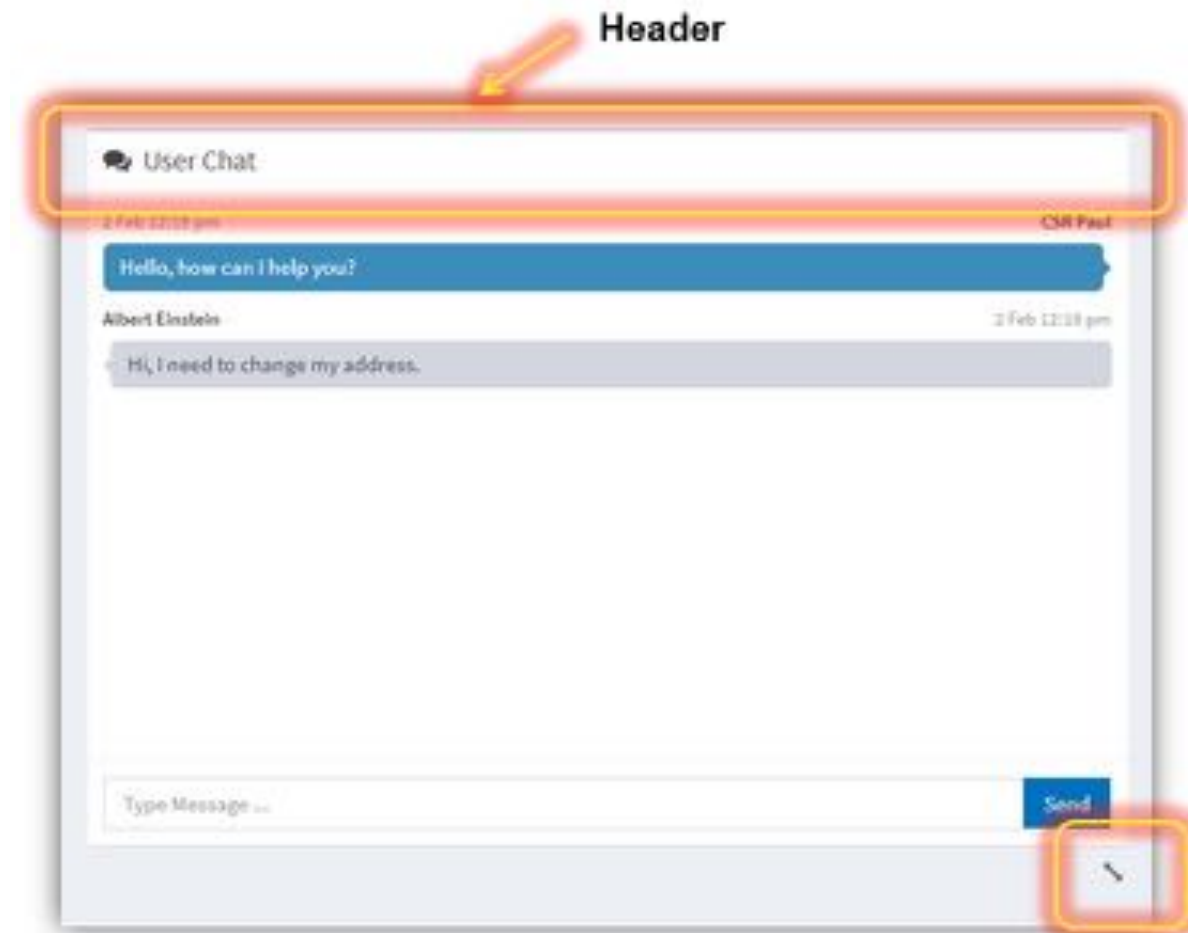
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.3

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Step 5: Active Agent

Purpose:
Verify Right-side Panel and Active Agents functionality

1. **Select the gears icon in the top right corner.**

2. **Right-side panel will be displayed with a list of all online agents, their status, extension, and queue they are currently assigned to.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.2.2

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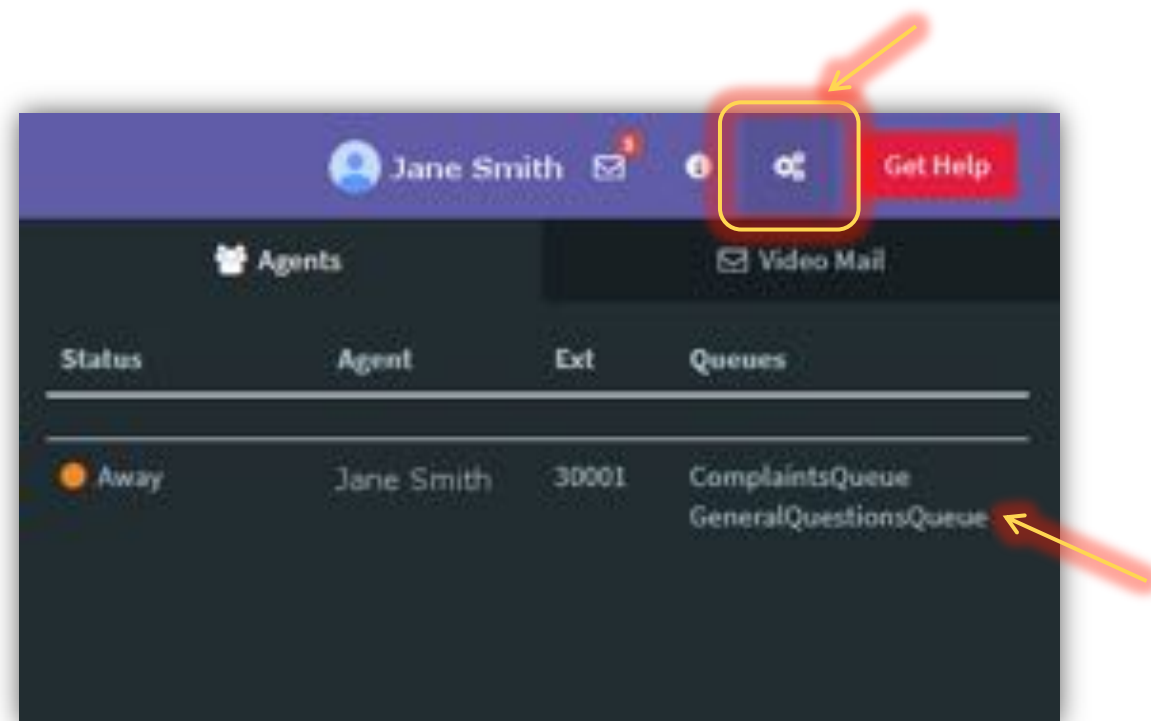
Step 6: "Get Help" Request

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

1. Select the "Get Help" button located on the top right of the agent portal.

2. The agent's name will flash on the Manager portal.

3. The agent's name flashes until selected.

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.4.1

Agent View

Jane Smith Get Help
Home   AD Desktop

Manager View

Call Agent Summary

| Call Agent	Registered Ext.	Registered Queue
Jane Smith	30001	GeneralQuestionsQueue, ComplaintsQueue
Mary Johnson	30002	--
Tim Harris	30003	--
Katie Wilson	30004	--
Bob Roberts	30005	--
David O'Brien	30006	--

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Step 7: Video Mail

Purpose:
Verify Right-side Panel and Video Mail functionality

1. **Use WebRTC to leave a video mail message. This will cause a counter to be displayed on the video mail icon and show a new unread message in the video mail list.**

2. **Select the video mail icon located in the top right corner of the agent portal. This will open the right-side panel and display the list video mail files.**

3. **Select a video mail message. This will play to the message in the video chat window.**

4. **Test the video mail callback.**

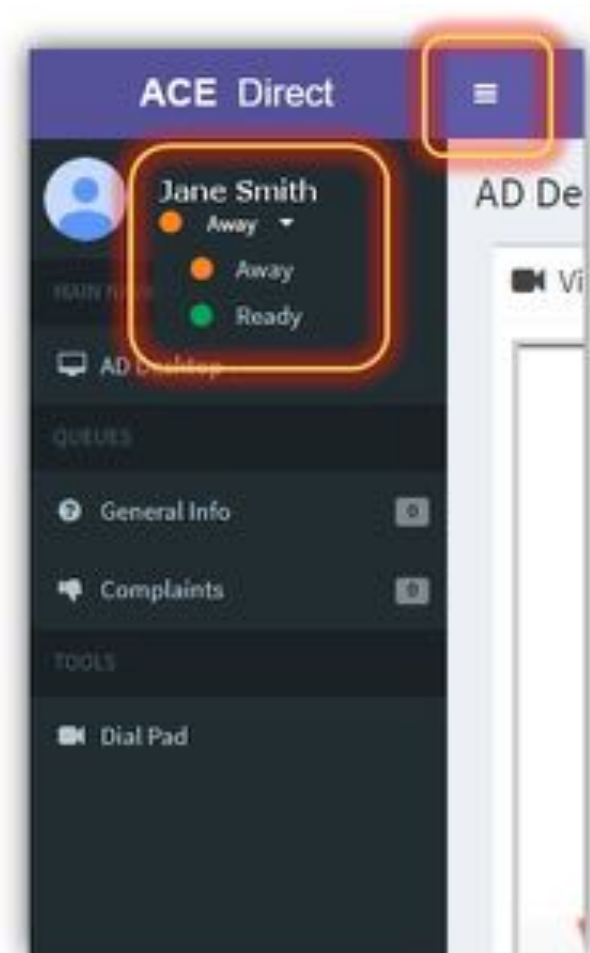ACE Direct Platform Release Documentation Release 2.1
Subsection 2.5.2.2

MITRE
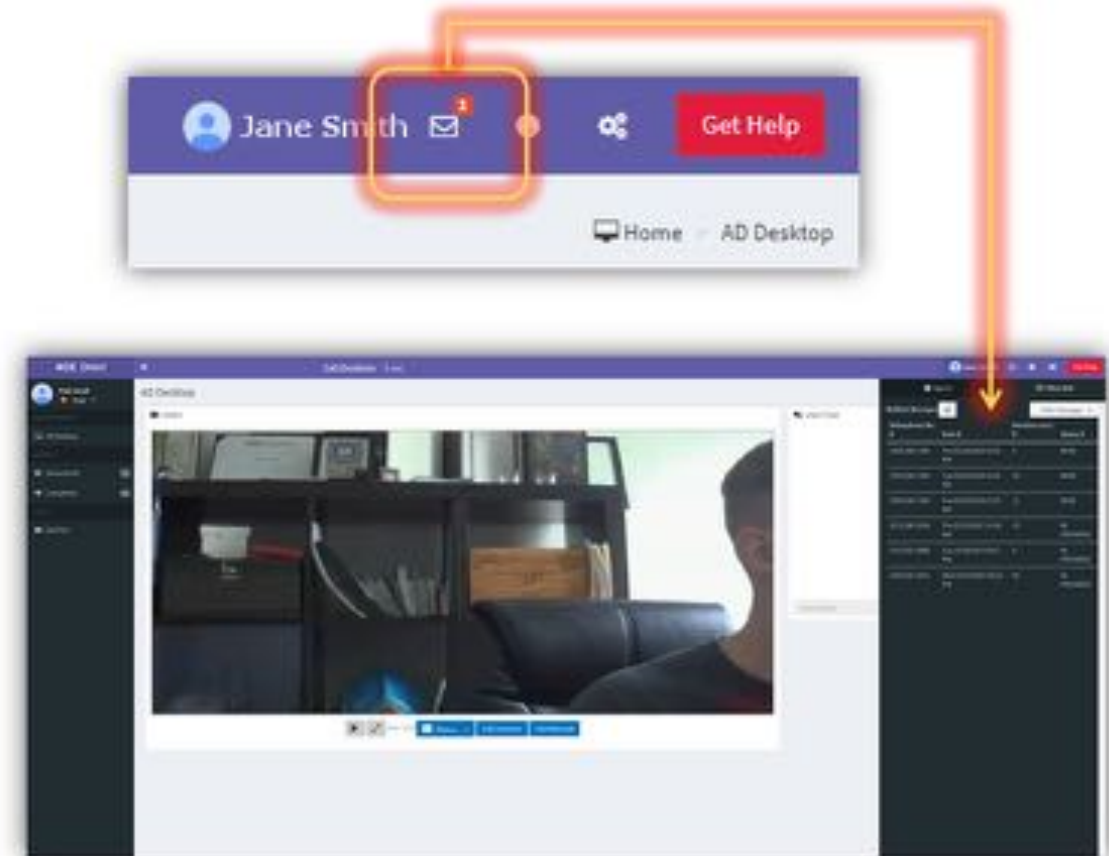
Step 8: Agent Status

Purpose:
Verify Left-side Panel and Agent Status functionality

1. Select the "hamburger" icon in the top left to collapse or open the left side panel.

2. Change the agent's status from Away to Ready using the drop down below the agent's name in the left side panel.

3. The BusyLight color changes to reflect the agent's status, e.g., Away = red, Ready = green.
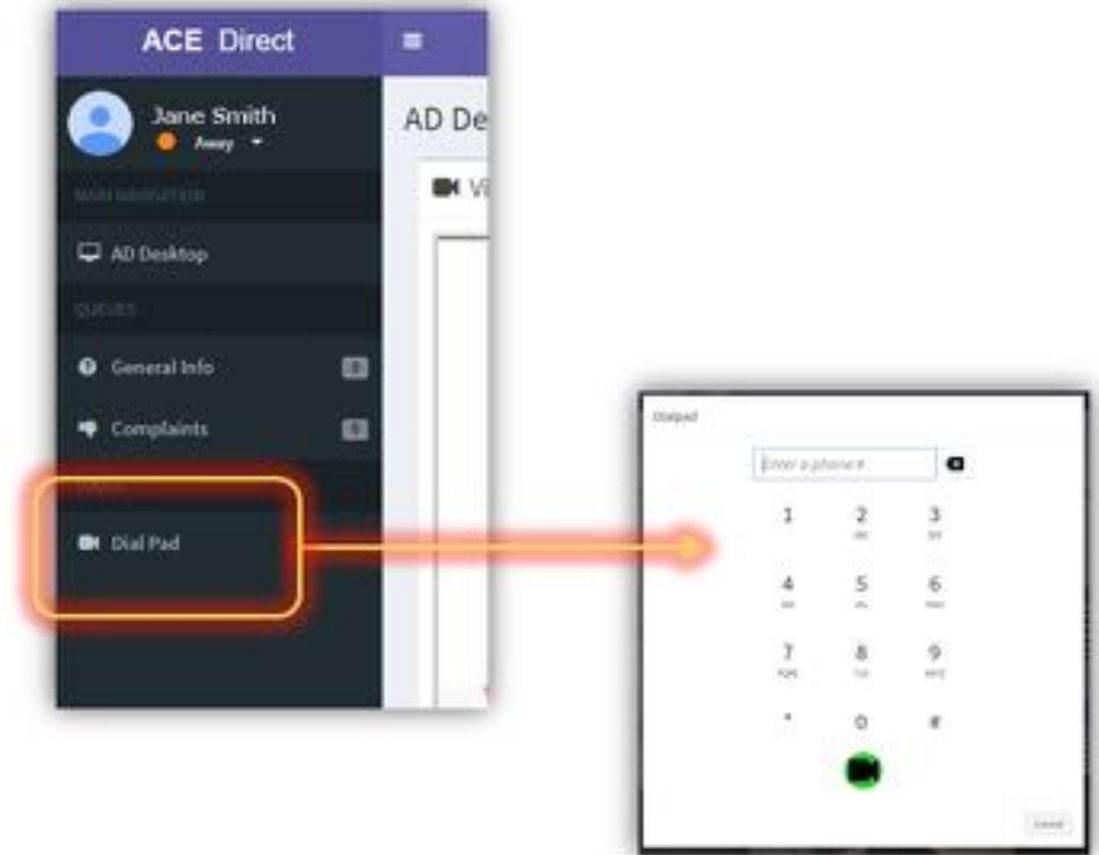
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.2.1

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Step 9: Dialpad

Purpose:
Verify the ability to perform outbound calling

1. **Using the Dialpad located in the left-side panel place an outbound call to a provider device.**

2. **The Dialpad appears to the agent in the middle of the screen.**

3. **The call appears within the video chat window.**

ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.5.2.1

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Step 10: WebRTC and Provider Device Video Calls

Purpose:
Verify video and text communications are working

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 they are typing and before the message is committed to the chat.

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

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