

Transaction-Codes

Purpose

Transaction codes are used to tag calls.

Examples:

- During a call the agent ascertains that the caller requires special advice. A transaction code can be used to tag this call for statistical purposes. If a tarif prompt is associated with the transaction code, then it can cause the call to be charged differently after this point in time.
- The caller issues a complaint during the call. The agent can tag the call with a call marker representing a complaint.

Configuration

Choose **ACD - Transaction Codes** in the main menu, to view the table of available transaction codes.

To create a new transaction code, click on **New** in the toolbar. Provide the following information:

Name	The name of the transaction code
Tarif Prompt	Choose a tarif prompt to be associated with the transaction code. This prompt will be played by the system when the transaction code is selected by the agent.
Active	This activates the transaction code. Only active transaction codes are visible by agents.
Display Order	This parameter determines the position in the list at which the transaction code will be shown. You can choose between 1 (first position), 2 (second position) and at end. This enables you to order the transaction codes in a sensible way. The order of the transaction codes corresponds to the order of the transaction codes shown in Agent Home , and also the order in which transaction codes are sent across the SOAP interface to external applications.

After entry click on **Save**. You will return to the overview table of the transaction codes.

Use the tabs **Matrix** and **List** to switch between two views:

Matrix

For the configured transaction codes, DTMF code sequences are displayed. The DTMF codes are used by agents to activate transaction codes using the telephone keypad. Individual ACD groups can use different transaction codes. Clicking in a column on a number or the dash sign enables you to edit the setting at that cell.

Row order can be changed using **Up** and **Down**. This results in a change in the *display order* of the transaction codes.

List

The list shows you the properties of the transaction codes. Row order can be changed using **Up** and **Down**. This results in a change in the *display order* of the transaction codes.

Use **Edit** to modify a transaction code. The tab **Groups** can be used to view the ACD groups which use that transaction code. Use **Add** to enable further groups to use the call marker and assign a DTMF code to this association. Use **Delete** to remove the association between an ACD group and a transaction code.

Function

Transaction Codes are displayed during a call (or after a call bei mandatory transaction codes) in agent home and the mini client, and can be set according to the settings of the ACD group.

See [Editing groups and creating rules](#).

For mandatory transaction codes agents receive no further calls or media events, until a transaction code is set by the agent.

Info



When optional transaction codes are configured, not entering one after a call has ended, will result in the call being displayed in red in the calls tab in the agent home.

Call Transfer

For call transfers to other agents, the transaction code settings of the ACD group apply to both agents. Hence if mandatory transaction codes are set in the ACD group, then both agents will be required to set a transaction code.

For call transfer to other ACD groups, the functionality is dependent on the ACD group settings, the transaction codes seen and required by each agent can be seen in the table below.

Incoming Call to Group	Transfer To Group		
	Standalone Group B no TACs	Standalone Group B with TACs	Agent Group
Standalone Group A no TACs	Agent A: no TACs	Agent A: no TACs	Both Agents: no TACs
	Agent B: no TACs	Agent B: TACs from B	
Standalone Group A with TACs	Agent A: TACs from A	Agent A: TACs from A	Both Agents: TACs from A
	Agent B: no TACs	Agent B: TACs from B	
Configuration Group A no TACs	Agent A: no TACs	Agent A: no TACs	Both Agents: no TACs
	Agent B: no TACs	Agent B: TACs from B	
Configuration Group A with TACs	Agent A: TACs from A	Agent A: TACs from A	Both Agents: TACs from A
	Agent B: no TACs	Agent B: TACs from B	

Note: for forwarding to agent groups, the configuration will not change, so the TAC settings will not change.