more than just talk

lightspeed®
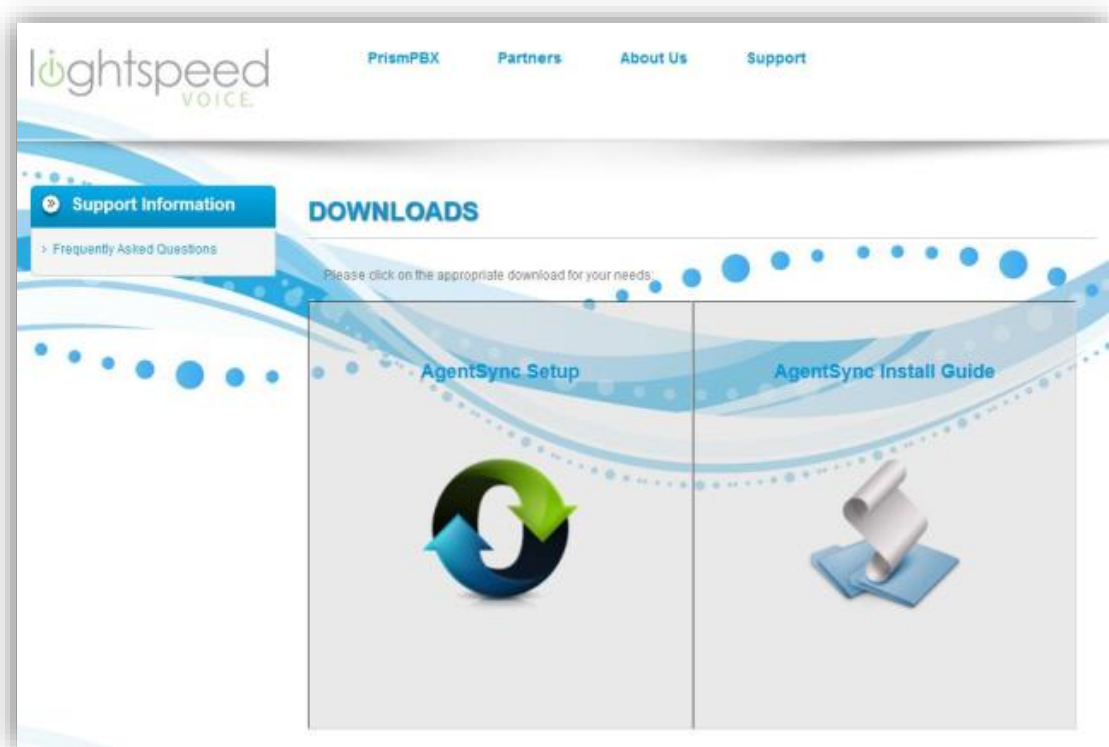
AgentSync Guide

Introduction

AgentSync is an application provided by Lightspeed Voice that allows your computer to pop up a window or application to a customer or prospect when receiving an inbound call.

Installation

AgentSync Installation

To get AgentSync downloaded visit the page found here:

http://www.lightspeedvoice.com/download
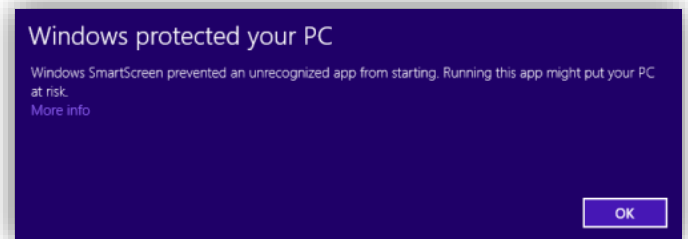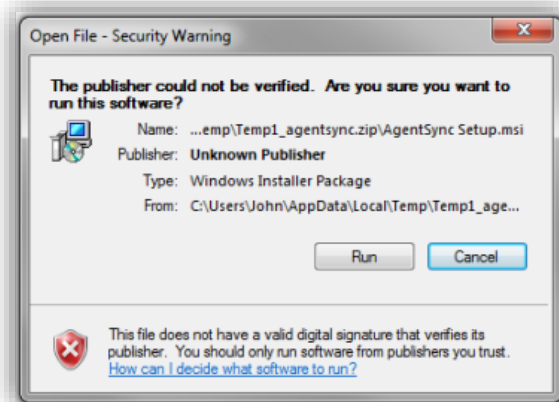
Once downloaded you will need to open the Zip file, one of the following two windows may appears asking you to allow this.


Once the folder is open you will need to run the "Agent Sync Setup.msi" file found inside. It may prompt you to run the file or you may run into the newer Windows smart screen which will require you to select more info before running.

You will be prompted to select "Next" a few times before installation is complete.
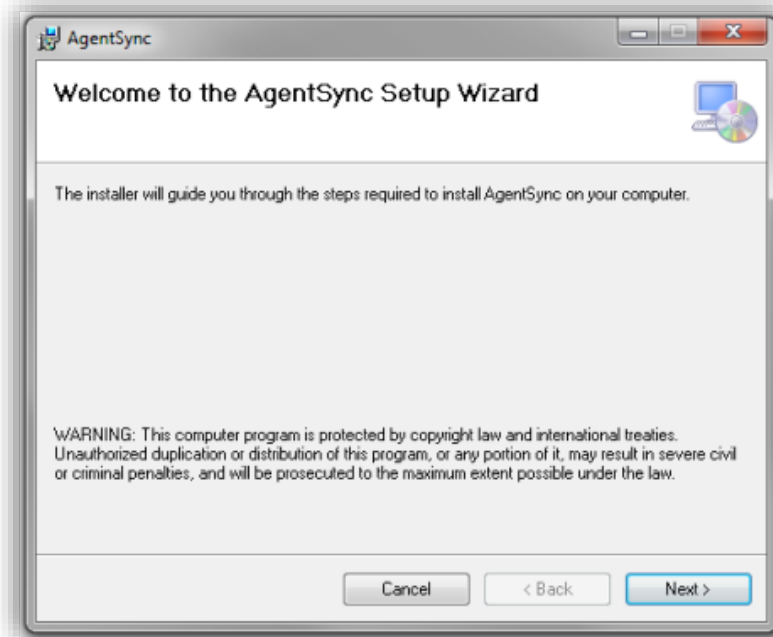
Once installation is complete you will need to configure your settings.
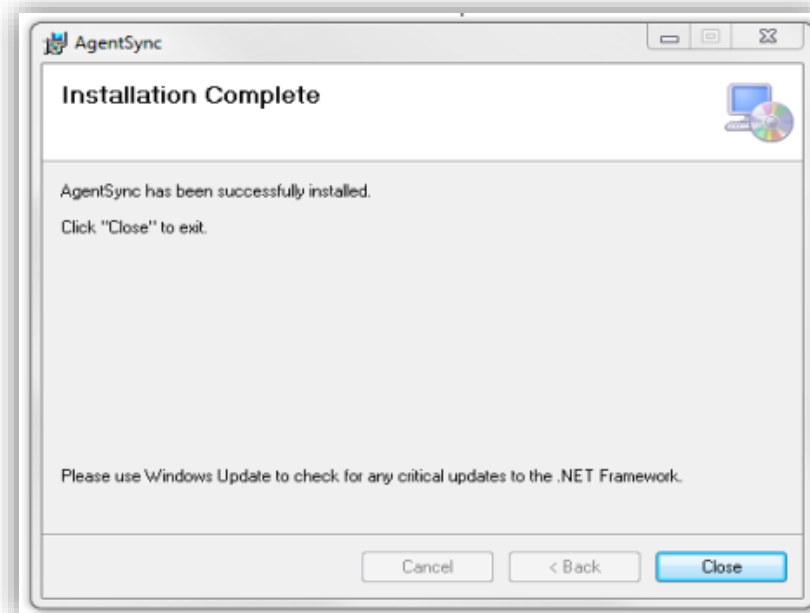
AgentSync Configuration

Once installed you will need to run it the first time from the start menu or from the desktop.

If it doesn't pop open the window click the up arrow or the expand option found in the task bar and locate the Lightspeed Voice icon and double click it.
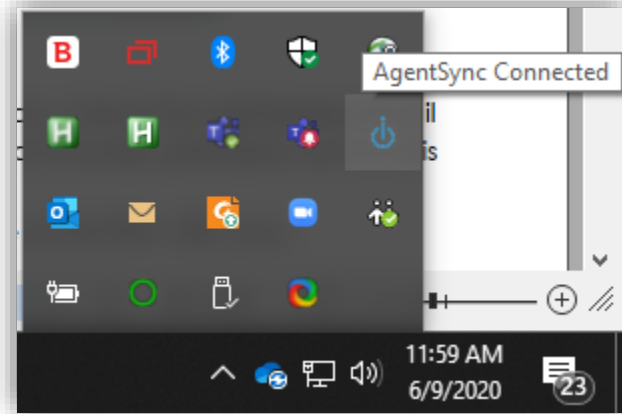
You will need to enter your extension and voicemail password as well as the AMS/CRM URL that will be used to open the prospects, if you don't know what that URL should be, reference the guides provided for that AMS/CRM solution or reach out to Lightspeed Voice and speak with a client success team member.
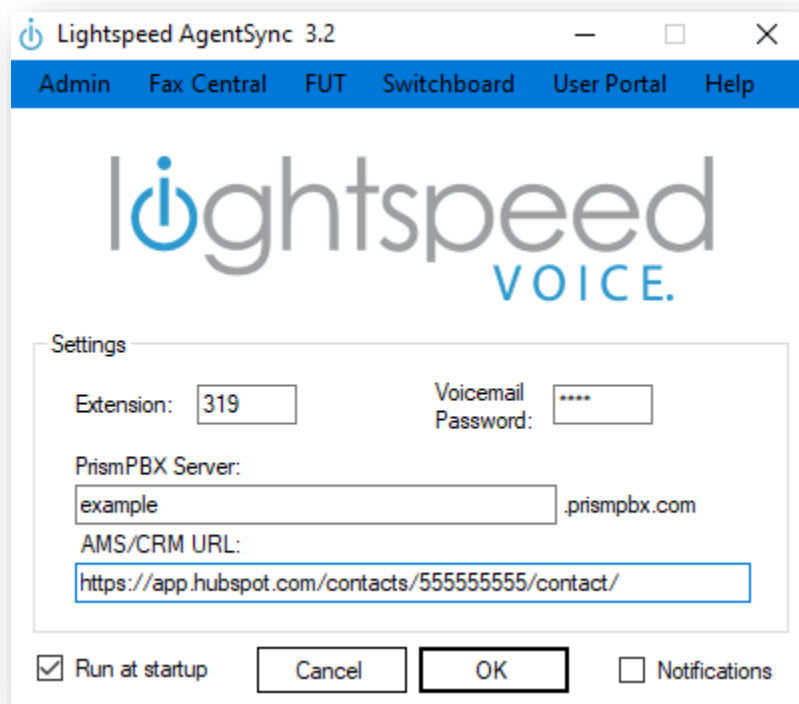
By default the application will have "Run at startup" enabled, this is the suggested setting. If you would like to disable that just uncheck it.

The other option is "Notifications", checking that will pop up Windows notifications in the bottom right hand corner of the screen when calls come in.

Click to Call

Using Right Click to Call

AgentSync will allow you to use right click to call when using Internet Explorer. This is done by highlighting any phone number and right clicking on it, in the drop-down menu you will see the option to "call".
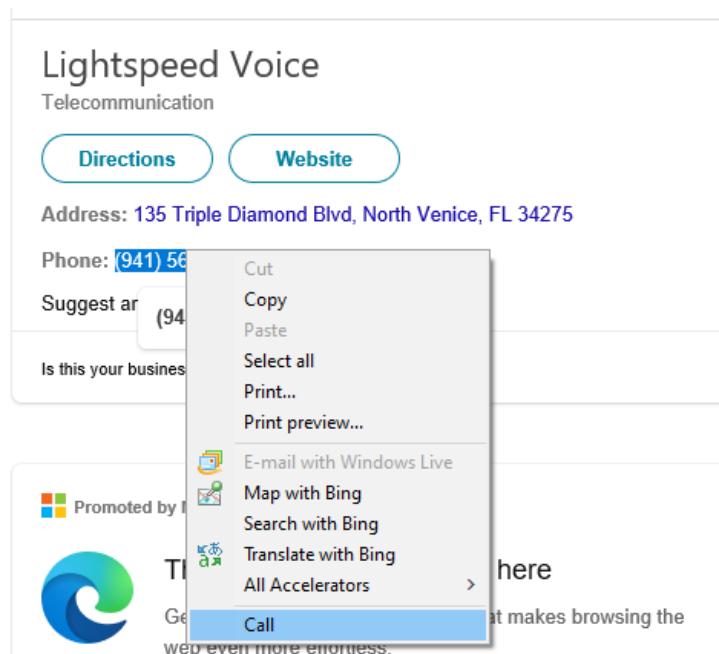
Troubleshooting

If you're having issues with call pops ensure that AgentSync is running. You can verify it's running by using the "Show hidden icons" in the taskbar of Windows, if you see an icon like the one highlighted on the right and it says AgentSync Connected it is running. If you're having trouble with calls logging in. If right click to call isn't working try restarting Internet Explorer. If issues persist, please give us a call!