AVAYA

Using Agent Desktop for Avaya Contact Center Select

Contents

Chapter 1: Introduction

Purpose

This guide describes the tasks that Avaya Contact Center Select agents can perform using Agent Desktop.

Intended audience

This guide is for contact center agents and supervisors who use Agent Desktop in an Avaya Contact Center Select solution.

Related resources

Avaya Contact Center Select documentation

The following table lists the documents related to Avaya Contact Center Select. Download the documents from the Avaya Support website at https://support.avaya.com.

Title	Document purpose	Audience
Overview		
Avaya Contact Center Select Solution Description	This document provides a technical description of Avaya Contact Center Select. It describes the product features, specifications, licensing, and interoperability with other supported products.	Customers and sales, services, and support personnel
Avaya Contact Center Select Documentation Catalog	This document describes available Avaya Contact Center Select documentation resources and indicates the type of information in each document.	Customers and sales, services, and support personnel

Table continues…

Title	Document purpose	Audience
Contact Center Performance Management Data Dictionary	This document contains reference tables that describe the statistics and data in the historical and real-time reports generated in Contact Center.	System administrators and contact center supervisors
Implementing		
Deploying Avaya Contact Center Select DVD	This document contains information about Avaya Contact Center Select DVD installation, initial configuration, and verification. This document contains information about maintaining and troubleshooting the Avaya Contact Center Select server.	Implementation personnel
Deploying Avaya Contact Center Select Software Appliance	This document contains information about Avaya Contact Center Select Software Appliance (VMware) preparation, deployment, initial configuration, and verification. This document contains information about maintaining and troubleshooting the software appliance.	Implementation personnel
Deploying Avaya Contact Center Select Hardware Appliance	This document contains information about Avaya Contact Center Select Hardware Appliance (physical server) installation, initial configuration, and verification. This document contains information about maintaining and troubleshooting the hardware appliance.	Implementation personnel
Deploying Avaya Contact Center Select on Microsoft Azure	This document contains information about deploying Avaya Contact Center Select using an ISO image on Microsoft Azure.	Implementation personnel
Avaya Contact Center Select Business Continuity	This document contains information about deploying Avaya Contact Center Select Business Continuity.	Implementation personnel
Upgrading and patching Avaya Contact Center Select	This document contains information about upgrading and patching Avaya Contact Center Select.	Implementation personnel and system administrators
Administering		
Administering Avaya Contact Center Select	This document contains information and procedures to configure the users, skillsets, and contact center configuration data. This document contains information about creating Avaya Contact Center Select real-time and historical reports.	System administrators and contact center supervisors

Table continues…

Comments on this document?

Title	Document purpose	Audience
Avaya Contact Center Select Advanced Administration	This document contains information about managing the Avaya Contact Center Select server, licensing, and multimedia configuration.	System administrators
Using Contact Center Orchestration Designer	This document contains information and procedures to configure script and flow applications in Contact Center Orchestration Designer.	System administrators
Maintaining		
Contact Center Event Codes	This document contains a list of errors in the Contact Center suite and recommendations to resolve them. This document is a Microsoft Excel spreadsheet.	System administrators and support personnel
Using		
Using Agent Desktop for Avaya Contact Center Select	This document provides information and procedures for agents who use the Agent Desktop application to accept, manage, and close contacts of all media types in Contact Center.	Contact center agents and supervisors
Using the Contact Center Agent Browser application	This document provides information and procedures for agents who use the Agent Browser application to log on to Contact Center and perform basic tasks.	Contact center agents
Using Avaya Workspaces for AACC and ACCS	This document describes the tasks that Contact Center agents can perform using Avaya Workspaces.	Contact center agents and supervisors
Release Notes		
Avaya Contact Center Select Release Notes	The Release Notes contain information about known issues, patches, and workarounds.	System administrators and support personnel

Finding documents on the Avaya Support website

Procedure

1. Go to https://support.avaya.com.

2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.

3. Click **Product Support** > **Documents**.

4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.

5. In **Select Release**, select the appropriate release number.

This field is not available if there is only one release for the product.

6. **(Optional)** In **Enter Keyword**, type keywords for your search.

7. From the **Select Content Type** list, select one or more content types.

   For example, if you only want to see user guides, click **User Guides** in the **Select Content Type** list.

8. Click $\mathbb{Q}$ to display the search results.

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

- To find videos on the Avaya Support website, go to https://support.avaya.com/ and do one of the following:
  - In **Search**, type `Avaya Mentor Videos`, click **Clear All** and select **Video** in the **Select Content Type**.
  - In **Search**, type the product name. On the Search Results page, click **Clear All** and select **Video** in the **Select Content Type**.

    The **Video** content type is displayed only when videos are available for that product.

  In the right pane, the page displays a list of available videos.

- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and do one of the following:
  - Enter a keyword or keywords in the **Search Channel** to search for a specific product or topic.
  - Scroll down Playlists, and click a topic name to see the list of videos available. For example, Contact Centers.

  ✳ **Note:**

    Videos are not available for all products.

Support

Go to the Avaya Support website at https://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service

request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Chapter 2: Changes in this release

The following sections outline new features and other changes in *Using Agent Desktop for Avaya Contact Center Select* for Release 7.1.x.

Features

New features in Release 7.1 base build

For information about new features in the Release 7.1 base build, see [Support for Enterprise Web Chat](#) on page 15.

New features in Release 7.1 Service Packs 1, 2, and 3

There are no new features in these Release 7.1 Service Packs.

New features in Release 7.1 Feature Pack 1

There are no new features in Release 7.1 Feature Pack 1.

New features in Release 7.1 Feature Pack 2

For information about new features in Release 7.1 Feature Pack 2, see [Microsoft Edge support in Agent Desktop](#) on page 16.

New features in Release 7.1 Feature Pack 2 Post GA Patches

For information about new features in Release 7.1 Feature Pack 2 Post GA Patches, see [Avaya Contact Center Select Release 7.1 Feature Pack 2 Post GA Patches supports Microsoft Windows 11](#) on page 16.

New features in Release 7.1.2 Service Pack 2

For information about new Avaya Workspaces features in Release 7.1.2 Service Pack 2, see [Avaya Workspaces features for Release 7.1.2.2](#) on page 16.

Support for Enterprise Web Chat

From Release 7.1, Avaya Contact Center Select supports Enterprise Web Chat (EWC). Agent Desktop provides two services for web chat: Web Communications web chat and EWC. EWC can support higher capacities than Web Communications.

Comments on this document?

> ⊛ **Note:**
>
> If you migrate from an existing Web Communications chat solution to the EWC chat solution, you must redevelop your custom interfaces to integrate with EWC.

Microsoft Edge support in Agent Desktop

From Release 7.1 Feature Pack 2, Agent Desktop uses the Microsoft Edge browser as a rendering engine to display web content. In a Microsoft Edge browser, to display websites that are compatible with Internet Explorer, you must enable the IE mode for Agent Desktop by using a new functionality in Contact Center Multimedia Administration. This feature requires the installation of Microsoft Edge WebView Runtime.

You can also install and start Agent Desktop using Microsoft Edge.

Avaya Contact Center Select Release 7.1 Feature Pack 2 Post GA Patches supports Microsoft Windows 11

From Release 7.1 Feature Pack 2 Post GA Patches, Avaya Contact Center Select supports Microsoft Windows 11 for Avaya Agent Desktop, Contact Center Manager Administration, Contact Center Multimedia Administration, and Communication Control Toolkit.

Avaya Workspaces features for Release 7.1.2.2

Release 7.1.2.2 introduces the following Avaya Workspaces features for Avaya Aura® Contact Center (AACC) and Avaya Contact Center Select (ACCS). For more information about Avaya Workspaces features, see *Using Avaya Workspaces for AACC and ACCS*.

Consult, transfer, and conference options for web chat

You can consult with another agent during a chat interaction. Messages between agents are whispered so the customer does not see them.

If the other agent agrees, you can do one of the following when ending the consultation:

- Transfer the web chat to the other agent.
- Start a conference.

Observe web chat

A supervisor can observe a chat interaction from the My Agents widget.

Whisper coaching during web chat

While observing a chat interaction, the supervisor can start coaching. During the coaching session, the supervisor can whisper guidance to the agent. The customer does not see whispered messages.

Barge in to web chat

A supervisor can barge in to the chat interaction and communicate with the customer directly.

Email approval

A supervisor can approve or reject an email and add review comments. The agent can edit the email and add comments if it is rejected.

Reschedule email

You can postpone work on an email and reschedule it for a later time. This is a useful option if you need more time to gather information before completing the email.

Email transfer enhancements and new forwarding option

Previously, you could only transfer an email interaction to a skillset. Now, you can also transfer the email to another agent. In addition, you can also forward an email to any email address.

Multiple keyword search

You can use multiple keywords when searching through email templates and suggested content.

Customer history view

Customer history information for all contact types (voice and multimedia) is now displayed together in the same table.

Other changes

This section outlines interoperability and other changes for Release 7.1.2.2. There are no other changes in earlier 7.1.x releases.

Other changes in Release 7.1.2 Service Pack 2

Interoperability with the latest WebLM releases

In Release 7.1.2.2, the latest versions of WebLM 8.1.3.x and 10.1.x are supported.

VMware support

Contact Center Release 7.1.2.2 supports ESXi 7.0 and 8.0 Update 2. Earlier VMware versions, including 6.5 and 6.7, are no longer supported.

See the VMware website for general lifecycle policy information.

End of support for Internet Explorer

Microsoft ended support for the Internet Explorer (IE) web browser in June 2022.

Many Contact Center applications, such as Contact Center Manager Administration (CCMA), Contact Center Multimedia (CCMM), and Communication Control Toolkit (CCT) require the IE engine. To run these applications, you must use Microsoft Edge in IE mode. If you are using Windows 10, IE can be disabled but cannot be removed from your computer. With Windows 11, you do not need to install the IE browser because Edge already includes the IE engine.

Windows operating system support

The following Microsoft operating systems are no longer supported:

- Windows 7 and 8.1
- Windows Server 2012 R2 and earlier versions

See the Microsoft website for lifecycle policy information.

Supported IP Office versions

In Release 7.1.2.2, Avaya Contact Center Select supports IP Office Release 10.1, 11.1.2, and 11.1.3.x.

Avaya Aura® Media Server interoperability

Contact Center now supports Avaya Aura® Media Server Release 10.1.x. Release 8.0.x is also supported.

Chapter 3: Avaya Agent Desktop overview

Agent Desktop is a single-interface client application used to interact with customers. You can respond to customer contacts through a variety of media, including phone, outbound contacts, email, web communication, fax, scanned documents, and Short Message Service (SMS) text messages. Agent Desktop provides automation for customer responses to eliminate repetitive actions, such as typing a common response in an email message. Agent Desktop supports specified IP Office phones and continues to support multimedia contact types.

> ✳ **Note:**
>
> Supervisors can use Agent Desktop regardless of what client application their agents are using. For example, a supervisor using Agent Desktop can observe or barge in to the call of an agent using Avaya Workspaces. Agents on Agent Desktop can interact with agents on Avaya Workspaces using features supported on both applications.

Agent Desktop, in an Avaya Contact Center Select solution, supports the following routed contact types:

- Voice contacts
- Email messages
- Web communication contacts
- SMS text messages
- Fax messages
- Scanned documents
- Voicemail messages

Your administrator determines which contact types you can handle. Avaya Contact Center Select also supports peer-to-peer instant messaging. To support email-based contact types, add an email server to your solution. To support the web communications contact type, add a web communications server to your solution.

Agent Desktop uses Microsoft .NET Framework ClickOnce Deployment technology, which means that you can install and start the application by entering a URL address in Windows Explorer or your web browser.

> ✳ **Note:**
>
> Agent Desktop does not support touch screen or tablet devices.

Prerequisites

- Review the Contact Center installation procedures.

- Ensure that you have the required administrative rights to install applications.

- Ensure that you are using one of the following supported operating systems:

  - Windows 10 (32–bit and 64–bit)

  - Windows 11 (64–bit)

- Ensure that the following are installed on the client machine. You can download them from the Avaya Contact Center Select server when you install Agent Desktop.

  - Microsoft .NET Framework 4.8.x

  - Microsoft Edge WebView2 Runtime v110 or later

- To install and start Agent Desktop, ensure that you have the Microsoft Edge browser.

  ➕ **Tip:**

  To access websites and Contact Center applications that require the IE engine, you must use Microsoft Edge in Internet Explorer mode.

- Disable the following settings, which Agent Desktop does not support, on the client machine:

  - Windows Power Saver mode.

  - Windows hibernate mode.

  Windows screen lock does not impact Agent Desktop functionality.

- Ensure that each client computer can resolve the hostname or computer name of the Avaya Contact Center Select server.

Chapter 4: Using your Agent Desktop

This chapter describes how to install, configure, and use Agent Desktop.

Enabling ClickOnce Support in Microsoft Edge

About this task

To install and start Avaya Agent Desktop using the Microsoft Edge browser, you must enable the ClickOnce Support feature in Microsoft Edge.

Procedure

1. Open Microsoft Edge.

2. In the address bar, type `edge://flags`.

3. Press **Enter**.

4. In the **Search flags** box, type `ClickOnce Support`.

5. Next to the ClickOnce Support feature description, from the list, select **Enabled**.

6. Close and reopen Microsoft Edge.

Result

You can now use Microsoft Edge to install and start Avaya Agent Desktop.

Installing Agent Desktop

Before you begin

- Ensure that you have a valid user ID and password to use with Agent Desktop.

- If you use Microsoft Edge, enable ClickOnce Support using the following procedure: Enabling ClickOnce Support in Microsoft Edge on page 21.

About this task

Install Agent Desktop, if you are starting the application for the first time, or if you are starting the application following installation of an upgrade or a patch.

Procedure

1. On the agent client computer, in the browser address bar, type the HTTP address (URL) provided by your system administrator.

   The URL format is `<Avaya Contact Center Select servername>/agentdesktop`.

2. Click **Install Prerequisites** and follow the on screen instructions to install the .NET and operating system components required to run Agent Desktop software.

   ✴ Note:

   You must have administrative privileges to install the prerequisite software.

3. Click **Launch**.

Starting Agent Desktop

Before you begin

- If you use Microsoft Edge, enable ClickOnce Support using the following procedure: Enabling ClickOnce Support in Microsoft Edge on page 21.

About this task

Start Agent Desktop when you are ready to open the application.

Procedure

On the Agent Desktop client computer, start Agent Desktop by following one of these steps:

- In the browser address bar, type the HTTP address (URL) provided by your system administrator. The URL format is `<Avaya Contact Center Select servername>/agentdesktop`. Click **Launch**.
- Click **Start** > **Programs** > **Avaya** > **Avaya Agent Desktop**.

The Agent Desktop toolbar appears.

Creating a shortcut to Agent Desktop

About this task

Create a shortcut to Agent Desktop to quickly access the application without manually entering the URL.

Procedure

1. Click **Start** > **Programs** > **Avaya**.

2. Right-click **Avaya Agent Desktop**.

3. Select **Send To** > **Desktop (create shortcut)**.

Logging on to Agent Desktop

About this task

Log on to Agent Desktop after you start the Agent Desktop application. The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Note:

You must be logged on to the desktop phone before you log on to Agent Desktop.

Procedure

1. Start Agent Desktop.

2. On the **User Credentials** window, in the **User ID** box, type the agent user ID. For example, type 6002.

3. In the **Password** box, type the password for the agent.

4. In the **Domain** box, type the host name of the Avaya Contact Center Select server or the Windows domain name.

5. Click **OK**.

6. On the Agent Desktop Top bar, from the Status list, select **Login**.

7. Click the **Telephony** tab.

8. Select **Desk Phone** from the **Place and receive calls using** drop-down list.

9. Click **Login**.

    Agent Desktop displays the date and time of your last login.

    The status icon changes to Not Ready.

Logging on to Agent Desktop for Microsoft instant messaging presence

About this task

Log on to Agent Desktop after you start the Agent Desktop application, using the presence option to enable Microsoft peer-to-peer instant messaging. When you log on, the system automatically

configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure

1. Start Agent Desktop.

2. On the Agent Desktop Top bar, from the **Status** list, select **Logged Out**.

3. In the Enter Login details window, select the **Presence** tab.

4. Select **Enable Presence Login**, and perform one of the following tasks:

   • If your user profile is configured in Microsoft Lync or Microsoft Skype for Business, ensure that the information in the **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP** fields is correct. You must also ensure that the client is joined to the appropriate domain before you use Agent Desktop.

   • If your user profile is saved locally on the PC running Agent Desktop, click **Load profile**.

   • If you create a new user profile, enter your **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP**, and then click **Save Profile**.

5. Click **OK**.

6. If a Microsoft Lync or Microsoft Skype for Business client is running on the Agent Desktop PC, a warning message appears. Click **Yes** to close the Microsoft instant messaging client.

Agent Desktop User Interface

Use Agent Desktop to handle voice, email, Web communications, SMS text message, voice mail, fax, and scanned documents contacts. Use Agent Desktop in the following situations:

   • to handle voice contacts in a voice-only contact solution

   • to handle voice contacts, email messages, or Web communications contacts in a voice and multimedia contact solution

This section describes the main user interface of the Agent Desktop application. There are three main sections to the Agent Desktop user interface:
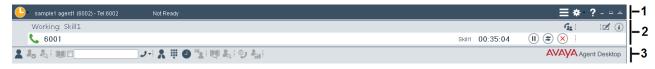
Figure 1: Example of Agent Desktop layout

1	Top bar on page 25
2	Work list window on page 25
3	Action bar on page 27

Agent Desktop also provides other controls and menus that are explained in the following sections.

Work Item paradigm

The main Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list.

The work list consists of work items and control buttons corresponding to the work item. The controls and functions change depending on the work list window status and available work flow options. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

Top bar

The Top bar appears at the top of the Agent Desktop window. The Top bar provides the system status and main controls to operate Agent Desktop.

Figure 2: Example of Top bar layout

The agent status icon appears on the top left corner of the Agent Desktop Top bar. The Top bar also displays the agent status, agent name, agent login ID, and dialable number of the agent.

The Top bar has the following icons:

Table 1: Top bar icons

Icon	Name	Description
	Agent status	Select agent status.
	Terminal Actions	Access Emergency controls.
	User preferences	Access user preferences, open the Dashboard, and change work item display settings.
	Help	Access help information.

Use the Terminal Action menu to perform the following tasks:

Table 2: Terminal Action Menu

Command	Description
Emergency	Immediately connect with your supervisor in case of emergency.

Work list window

The work list window contains work items and control buttons corresponding to the work item. The controls and functions change depending on the information in the work list window. The top-right

corner of the work list window has work item controls. These controls are common to all work items on the work list. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

The following figure shows the work list windows and controls.

Figure 3: Example of work list layout

The illustrated work list shows two work items:

1	An email work item, at the top of the work list.
2	A voice call work item, at the bottom of the work list.

- A work item is a collection of interactions with a customer, another agent, a supervisor, or an expert.
- A work list is a collection of work items. When you receive a new contact, it is added to the work list so that you can monitor your current contacts. When you finish with the contact, or reject the contact, the work item is removed from the list.

Work item controls:

Each work item has a number of contact-related controls. These controls change depending on the work list window status and contact type.

Table 3: Examples of work item controls

Voice	Email	Name	Description
		Accept	Accept the work item.
		Release	Release or reject the work item.
		Hold	Place the work item on hold.
		Transfer	Transfer the work item contact.
	-	Conference/Join	Conference the work item. Or join two work items.
		Activity code	Set the work item activity code.
		Work item details	Read work items details.
	-	Observed	A supervisor/agent is monitoring this contact. The administrator can configure whether or not this icon appears.

Comments on this document?

Only appropriate controls are displayed on work items. Voice-related controls are displayed on voice work items. Email-related controls are displayed on email work items.

Action bar

The Action bar contains global controls to create a new work item, to search contacts, and to open secondary windows. The Action bar is located at the bottom of the Agent Desktop window.

Figure 4: Example of Action bar layout

Use the Action bar at the bottom of the main interface to make new contacts. New voice or email contacts are collectively called new work in the Work Item Paradigm.

Table 4: Action bar commands

Icon	Name	Description
	Customer Details	View customer details.
	Contacts Presence	Contact presence.
	Observe	Listen in or participate in agent-customer calls or chat sessions. (Used by agent-supervisors only)
	Phonebook	Contact agents through the LDAP agent contact directory.
	Use Trunk Access Code	Number to access a trunk, generally 9.
	Originate Call	Start a new work item.
	Supervisor	Call your supervisor.
	DTMF	Generate Dual-tone Multi-frequency (DTMF) tones.
	Call Log	Display the Call Log to view missed calls.
	Contact Search	Search for contacts. Contact Search is not available for voice-only agents.
	Customer Search	Search for customers. Customer Search is not available for voice-only agents.
	Schedule Callback	Schedule a callback.
	Agent Statistics	Display the agent statistics scroll bar.

Table continues…

Icon	Name	Description
	Teleworker Status	Display the status of the Teleworker or nail-up call. You can click the status icon to establish or recover the nail-up call. ✱ **Note:** This icon appears at the bottom of Agent Desktop.

Contact type icons

The following table describes the icons that appear on the contact tab when a contact presents.

Table 5: Contact type icons

Icon	Name	Description
	Voice	Voice contact
	Email	Email contact
	IM	Instant Message contact
	SMS	SMS contact
	Web communications	Web communications contact
	Outbound	Outbound contact
	Video	Video contact
	Fax	Fax contact
	Voice mail	Voice mail message
	Open Queue	Open Queue contact
	Scan	Scanned document contact
	Callback	Callback contact
	Social Networking	Social Networking contact

The following table describes the alerting icons that replace the contact type icon when Agent Desktop presents additional information to the agent. These icons flash momentarily when presented, for example when a new Web communications message arrives.

Table 6: Alerting icons

Icon	Name	Description
	New text	New Web communications chat has arrived.
	Yellow warning	Web communications customer inactive/no response received.
	Red warning	Web communications customer idle.
	Egg timer	Instant Message customer idle/sent message unread.
	Red disconnected	Instant Message/Web communications customer disconnected.
	Web connect	Web communications customer connected.
	Numbered yellow warning	Instant Message: 1 or more new messages unread by agent
	Numbered red warning	Instant Message: 1 or more old messages unread by agent

User preferences

Use the User Settings page in the **User Preferences** menu to select template locations, enable the spelling checker, define an email signature, or change your password.

Use **Set Work Item Display** in the **User Preferences** menu to set the size of the Work list window. The Work list window displays active work items. You can set the number of active work items that you want to view in the Work list window. For more information, see Setting the Work Item Display on page 32.

Use the **Signature** button located in the EMail Signature section in the **Preferences** tab to create a signature that you can add at the bottom of an outgoing message. You can also add company images and logos to signatures and automatic signatures. For more information, see Adding company images and logos to signatures on page 97.

Screen pops on Agent Desktop

A screen pop is a third-party application that administrators configure using the Multimedia Administration tool. Agent Desktop displays screen pops when a contact alerts or is answered. Screen pops can display relevant information about the alerting or answered contact based on intrinsics, such as the To Address or Skillset associated with the contact.

The following types of screen pops are available:

- Basic Screen pops
- Advanced Screen pops

Administrators can configure a maximum of 20 basic screen pops and 50 advanced screen pops. However, a maximum of five screen pops can open for alerting contacts and up to a maximum of five screen pops can open for active contacts. Administrators must set a display order which is used to choose the five screen pops to launch per event.

As administrators can configure multiple screen pops to open on a work item and assign different settings to different screen pops, screen pop behavior varies between contact centers.

Screen pops open in one of the following three ways:

- Open as tabs within Agent Desktop.
- Open external to Agent Desktop within a web browser.
- Open an application external to Agent Desktop.

Customize Agent Desktop window settings

You can customize the following window settings on Agent Desktop:

- Window size and position.
- Window state (maximized or minimized).
- Splitter position. The splitter is an adjustable screen divider used to partition the user interface panels on Agent Desktop.
- Multimedia panel state (expanded or collapsed).
- Maximum number of work items you want the Work Items panel to display. If the number of Work Items is more than the maximum you have set, Agent Desktop displays the Work Items using a scroll bar. For more information, see Setting the Work Item Display on page 32.
- Panel swapping, that is, moving the **Left Pane** of Agent Desktop to the right side of Agent Desktop and vice versa. For more information about panel swapping, see Swapping Panels on Agent Desktop on page 33.

Once you close and reopen Agent Desktop, the system restores the window settings of Agent Desktop.

In a multiple screen setup, once you close and reopen Agent Desktop, Agent Desktop opens on the screen that Agent Desktop was last open on.

You can configure the Control Panel Display settings to change the size of text and other items on your screen. However, you must not change the default display settings, since Agent Desktop supports the **Smaller - 100% (default)** option only.

Agent Desktop system tray icon

You can add the **Agent Desktop** icon to the Windows system tray.

> ❗ **Important:**
>
> The system does not display the system tray icon by default. To add the system tray icon, you must expand the Windows System Tray, select **Customize** and then select **Show icon and notifications**.

The system tray icon has a context menu that you can use to change your state in Agent Desktop to Go Ready, Go Not Ready, After Call Work, or Logged Out. When Agent Desktop is minimized, the system tray icon provides information about the state of the agent. The icon displays the state

of the agent using the following icon colors: amber for Not Ready, green for Ready, blue for After Call Work, and white for Logged Out.

You can also close Agent Desktop, set After Work Codes or Not Ready Reason codes, and configure settings for Agent Desktop using the **Agent Desktop** system tray icon.

Shortcut keys in Agent Desktop

Shortcut keys are added to Agent Desktop to increase the accessibility compliance of Agent Desktop. Shortcut keys also decrease that time that agents take to perform common tasks.

You can use shortcut keys on Agent Desktop to perform actions such as, Go Ready, Go Not Ready, minimize or maximize Agent Desktop, release an active call, and answer an alerting call.

Agent Desktop displays the list of the shortcut keys in a tab on the **Preferences** control. For more information, see

Agent Statistics

Agent Desktop displays live skillset-related statistics. Agents can display assigned skillset statistics in a pie or a bar chart format. Supervisors can display statistics for all skillsets.

> ✳ **Note:**
>
> Ask your supervisor to ensure that Contact Center Web Statistics are enabled.

The main **Statistics** tab parts are:

- **Control**: Used to select chart types.
- **Skillsets**: Used to display and select skillsets.
- **Chart**: Used to display charts.

Control:

- Refresh: Reloads and resets the skillsets list in the skillset area.
- Sort: Alphabetical sort of skillset icons. Due to contact type prefixes on the skillsets names the skillsets are also sorted by contact type.
- Pie/Bar: Dynamically changes between pie and bar charts in the chart display area.
- Agents Available: Displays the number of agents available.
- Agents Not Ready: Displays the number of agents not ready.
- Max Wait Time: Displays the maximum time (in seconds) the customer has to wait before being connected to an agent.
- Calls Waiting: Displays the number of waiting calls.
- Alerts: Activate or de-activate Outlook style alerts for skillsets, whose Service Level falls below the threshold defined in Contact Center Manager Administration.

Skillsets:

Displays a skillset icon for each available or assigned skillset. Supervisors in a multimedia environment see all skillsets. Selecting a skillset icon updates the chart with the latest statistics for that skillset.

The percentage figures on the skillset icons represent the current Service Level for the skillset. The icons change to red if the current Service Level falls below the threshold defined in Contact Center Manager Administration.

Charts:

The chart area displays a pie or bar chart.

Agent Desktop Dashboard

The Agent Desktop Dashboard enables you to collect and upload log files or videos to the Contact Center server. You can also use the Dashboard to check the network connectivity of Agent Desktop with the Contact Center servers. This feature assists with troubleshooting if you experience a problem while using Agent Desktop. You normally use this feature only on request, and under the guidance of support staff.

Using the Agent Desktop configurable home page

About this task

Administrators can set up an Agent Desktop configurable home page to open a screen pop when you start Agent Desktop. The screen pop displays a Web page that the administrators configure. Agents can use this Web page to perform their work efficiently. For example, the Web page can open the latest sales or marketing campaign that the company is running at that time, or the Web page can include the default agent script that the agent uses while talking to a customer.

Procedure

1. Start Agent Desktop.

   Agent Desktop opens a screen pop containing a Web page that the administrators configure.

2. Right-click the screen pop tab to close the screen pop.

3. Click the **Home Page** button on the Agent Desktop toolbar to reopen the screen pop.

Setting the Work Item Display

About this task

The Work list window displays the active work items. Use **Set Work Item Display** to set the number of active work items that you want to view in the Work list window.

For example, if you set the work item display to the maximum of two and the number of active work items is three, then the Work list window displays two active work items. You can use scroll bars to the right of the Work list window to view the third active work item. The Work list window displays the order of the work items as hover text. The hover text for the first work item is 1/3, and so on.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. From the **User Preferences** menu, select **Set Work Item Display**.

3. From the **Set Work Item Display** menu, select the maximum number of active work items that you want the Work list window to display. You can choose from the following options:

   • **Size to show all**

   • **Show maximum of 1**

   • **Show maximum of 2**

   • **Show maximum of 3**

   • **Show maximum of 4**

   • **Show maximum of 5**

   By default, **Set Work Item Display** is set to **Size to show all**.

   The **Set Work Item Display** setting is saved in the agent profile after you log off from Agent Desktop. When you log back on to Agent Desktop the setting is reset to the saved value.

Swapping Panels on Agent Desktop

About this task

If your administrator allows, you can move the left pane of Agent Desktop to the right side and vice-versa.

A swap grip bar appears on the top of the left panel in Agent Desktop. You can drag and drop the swap grip bar onto the swap button to perform the panel swap.

The system saves the panel position information according to your Contact Center configuration.

Procedure

1. On the left pane of Agent Desktop, click the swap grip bar.

   When you hover over the swap grip bar, the system displays the following tooltip: `Drag and drop onto swap button to switch panels`.

2. To perform the panel swap, drag and drop the swap grip bar onto the swap button.

   The left pane moves to the right side of Agent Desktop.

Example
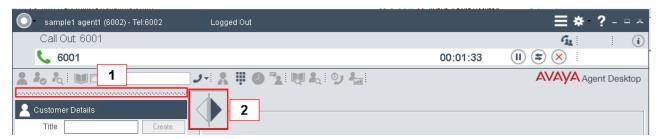
Figure 5: Example of Agent Desktop Swap Grip bar and Swap button

1	The **Swap Grip** bar.
2	The **Swap** button.

Viewing shortcut keys on Agent Desktop

Before you begin

Log on to Agent Desktop.

About this task

You can use shortcut keys on Agent Desktop to perform common tasks, such as Go Ready, Go Not Ready, minimize Agent Desktop, release an active call, and answer an alerting call.

Procedure

1. On Agent Desktop, click **User Preferences** > **Preferences**.

2. Click the **Shortcut Keys** tab.

   The system displays the list of shortcut keys.

3. To disable shortcut keys, clear the **Enable Shortcut Keys** check box.

   By default, the **Enable Shortcut Keys** check box is selected on Agent Desktop.

Changing your status to Ready

About this task

Change your status to Ready when you are available to create and receive contacts.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.

2. Select **Go Ready** to create or receive both Voice and Multimedia contacts.

The status icon changes to green.

Changing your status to Not Ready

About this task

Change your status to Not Ready when you are unavailable to receive contacts. If your administrator has configured Not Ready Reason codes, you can select a code when you change your status to Not Ready.

Your supervisor or administrator configures codes for Not Ready Reasons. Not Ready Reason codes can be alphanumeric. Agent Desktop displays the Not Ready Reason codes list.

By default, the **Select or type a N/R Reason Code** drop-down list displays Not Ready (N/R) Reason codes by both their text and numeric values. Therefore, you can easily find the Not Ready (N/R) Reason codes by typing either the text or numeric value of the N/R Reason code.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.

2. Click **Go Not Ready**.

   The **Status** icon changes to orange.

3. From the **Select or type a N/R Reason Code** drop-down list, select the Not Ready Reason code.

   Your status changes to Not Ready on the Top bar.

   ✱ **Note:**

   If administrators have configured a setting that forces you to enter a Not Ready reason code when you change your status to Not Ready in Agent Desktop, you must select a Not Ready Reason code. If administrators have not configured this setting, you can also go Not Ready without selecting a Not Ready Reason code. If you go Not Ready without selecting a Not Ready Reason code, depending on the configuration set by administrators, your status changes either to a Not Ready state or an ACW state.

Changing your status to Not Ready when on a contact

About this task

Change your status to Not Ready while active on a contact to indicate that you are not ready to accept contacts when the current contact is complete. If your administrator has configured Not Ready Reason codes, you can select a code when you change your status to Not Ready.

By default, the **Select or type a N/R Reason Code** drop-down list displays Not Ready (N/R) Reason codes by both their text and numeric values. Therefore, you can easily find the Not Ready (N/R) Reason codes by typing either the text or numeric value of the N/R Reason code.

Procedure

1. While active on a contact, on the Agent Desktop Top bar menu click the **Status** icon.

2. Click **Go Not Ready**.

   The **Status** icon changes to orange.

3. From the **Select or type a N/R Reason Code** drop-down list, select the Not Ready Reason code.

   Your status changes to Not Ready on the Top bar.

   ⊛ **Note:**

   If administrators have configured a setting that forces you to enter a Not Ready reason code when you change your status to Not Ready in Agent Desktop, you must select a Not Ready Reason code. If administrators have not configured this setting, you can also go Not Ready without selecting a Not Ready Reason code. If you go Not Ready without selecting a Not Ready Reason code, depending on the configuration set by administrators, your status changes either to a Not Ready state or an ACW state.

Accessing the Agent Statistics tab

Before you begin

• Ensure that your status is set to Logged on.

About this task

Access the **Agent Statistic** tab to define and view agent and skillset charts.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.

2. Select the **Statistics** tab, to display the **Agent Statistics** tab and controls.

Viewing the Skillset statistic chart

Before you begin

• Ensure the agent is a member of all necessary skillsets.

About this task

View the skillset statistics chart to monitor statistics for the current skillset.

Procedure

1. On the Agent Desktop **Statistics** tab, select **Contacts**.

2. In the **Skillset** control, select the skillset to see the statistics.

   A chart is displayed in the chart area showing the statistics.

3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

Viewing the Agent statistic chart

About this task

View the agent statistics chart to monitor statistics for agents in a skillset.

Procedure

1. On the Agent Desktop **Statistics** tab, select **Agents**.

2. In the **Skillset** control, select the skillset for which you want to see the agent-related statistics.

   A chart is displayed in the chart area showing the statistics.

3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

Enabling Service Level alerts

About this task

Activate Outlook style alerts for skillsets, whose Service Level falls below the threshold defined in Contact Center Manager Administration.

Procedure

On the Agent Desktop, **Statistics** tab, click the **Alerts** check box to enable Service Level alerts.

If the Service Level for a skillset falls below the threshold defined in Contact Center Manager Administration, an alert message box appears in the bottom right-hand side of the screen. Click this alert box to automatically open the **Statistics** tab on the Agent Desktop.

Using the Statistics Ticker

About this task

The Agent Desktop Action bar contains an **Agent Statistics Ticker**. The **Agent Statistics Ticker** displays assigned skillsets, contacts waiting (in square brackets), and skillset name on a scrolling display that loops every 10 seconds.

Procedure

1. On the Agent Desktop Action bar, click **Agent Statistics** to show or hide the **Agent Statistical Ticker**.

2. On the **Agent Statistical Ticker**, click the **>** icon to advance to the next skillset.

3. On the **Agent Statistical Ticker**, click on any item in the **Ticker** box to display the Agent Desktop **Statistics** page.

4. To show or hide the **Agent Statistical Ticker**, click the button that appears to the left of the **Agent Statistical Ticker**.

Collecting and uploading log files from the Agent Desktop Dashboard

About this task

The Agent Desktop Dashboard assists support staff by gathering all Agent Desktop logs and a screen capture of the Windows desktop. The Dashboard saves these logs in a .ZIP file which you can upload to the Contact Center server. Use this feature if a member of support staff requests the logs from your desktop PC.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. Click **Open Dashboard**.

3. If you want to collect log events for a specific time period, in the **Collect Logs From** section, select the check box for the appropriate time period .

   If you select **Specify Time**, complete the **Hour/Minute** fields.

4. On the **Dashboard** window, click **ZIP Log Files**.

   The **Dashboard** window relocates to bottom corner of the screen, so it does not interfere with the screen capture. The **ZIP Log Files** button changes to **Upload Log Files**. When Agent Desktop completes creating the .ZIP file, it displays the **Dashboard Message** screen, identifying the folder to which it saved the log files.

5. Click **Upload Log Files**.

   Agent Desktop uploads the .ZIP file directly to the server.

Variable definitions

Name	Description
Most Recent Startup	Select this check box to extract and upload only log events generated since the most recent launch of Agent Desktop.
Last Hour	Select this check box to extract and upload only log events generated in the last hour.
Specify Time	Select this check box to specify a time and date from which you want to extract and upload log events. If you select this option, complete the **Hour/Minute** field and, optionally, specify a date.

Checking the network connection in the Agent Desktop Dashboard

About this task

The Dashboard shows the status of the connection between Agent Desktop and the Contact Center servers. You can use this when troubleshooting, to determine whether you have an issue with your network connection.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. Click **Open Dashboard**.

3. Select **Primary Servers**.

4. On the **Primary Servers** tab, review the status of the listed servers.

   The Dashboard shows the different servers configured in the contact center, the IP address or server name of each, and the status of each network connection with Agent Desktop.

Recording a video of your agent desktop actions

About this task

You can record a sequence of screen captures from Agent Desktop to assist with troubleshooting Agent Desktop problems. When you start the Capture Video function, the Dashboard starts recording one screen capture per second. When you finish recording, the Dashboard saves these screen captures in a .ZIP file which you can upload to the Contact Center server.

Use this feature if a member of support staff wants to know the actions you took that resulted in an issue you encountered.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. Click **Open Dashboard**.

3. On the Dashboard, click **Capture Video**.

   The **Dashboard** window relocates to bottom corner of the screen, so it does not interfere with the video capture. The button label changes to **Finish Recording**, and the button changes color to red.

4. Complete the actions required to reproduce the error.

5. Click **Finish Recording**.

   Agent Desktop displays the **Dashboard Message** screen, identifying the folder to which it saved the log files.

6. Click **Upload Video** to upload the video .ZIP file to the server.

Changing the Agent Desktop Dashboard log settings

Before you begin

Log on to Agent Desktop.

About this task

Follow this procedure to change the Agent Desktop logging settings. Change these settings only under the guidance of the system administrator or support staff.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. Click **Open Dashboard**.

3. Select **Logging**.

4. On the **Logging** tab, check additional logging options that you want to enable.

   🛈 **Important:**

   The settings on this tab can lead to additional disk space usage and processor overhead on your desktop computer. Change these settings only with the guidance of the administrator or of support staff.

Accessing online help

About this task

Access online help when you need immediate help to perform tasks. Agent Desktop includes online help for both agents and supervisors.

Procedure

On the Agent Desktop Top bar menu, click **Help** > **Show Help**.

Or

Press the F1 key to display the online help.

Closing contacts if you receive a force log out message

Supervisors can use the Force Agent Log out feature to remotely log out an agent who forgets to log out at the end of their shift.

Normally a supervisor does not force log out an agent who is active on Agent Desktop. However, it is possible that a supervisor can make an error and force log out an active agent.

If this happens, Agent Desktop displays a **State Change Alert** dialog identifying the supervisor who performed the force log out. Agent Desktop closes 60 seconds after it displays this message.

Clear the message and close any open contacts you have as quickly as possible. Before logging in again, contact your supervisor.

If you were away from your desk, and a supervisor used the Force Agent Log out feature to log you out of Agent Desktop, Agent Desktop displays a message the first time you log on again, to inform you that this happened.

Understanding supervisor changes to your Ready status

Your supervisor can change your agent status, to toggle it between Ready and Not Ready. When they change an agent status to Not Ready, a supervisor has the option to enter a Not Ready Reason code for the agent. The following scenarios describe situations in which a supervisor changes an agent's status:

- A trainee agent goes Not Ready, entering a reason code of At_Lunch. They return from lunch but forget to reset their status to Ready. Their supervisor can see that they are at their desk, and also that they show Not Ready on the Real-Time Display (RTD). The supervisor uses the Change State button to make the agent ready.

- A trainee agent leaves their desk for lunch, but forgets to set their status to Not Ready. Contacts continue to alert on their Agent Desktop. The supervisor notices that the agent is

not at their desk, and that they show Ready on the RTD. The supervisor uses the Change State button to make the agent not ready.

When a supervisor changes your status, Agent Desktop displays a notification informing you of the status change and the supervisor who made it.

Logging off from Agent Desktop

Before you begin

- Ensure that you do not have a contact open. If a contact is open, you must close the contact before you log off of the application.

About this task

Log off from Agent Desktop when you are ready to exit the application.

A warning message appears asking you to confirm that you want to close the Agent Desktop and log off.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.

2. Click **Log Out**.

   Agent Desktop logs you off. The status icon changes to red and the Top bar displays the Logged Out status.

Removing the Agent Desktop client software

About this task

Remove Agent Desktop client software from a client computer. Use Windows Control Panel to uninstall the application.

Procedure

1. Log on to the Agent Desktop client computer.

2. On the Agent Desktop client computer, navigate to **Start** > **Control Panel**.

3. From Programs and Features, click **Uninstall a program**.

4. From the **Name** list, select **Avaya Agent Desktop** and click **Uninstall/Change**.

5. When prompted, select **Remove the application from this computer** and then click **OK**.

Chapter 5: Telephony

This chapter describes how to use Agent Desktop to handle incoming telephone calls from customers.

You can use Agent Desktop to perform the following telephony tasks:

- Accept and decline incoming contacts
- Enter an Activity code
- Enter an After Work Call Item code
- Place and release a call on hold
- Transfer a call to another party
- Conference a call
- Join two calls (if available)
- End a call
- Call a supervisor
- Make a call
- Enter DTMF Digits
- Handle an emergency
- Observe, barge-in, and whisper coach on a voice contact (agent-supervisors only)
- Call an agent using Contacts Presence
- Call an agent using the Phonebook

Although you can use your phone to perform certain tasks, Avaya recommends that you use Agent Desktop to perform all telephony tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

The Customer Details window shows a history of all past voice calls for a contact. The **History** tab lists the voice calls in reverse chronological order, that is the most recent calls appear higher in the call list.

Desktop phone behavior

Agents using Agent Desktop to handle voice contacts can also have a desktop phone at their workstation. The desktop phone displays information when a call presents to the agent. Typically, this information includes:

- The original caller number as the calling party.
- The name of the skillset that queued the call.

Accepting a call

Before you begin

- Ensure that you have set your status to **Go Ready**.
- Ensure that you are assigned to a skillset for handling voice calls.

About this task

Accept and work with telephone calls. The relevant work item controls become active and the call timer appears on the work item.

If your administrator has configured your Contact Center to run in the Call Force Delay mode, you must handle all contacts presented to you.

Procedure

On the Agent Desktop, select the new alerting work item and click the **Accept** work item control.

The left pane of Agent Desktop shows the customer details and history of all past calls with the contact.

Declining a call

Before you begin

- Ensure that you are assigned to a skillset for handling voice calls.

About this task

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

Procedure

On the Agent Desktop, select the new work item and click **Reject**.

Entering an Activity code

About this task

You can enter one or more Activity codes during calls by using the Agent Desktop Top bar activity inline command. Activity codes provide a method to track the time that agents spend on various types of calls. For example, you can enter a Sales activity code in Agent Desktop during a sales-related call.

Your supervisor or system administrator configures Activity codes. Administrators define Activity codes in Contact Center Manager Server. Activity codes can be alphanumeric. Agent Desktop displays the Activity codes list.

Agent Desktop displays the **Activity Code** box on the work item based on your Contact Center configuration. Administrators can configure activity codes that correspond to a contact type and a skillset. Therefore, Activity codes are filtered on a contact type and skillset basis. For example, if you are handling email contacts, Agent Desktop populates the **Activity Code** list both with activity codes that correspond to the email contact type and with activity codes that map to the skillset.

Procedure

1. Select the work item.

2. Click the **Activity Code** work item inline command.

3. From the **Select or type an Activity Code** drop-down list, select or type the activity code.

Entering an After Call Work Item Code

About this task

You must enter After Call Work Item (ACW) codes when you perform post call processing work, such as adding contact information to a Customer Relationship Management (CRM) system. You do not receive any contacts after you select **Set ACW Code**.

Supervisors or administrators configure ACW codes. If the administrator has configured ACW codes, you must select a code after you select **Set ACW Code**.

You can enter ACW codes for post call processing work related to the contact that you have just released. In a multiplicity environment, the ACW code applies to the last contact that you release. Depending on the settings configured by the administrator, the system can place you automatically into the ACW state, using the default ACW code 00000 immediately upon completion of the contact.

You can enter ACW codes either while working on a contact, which prevents Agent Desktop from presenting any new contacts to you, or after releasing the contact and before Agent Desktop presents a new contact to you, or you go into the Not Ready state.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.

2. To perform post call processing work and not receive any contacts, click **Set ACW Code**.

3. From the **Select or type an ACW Code** drop-down list, select or type the After Call Work Item code.

Placing a call on hold

About this task

Place a call on hold to interrupt your current call. When you want to speak to the caller again, release the call from hold.

The call timer on the work item changes to orange characters while the work item is on hold.

Procedure

1. Select the work item.

2. Click **Hold**.

Releasing a call on hold

About this task

Take a call off hold when you want to speak to the caller again.

Procedure

1. Select the work item.

2. Click **Unhold**.

   The call is released from hold and the status bar color changes to green.

Transferring a call

About this task

You can transfer a call to another agent using a supervised transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before you complete the transfer. You can also transfer the call without speaking to the third party.

✴ Note:

If you are transferring a call to a voicemail system, you must ensure that the correct DTMF tones are transferred to the voicemail system.

Procedure

1. On the work item, click **Transfer**.

2. In the Transfer window, ensure that **Supervised Transfer** is selected.

3. Select **Enter Value** and type the number to which you want to transfer the call.

   Or

   Select **Phonebook** to open Phonebook and transfer the call using the click-to-transfer feature of Phonebook.

   The active call is placed on hold and the call is placed to the third party. While you speak with the third party, both the **Transfer** and **Hold** buttons on the phone flash to indicate that you have a customer on hold and that you must complete the transfer.

4. Speak to the third party if necessary or before the third party answers the call, click **Complete Transfer**.

   The call is transferred to the third party and is dropped from your phone and the Agent Desktop work list.

Conferencing in another agent

About this task

You can add another agent to your call. When you add someone to your call, it becomes a conference call.

Procedure

1. On the work item, click **Conference** to place the customer on hold and open the Conference window.

2. In the Conference window, select **Enter Value** and type the number of the agent to conference into the call.

   Or

   Select **Phonebook** to open Phonebook and conference in another agent using the click-to-conference feature of Phonebook.

3. Click **Conference Contact** to begin the conference.

4. Speak with the agent, if necessary, before you conference in the customer.

5. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.

Conferencing in a supervisor

About this task

You can conference your supervisor, if you want the supervisor to join your current call.

Procedure

1. On the Agent Desktop Action bar menu, click **Supervisor** to place the customer on hold and conference in your supervisor.

2. Speak to your supervisor, if necessary, before you conference in the customer.

3. Click **Conference** again to take the customer off hold and conference in the customer and your supervisor.

Ending a call

About this task

End a call when a call is completed. If your status was Ready before the call, your status is automatically set to Ready, when you terminate the call. If you require time to perform call wrap-up tasks, before you accept another call, select **Set ACW Code** and enter the After Call Work Item (ACW) code in the **Code** field of the Top bar. If you require to change your status to Not Ready and enter a Not Ready Reason Code in the **Code** field of the Top bar. The administrator defines Not Ready Reason and ACW codes.

Procedure

On the work item, click **Release**.

Calling your supervisor

About this task

You can call your supervisor, if you are currently not handling a call.

Procedure

On the Agent Desktop Action bar menu, click **Supervisor**.

Making a call

About this task

Make a call using Agent Desktop. Ensure that you follow the steps based on the type of phone number you want to call:

- the default phone number
- a new external phone number
- a new internal phone number

Procedure

1. On the Agent Desktop Action bar menu, from the drop-down list click **Initiate Call**.

2. In the **Originate Call** text box, enter the phone number to dial.

3. Click the **Originate Call** icon.

   The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.

4. Click **Release** when you complete the call.

Using DTMF digits

About this task

Use the DTMF feature if you need to navigate through a Contact Center menu or dial numbers to access voice messages during a call.

Procedure

1. On the Agent Desktop Action bar menu, click **DTMF**.

2. Enter the numbers on the keypad that appears.

Using the Emergency key

About this task

Use the Emergency key if you require immediate assistance from your supervisor while handling a call. For example, if a customer suddenly threatens you while you are on a call, you can add your supervisor to the call immediately. The caller is not placed on hold during an emergency conference.

Procedure

On the Agent Desktop Top bar menu, click **Emergency**.

Your supervisor is immediately added to the call and joins the conference with you and the customer.

Observing a voice contact

Before you begin

- Ensure that you log on to Agent Desktop.
- Ensure that you have agent-supervisor privileges.

About this task

You must be an agent-supervisor to use the Observe function to listen in on a voice contact. Only one agent-supervisor at a time can observe a voice contact, and the agent-supervisor can observe only one voice contact at a time.

Using the Observe function, you can listen in on a voice contact without being heard. Using the Barge-in function, you can participate in a voice contact between the agent and the customer. Using the Whisper Coaching function, you can provide advice to an agent on a skillset call without being heard by the customer.

Your actions do not affect the original voice contact or the normal connect and disconnect actions of the agent and customer conversation.

By default, the agent or the customer on the voice contact hears a tone when you join or leave the voice contact. They also hear the tone repeatedly at regular intervals. The contact center administrator can customize these settings.

> ✱ **Note:**
>
> An agent-supervisor can observe only incoming Contact Center voice contacts. An agent-supervisor cannot Observe or Barge-in on Outbound contacts or any other voice contacts.

Procedure

1. On the Agent Desktop Top bar menu, click **Observe**.

   The Agent Desktop displays the Supervisor Observe window.

2. Under **Filter**, select the **Item** as **Contact Type** with the **Value** as **Voice**.

3. Select a voice contact and click **Observe**.

   Agent Desktop presents a new voice contact to you. You do not need to be Ready to receive this contact. The contact connects you to the selected agent's voice contact.

4. Click **Release** to end the voice contact observation session.

   The observation session ends when either the agent, the customer, or the supervisor releases the voice contact.

Barging-in on a voice contact

Before you begin

- Ensure that you log on to Agent Desktop.
- Ensure that you have agent-supervisor privileges.
- Ensure that you are observing a voice contact between an agent and a customer.

About this task

You can barge-in on a voice contact, if you are observing a voice contact that needs immediate supervisor attention. Using the Barge-in function, you can participate in a voice contact between the agent and the customer.

Your actions do not affect the original voice contact or the normal connect and disconnect actions of the agent and customer conversation.

By default, the agent or the customer on the voice contact hears a tone before you barge-in on a voice contact.

> **Note:**
>
> An agent-supervisor can observe only incoming Contact Center voice contacts. Agent-supervisors cannot Observe or Barge in on Outbound contacts or any other voice contacts.

Procedure

1. In the Supervisor Observe window, click **Barge-in**, to barge-in on a voice contact you are observing.

2. Click **Release** when your conversation is complete.

   The voice contact continues until either the agent or the customer releases the contact.

Whisper Coaching an agent on a voice contact

Before you begin

- Log on to Agent Desktop.
- Get supervisor/agent privileges.
- Observe a voice contact of an agent.

> **Note:**
>
> Coaching on a voice contact is possible only on skillset calls in a SIP-enabled Contact Center.

About this task

You can observe and coach on Contact Center voice contacts. The call you want to observe must be under CTI control, that is, the agent is using Agent Desktop or a custom CTI application for handling the call. You cannot observe and coach on calls if you log on only to your desktop telephone.

You can coach an agent on a voice call if you are observing a voice call that can be used to train an agent and improve the performance of an agent. Using the Whisper Coaching function, you can hear everything that is said on the call. However, the advice that you provide is audible only to the agent.

When you join or leave the voice contact by default, the agent hears a tone. Agents also hear a tone repeatedly at regular intervals. The Contact Center administrator can customize these settings. Agents see an icon on Agent Desktop during Whisper Coaching.

Your actions do not affect the original voice call or the normal connect and disconnect actions of the agent and customer conversation.

Procedure

1. In the Supervisor Observe window, click **Whisper**.

2. Provide advice to the agent.

3. Click **Release** when done.

   You can also go back to observing the voice contact, or you can also barge in on the voice contact.

   The voice contact continues until the agent or the customer releases the call.

Joining two voice calls

About this task

If available, you can use call join to conference together two previously unrelated calls. Call join is supported only when the unrelated calls to be joined are already present on Agent Desktop.

If you have a main call, a consult call, and an unrelated call, on the unrelated outgoing call, you can join to either the main call or the consult call.

Procedure

1. Answer the first inbound voice call (from caller A).

2. Answer the second inbound voice call (from caller B).

3. On the active call (from caller B), click the Conference/Join button, and select the held or active call from the list.

   This action joins the first call and second call. Caller A and Caller B can now speak with each other.

Making a call while on an existing voice call

About this task

Make a new voice call while you already have an existing voice call on Agent Desktop. The existing call (work item) is automatically put on hold. You can work on one voice call at a time; the other calls are placed on hold.

Procedure

1. On the Agent Desktop Action bar menu, click **Originate Call**.

2. In the **Originate Call** text box, enter the phone number to dial.

3. Click **Originate Call** again. The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.

   After the second call or optionally a third call is originated, each call appears on Agent Desktop individually. Agent Desktop automatically puts the existing call on hold.

Accepting an inbound voice call while on an existing skillset voice call

About this task

Accept and work with a second telephone call. The relevant work item controls become active and the call timer appears on the work item.

Procedure

On the Agent Desktop, select the new alerting work item and click the **Accept** work item control.

The existing call (work item) is automatically put on hold. You can work on one voice call at a time; the other calls are placed on hold.

Calling an agent using Contacts Presence

About this task

Call an agent's default phone number after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.

2. To call an agent from your list, click the **My Contacts** tab.

   Or

To call an agent from an Instant Experts group, click the **CC Contacts** tab.

3. Select the name of the person you want to call, after confirming that they are available.

4. Click the **Click-to-call** icon or right-click the name of the person and click **Call**, and then click the default phone number.

   The default phone number is dialed.

5. Click **Release** when you complete the call.

Searching for a contact in Phonebook

About this task

You can use Phonebook to search the LDAP directory for a contact.

Procedure

1. On the Agent Desktop, click **Phonebook**.

   The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Select the column name by which you want to search for a contact.

   For example, if you want to search by **First Name**, select **First Name** from the drop-down list.

   The system displays all the visible columns of the Phonebook in the drop-down list.

3. In the search text input box, type the search text that corresponds to the field selected in the drop-down list.

   For example, if you select **First Name**, type `John` in the search input text box. The system displays all the entries with the value John in the **First Name** column.

Calling an agent using Phonebook

About this task

You can use Phonebook to contact agents through the LDAP agent contact directory.

Procedure

1. On the Agent Desktop, click **Phonebook**.

   The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Search for a contact.

For more information about searching for a contact, see <u>Searching for a contact in Phonebook</u> on page 54.

3. Select a name, and click the **Click to call** icon under the Phone column.

   The system dials the phone number stored in LDAP.

4. Click **Release** when you complete the call.

Filtering contacts using Phonebook

About this task

You can use Phonebook to filter contacts in the LDAP directory.

The LDAP directory contains a lot of contacts. You can filter contacts based on the following three types of users:

- Favorites
- Speed Dials
- Custom Contacts

You can tag a contact as favorite or add a contact to the speed dial list. For more information, see <u>Tagging a contact in Phonebook</u> on page 56.

Custom contacts are contacts that you add to Phonebook. For more information, see <u>Adding a custom contact</u> on page 57.

Procedure

1. On the Agent Desktop, click **Phonebook**.

   The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. From the **Filter** drop-down list, select the type of contact based on which you want to filter the contacts.

   You can choose from the following types:

   - **Favorite**
   - **Speed Dial**
   - **Custom Contacts**

   The system displays the list of contacts based on the type of contact you choose.

3. Click **Reset** to clear the filter and return to the unfiltered Phonebook list of contacts.

Tagging a contact in Phonebook

About this task

You can tag a contact in Phonebook as **Favorite** or **Speed Dial**. Use tagged contacts to filter and search for contacts effectively. Administrators set the maximum number of contacts that you can add as favorites or add to the speed dial list.

Procedure

1. On the Agent Desktop Top bar menu, click the **Phonebook** icon.

   The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. In the Phonebook grid, select the row for the contact that you want to tag and right-click the row.

3. Select **Favorite** or **Speed Dial**.

   If you select **Favorite**, the system adds a star icon to the contact. The system displays the star icon in the **Tagged** column.

   If you select **Speed Dial**, the system adds a dial pad icon to the contact. The system displays the dial pad icon in the **Tagged** column.

   If you select **Favorite** and **Speed Dial**, the system adds the star and the dial pad icons to the contact. The system displays the star and the dial pad icons in the **Tagged** column.

Configuring the display of columns in Phonebook

About this task

You can configure the display of your Phonebook by selecting the columns that you want to display in the Phonebook grid. You can order and sort the columns. You can also decide how many records you want to view per page in the phonebook.

Procedure

1. On the Agent Desktop, click **Phonebook**.

   The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. To select the columns that you want to display in Phonebook, right-click the column headings row and select **Configure Columns** in the Phonebook grid.

   The system displays the Column Configuration window.

3. To add a column to the list that is displayed in the Phonebook grid, select the column title from the **Available** list.

4. Click **Add >**.

The column title moves to the **Displayed** list.

5. To remove a column from the list that is displayed in the Phonebook grid, select the column title from the **Displayed** list.

6. Click **< Remove**.

The column title moves to the **Available** list.

7. To arrange the columns in the Phonebook grid, select the column title under the **Displayed** list and click **Move Up** or **Move Down** in the Column Configuration window.

You can also arrange the columns in the Phonebook by dragging the column in the Phonebook grid.

8. Click **Save**.

The system saves the settings and displays the Phonebook grid based on your settings.

9. To sort the columns in the Phonebook grid, click the column heading.

For example, if you click the **Display Name** column header, the system sorts the contacts alphabetically according to the display name.

10. To change the number of records that are displayed per page in Phonebook select the number of records from the **Records per page** drop-down list.

By default, the system displays 20 records per page.

11. To navigate through the pages of Phonebook, click the arrows on the bottom-right of the Phonebook grid to move to the Next, Previous, First, and Last page.

Adding a custom contact

Before you begin

You can create custom contacts only if administrators have enabled creating custom contacts.

About this task

Custom contacts are contacts that you require, which are not present in the LDAP directory. The number of contacts that you can add to Phonebook depends on the number that administrators allow.

Procedure

1. On the Agent Desktop Top bar menu, click the **Phonebook** icon.

The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Right-click on any cell in the Phonebook grid.

3. Select **New Contact**.

The system displays the New Contact dialog box.

4. Fill in the details for the new contact.

   The **Display Name** field is mandatory. You can also set the new contact as favorite or add the new contact to your speed dial list by selecting the **Favorite** or **Speed Dial** check box.

5. Click **Save**.

   The system adds the new contact in the Phonebook grid.

Editing a custom contact

About this task

You can edit the details of only the contacts that you have added to Phonebook.

> **Note:**
>
> You cannot edit an LDAP contact.

Procedure

1. On the Agent Desktop Top bar menu, click the **Phonebook** icon.

   The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Right-click on any cell in the Phonebook grid.

3. Select **Edit Contact**.

   The system displays the Edit Contact dialog box.

4. Update the details that you need to change for the custom contact.

5. Click **Save**.

Deleting a custom contact

About this task

You can delete only the contacts that you add to Phonebook.

> **Note:**
>
> You cannot delete an LDAP contact.

Procedure

1. On the Agent Desktop Top bar menu, click the **Phonebook** icon.

The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Right-click on any cell in the Phonebook grid.

3. Select **Delete Contact**.

   The system displays a Delete dialog box.

4. Click **Yes** to confirm the deletion of the contact.

   > ⊛ **Note:**
   >
   > You can also delete a custom contact by selecting the row and pressing `Delete` on the keyboard.

Using the Call History tab

Before you begin

- You can view and delete the call history only if administrators allow you to.

About this task

You can view the call history for the calls that you have made, received and missed in the **Call History** tab of Phonebook. The number of calls that you can view in the **Call History** tab depends on the number set by administrators.

The **Call History** tab lists the name, number, date, time and duration of the call. By default, the **Call History** tab displays the calls in the descending order based on time. Therefore, the **Call History** tab displays the last call first.

The **Call History** tab also displays the type of call. Outbound calls, inbound calls, and missed calls are the three types of calls. The **Call History** tab displays the type of call using icons in the first column of the Phonebook data grid.

If agents miss calls, the **Call Log** icon on the Agent Desktop Action bar displays a red-circular icon with the number of calls that the agent has missed. The number increases for every missed call. Agents can log out of Agent Desktop or click the **Call Log** icon and open the **Call History** tab to clear the missed-call indicator.

Procedure

1. On the Agent Desktop Action bar menu, click the **Call Log** icon.

   Or

   On the Agent Desktop Action bar menu, click the **Phonebook** icon and then click the **Call History** tab.

2. To filter calls based on the type, select the call type from the drop-down list present at the top of the Call History grid.

Select one of the following:

- **Inbound**
- **Missed**
- **Outbound**

3. To sort the columns in the Phonebook grid, click the column heading.

   For example, if you click the **Name** column header, the system sorts the contacts alphabetically according to the name of the contact.

4. To create a custom contact, click the **Add a Custom Contact (+)** icon.

   The system displays the New Contact dialog box with the **Display Name** and the **Phone** fields prepopulated.

   For more information, see Adding a custom contact on page 57.

5. To make a call directly from the **Call History** tab, select a name and click the **Click to call** icon under the Phone column.

   The system dials the phone number stored in LDAP.

   For more information, see Calling an agent using Phonebook on page 54.

6. To erase the call history, click **Erase Call History**.

7. To delete individual calls from the log either right-click on the call and select **Delete**.

   Or

   Select a call and press `Delete` on the keyboard.

Chapter 6: Telephony - Other Phone mode

This chapter describes tasks that are specific to handling incoming customer calls using Agent Desktop in Other Phone mode at a remote location.

Avaya Contact Center Select (ACCS) supports the Remote Agent feature. This feature allows ACCS agents at remote locations to use their existing third-party telephones in conjunction with Agent Desktop.

When offsite agents log on to Agent Desktop in Other Phone mode the agent telephone rings. This is a *nail-up* call. Agents must answer this call on their telephone to complete the log on to Agent Desktop. After the logon completes, the agent phone is nailed-up and agents must use Agent Desktop for all subsequent telephony operations. When the agent logs out of ACCS by using the Log Out button on Agent Desktop, ACCS disconnects the nailed-up call.

> ⓘ **Important:**
>
> You must use Agent Desktop to perform telephony tasks in Other Phone mode. If you transfer or disconnect the nailed-up call using your telephone, you must complete recovery tasks to reinitiate and answer the nail-up call.

If the agent disconnects the nailed-up call while active on a customer call, ACCS automatically reinitiates the nailed-up call to the telephone. If the agent disconnects the nailed-up call while idle, ACCS reinitiates the nailed-up call when the next customer call is presented.

The procedures in this chapter apply only to voice contacts received by remote agents. For information about all of the telephony tasks you can perform using Agent Desktop, see the Telephony chapter. Multimedia contact types appear to a remote agent in exactly the same way as they do to an onsite agent.

Telephone status and display

The telephone displays information when a call presents to the agent. Typically, for agents using Agent Desktop in Other Phone mode, the agents voice URI appears on the telephone as the calling party. The telephone does not display information about Contact Center calls.

Logging on to Agent Desktop in Other Phone mode

About this task

Log on to Agent Desktop in Other Phone mode to receive calls at an offsite location. When you log on to Agent Desktop in Other Phone mode, your telephone rings. You must answer this call to complete the log on to Agent Desktop.

The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure

1. Start Agent Desktop.

2. On the Agent Desktop Top bar, from the **Status** list, select **Login**.

3. Click the **Telephony** tab.

4. Select **Other Phone** from the **Place and receive calls using** drop-down list.

   The **Telephone at** drop-down list appears.

5. From the **Telephone at** list, select the offsite telephone number at which you want to take calls. If configured, you can type a telephone number.

6. Click **Login**.

7. Answer your offsite telephone for your log on to complete.

   The Teleworker Status icon changes to green.

Accepting a call in Other Phone mode

Before you begin

- Ensure that you have set your status to **Go Ready**.

About this task

Accept and work with telephone calls. The relevant work item controls become active and the call timer appears on the work item.

If your administrator has configured Contact Center to run in Call Force Delay mode, you must handle all contacts presented to you.

Procedure

On Agent Desktop, select the new alerting work item and click the **Accept** work item control.

The left pane of Agent Desktop shows the customer details and history of all past calls with the contact.

Transferring a call in Other Phone mode

About this task

You can transfer a call to another agent using a supervised transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before you complete the transfer. You can also transfer the call without speaking to the third party.

⊛ **Note:**

> If you are transferring a call to a voice mail system, you must ensure that the correct DTMF tones are transferred to the voice mail system.

Procedure

1. On the work item, click **Transfer**.

2. In the Transfer window, **Supervised Transfer** is automatically selected.

3. Select **Enter Value** and type the number to which you want to transfer the call.

   Or

   Select **Phonebook** to open Phonebook and transfer the call using the click-to-transfer feature of Phonebook.

   The active call is placed on hold and the call is placed to a third party. While you speak with the third party, both the **Transfer** and **Hold** buttons on the phone flash to indicate that you have a customer on hold and that you must complete the transfer.

   ❶ **Important:**

   > If you use the **Enter Value** option to transfer a call to another agent, you must use the Contact Center number of the agent. This number appears beside the agent name on the Agent Desktop Top bar. Do not type an agent's third-party telephone extension number when you use the **Enter Value** option.

4. Speak to the third party if necessary or before the third party answers the call, click **Complete Transfer**.

   The call is transferred to the third party and is dropped from your phone.

Conferencing in another agent in Other Phone mode

About this task

You can conference another agent, if you want the agent to join your current call.

Procedure

1. On the work item, click **Conference** to place the customer on hold and open the Conference window.

2. In the Conference window, select **Enter Value** and type the number of the agent to conference into the call.

   Or

   Select **Phonebook** to open Phonebook and conference in another agent using the click-to-conference feature of Phonebook.

   > ❗ **Important:**
   >
   > If you use the **Enter Value** option to conference in another agent, you must use the Contact Center number of the agent. This number appears beside the agent name on the Agent Desktop Top bar. Do not type an agent's third-party telephone extension number when you use the **Enter Value** option.

3. Click **Conference Contact** to begin the conference.

4. Speak with the agent, if necessary, before you conference in the customer.

5. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.

Recovering the nailed-up call

About this task

If the Teleworker Status icon is red, you must click the icon to reestablish the nailed-up call. If no nailed-up call exists, you cannot receive or make voice calls. Multimedia contacts are unaffected.

> ✱ **Note:**
>
> In certain scenarios, you must log out of Agent Desktop and log on again in Other Phone mode to reinitiate the nail-up call. If Agent Desktop displays a **Teleworker Connection Inactive** warning message, you must change your status to Not Ready, log out of Agent Desktop, and log on again.

Procedure

1. If the Teleworker Status icon is red or a **Warning: Not Connected** message appears on Agent Desktop, click on the Teleworker Status icon.

   The system attempts to reinitiate the nail-up call to the third-party telephone and the Teleworker status icon changes to yellow.

2. Answer the call on your offsite telephone.

   The Teleworker status icon changes to green, and you can now handle voice calls again.

Chapter 7: Customer and contact details

Use Agent Desktop to create, search, view, and edit customer and contact details. With Agent Desktop, you can perform the following tasks:

- Create a customer record
- Search for a customer
- Add or edit customer information
- Set or clear the barred status for a customer phone number
- View or copy an intrinsic
- View or modify User to User Information
- View customer contact intrinsics
- Run an intrinsic-associated application
- Search for a contact
- Print search results
- View a contact
- Open a contact
- Close contacts (supervisors only)

When you create a customer record, you can apply a restriction flag to the customer using Agent Desktop. This can help your Contact Center to comply with General Data Protection Regulation (GDPR). For example, add a restricted flag to indicate to agents not to initiate unsolicited email messages to customers without consent. You can also add a restriction flag to an existing customer record. If you set the restricted flag for a customer, a label appears when you view Customer Details.

You can view the intrinsics on the **Customer Details** tab on Agent Desktop.

Prerequisites for working with customer and contact details

- Ensure that you have permission to handle multimedia contacts.

• Ensure that you have supervisor privileges, if you want to close multiple contacts.

Creating a customer record

Before you begin

• Ensure that you do not have any customer records open.

About this task

Create a customer record if the multimedia database does not currently have information about a customer. You can type the information directly into the dialog box, or you can copy text from an open contact into the customer details information.

> *** Note:**
>
> You must enter either a telephone number, email address, or SIP URI for a valid customer record. Entering only a customer name does not create a customer record in the database.

You can also apply a restriction flag to customers when you create a record. For example, add a restricted flag to indicate to agents not to initiate unsolicited email messages to customers without consent.

Procedure

1. In the Customer Details window, click **Create**.

2. In the **Title** box, select a salutary title for the customer.

3. In the **Last Name** box, type the surname of the customer.

4. In the **First Name** box, type the given name for the customer.

5. To apply a restriction flag to this customer, select the **Restricted** check box.

6. In the **E-mail Address** box, type an email address for the customer.

   > *** Note:**
   >
   > If you add more than one email address for a customer, you must select a default email address to use when you begin a contact with the customer.

7. In the **SIPUri** box, enter a SIP URI for the customer.

8. In the **Phone Type** box, select the type of phone number.

9. In the remaining telephone number boxes, type the international code, area code, and telephone number.

10. Click **Save**.

Searching for a customer

Before you begin

- Ensure that the Action bar is visible.

About this task

Search for a customer to view or edit customer details, if you want to create or review a customer contact.

You can search for a customer based on one or more of the following criteria:

- First name
- Last name
- Preferred agent (the agent who typically handles the contacts for the customer, based on who created the customer record, who handled the first contact by the customer, or who clicked **Take Ownership** of the customer record)
- Address
- Phone number
- Email address
- SIP URI

Procedure

1. Click **Customer Search**.

2. In the first column, select the criteria to use for the search (for example, last name or phone number).

3. In the second column, select the logical operators for the search criteria (for example, is or is not).

4. In the third column, type your search value (for example, Smith).

5. Click **Search**.

6. To sort the search results based on a field, click the column heading of the field by which you want to sort.

7. Double-click the customer record to open.

   > ✴ **Note:**
   >
   > If you attempt to contact a customer with a restricted flag, the system can display a warning message or block the call.

Adding or editing customer information

Before you begin

- Ensure that you do not have any customer records open.

About this task

Add or edit customer information when a change to a customer record is required.

Procedure

1. Click the **Details** tab in the Customer Details pane.

2. Click **Edit** to change the customer information.

   Or

   Click **Add** to add new information to the customer details.

3. Select the information to add or change.

4. Copy and paste the information from the text of a contact, or type the information into the field.

5. If you add additional telephone numbers or email addresses, ensure that you select one as the default.

6. Click **Save**.

Setting the barred status for a customer phone number

About this task

Bar a customer phone number, if the customer has requested for the Do Not Call (DNC) facility.

Procedure

1. Click the **Details** tab in the Customer Details pane.

2. Click **Edit** to change the customer information.

3. Select the phone number for which the bar status needs to set.

4. Select the **Barred** check box to tag the phone number as barred.

   This phone number cannot be called.

Clearing the barred status for a customer phone number

Before you begin

- Ensure that the customer phone number is barred.

About this task

Clear a customer phone number of its barred status.

Procedure

1. Click the **Details** tab in the Customer Details pane.

2. Click **Edit** to change the customer information.

3. Select the phone number to be cleared off its barred status.

4. Clear the **Barred** check box to tag the phone number as not-barred.

   This phone number can be called.

Viewing an intrinsic

Before you begin

- You must accept a contact.

About this task

View an intrinsic to copy the intrinsic or start an associated application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.

2. In the **Custom Fields** section, click the **Intrinsic** tab.

   The intrinsics appear.

Copying an intrinsic

About this task

Copy an intrinsic to use the intrinsic in another application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.

2. In the **Custom Fields** section, click the **Intrinsics** tab.

3. Right-click the required intrinsic.

4. Click **Copy**.

Copying the CLID of a customer

Before you begin

- Ensure that you are on a voice call.
- Ensure that your administrator has configured the setting that allows you to copy CLIDs.

About this task

You can copy the CLID of a customer CLID. This procedure is applicable only to voice calls in a SIP-enabled Contact Center.

✱ **Note:**

You cannot copy the CLID of a customer if either you or the customer drops the call.

Procedure

1. On the Agent Desktop, select a work item.
2. Beside the selected work item, click **Copy Phone Number to clipboard**.

   Agent Desktop copies the value of the AD_CLID intrinsic for incoming calls and the value of the CALLED_NUMBER intrinsic for outgoing calls.

Viewing User to User Information

About this task

View the User to User Information (UUI) associated with a work item.

Procedure

On the work item, click **Work Item Details**.

The **User to User Info** appears on the work item.

Modifying User to User Information

About this task

Modify the User to User Information (UUI) associated with a work item.

Procedure

1. On the work item, click **Work Item Details**.

   The **User to User Info** appears on the work item.

2. Double click **User to User Info**.

   The UUI data appears on the work item in a text box.

3. Modify the UUI data and press `Enter` to associate it with the work item.

Viewing customer contact intrinsics

Before you begin

- You must accept a contact.

About this task

You can view customer contact intrinsics to identify which default application starts after you accept a contact.

Procedure

1. On the Agent Desktop, click **Customer Details**.

2. In the **Custom Fields** section, click the **Intrinsics** tab.

   The **Intrinsic** tab displays the default information. To see more information click the **Display Raw Intrinsics** check box.

3. When you complete viewing customer contact intrinsics, right-click on the window on which you are viewing the details to close the window.

Launching an intrinsic-associated application manually

Before you begin

- You must accept a contact.

About this task

If you need an application to manage a contact, run an intrinsic-associated application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.

2. In the **Custom Fields** section, click the **Intrinsics** tab.

3. Right-click the required intrinsic value.

4. Select the required application.

   Agent Desktop displays the screen pop.

Searching for a contact

Before you begin

- Ensure that the Action bar is visible.

About this task

Search for a contact to create or review a customer contact.

You can search for a contact based on one or more of the following criteria:

- Agent (is, is not)
- Last action (is, is not)
- ID (less than, equal to, greater than)
- Subject (contains, begins with, ends with)
- Status (is, is not)
- Closed reason (is, is not) activity code
- Closed date (before, on, after)
- Skillset (is, is not)
- Type (is, is not) of contact
- Disposition code (is, is not)
- Mail To (contains, begins with, ends with)
- Mail From (contains, begins with, ends with)
- Arrival date (before, on, after)

The search results displays the agent who worked most recently on the contact.

If the search results in more contacts than one page can show, use the arrows to move to the Next, Previous, First, and Last page of the search results.

Procedure

1. Click **Contact Search**.

2. In the first column, select the criteria to use for the search (for example, Status or Skillset).

3. In the second column, select the logical operators for the search criteria (for example, is or is not).

4. In the third column, type your search value (for example, Closed).

5. Click **Search**.

6. To sort the search results based on a field, click the column heading of the field by which you want to sort.

7. Double-click the contact to open.

Printing search results

Before you begin

- Ensure that you have a printer set up and that you know the correct printer settings to select.

About this task

You can print the search results of either a customer or contact search.

Procedure

1. Generate the search results for a customer or contact search.

2. Click **Print**.

3. Select the correct settings for your printer.

Viewing a contact

Before you begin

- Ensure that your status is set to Not Ready.

About this task

View a contact if you want to review information for a contact, for example, to see how an agent handled a particular contact.

You cannot change information in the contact since the contact is not open.

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.

2. Right-click and select **Read-only Contact**.

   You can also double-click a contact to open the contact details.

3. View the contact details on the right pane of the Agent Desktop window.

   If Agent Desktop uses the EWC chat solution, when you view the EWC contact history, you see history of the chat session, including any whisper messages sent by the supervisors. If Agent Desktop uses the standard Web Communications chat solution, you can only see the history of the chat session and not the whisper messages sent by the supervisors.

Opening a contact

Before you begin

- Ensure that your status is set to Not Ready.
- Ensure that no other agent is currently working on the contact.

About this task

Pull and open a contact to add or edit information, to complete an outbound call, or to send a reply to an email message.

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.

2. If **Take Ownership** appears on the **Contact History** tab, another agent currently owns the customer and you cannot open this contact. If necessary, click **Take Ownership** to own the customer and click **Yes** to confirm.

3. Right-click the contact and select **Pull Contact**.

   If the **Pull Contact** item is not available, another agent currently has the contact open and you can only view the contact.

4. Click **Yes** to open the contact.

   The Agent Desktop automatically changes your status to Ready, answers the pulled contact, and then automatically changes your status to Not Ready again.

5. View the contact details on the right pane of the Agent Desktop window.

   You can now complete an outbound call, reply to an email message, or add an attachment to an email message.

Closing contacts

Before you begin

- Ensure that your Administrator has enabled closing multiple contacts for your user type.
- Ensure that no agent is currently working on any contact that you want to close.

About this task

You can close a contact by changing the contact status from Open to Closed. You can also close multiple contacts simultaneously if configured by your Administrator. Your Administrator can enable closing multiple contacts for agents, supervisors, or disable this feature for all types of users. You cannot close Web communications contacts.

You must enter a reason for closing contacts.

Procedure

1. Select the contact to close or select multiple contacts by pressing the `Ctrl` key while you click each contact.

   Selected contacts are highlighted in blue.

2. Right-click and select **Close All**.

3. In the Close Contact Details window, type the reason for closing the selected contacts.

4. Click **Close**.

Chapter 8: Outbound calls and callbacks

This chapter describes how to handle outbound calls and callbacks using the Agent Desktop.

The campaign administrator creates Outbound campaigns. When a campaign runs, the system pushes outbound contacts to your desktop in the same way that the system presents voice or multimedia contacts. When you accept an outbound contact, you are actively working on a call.

When you accept an outbound contact, the Agent Desktop displays the customer information and any other information related to the campaign. Some campaigns include a script that you need to follow, during the call.

If the campaign administrator selects manual agent dial, you can call the customer after you review the customer and campaign information. If the campaign administrator selects auto dial, the system automatically places the call for you after a defined number of seconds.

You use the Agent Desktop interface to perform the following outbound tasks:

- Accept and decline the incoming contact
- Make an outbound call
- Follow a script
- Review and update customer information
- End a call and assign a disposition code
- Schedule a callback
- Call the customer

You can also use Agent Desktop to create a callback. Both customers and agents can create scheduled callbacks. If your Contact Center is licensed for Web communications, a customer can request a call from an agent through a Customer Interface website. From the website, the customer can specify the reason they are requesting the callback, as well as a date and time for the call.

An agent can schedule a callback to a customer using the **Schedule Callback** button. The Schedule Callback feature is available only if your Contact Center is licensed for outbound contacts. However, a scheduled callback is not associated with an outbound campaign.

At the specified date and time, Agent Desktop presents the contact to an agent with the appropriate skillsets. To perform a callback, a supervisor must assign an agent the skillset to handle outbound contacts.

Accepting an outbound contact

Before you begin

- Ensure that you have set your status to Ready.
- Ensure that you have a skillset designated to handle outbound contacts.

About this task

Use the Agent Desktop interface to accept and handle outbound campaigns, one call at a time.

Your outbound administrator can configure the outbound calls in the following ways:

- Place the call immediately after you accept a call
- Place the call after a specified number of seconds
- Enable the agent to make the call

Administrators can configure Agent Desktop to give audio and visual alerts when a contact is presented.

Procedure

On the Agent Desktop work item, click **Accept**.

When you accept an outbound contact, you connect to the customer. Agent Desktop displays the customer details and the defined script for the call. The call is dialed according to the settings in the outbound campaign, and the call timer appears on the status bar.

Declining an outbound contact

About this task

You can decline an outbound contact if you want to reject the contact. Change your status to Not Ready if you are unavailable to handle contacts.

Procedure

On the Agent Desktop work item, click **Reject**.

Placing an outbound call

Before you begin

- Understand how to use a script.
- Understand how to record the result of a call.

About this task

You must accept or open an outbound contact before you place an outbound call. After accepting or opening an outbound contact, you can then review the customer details and the outbound

contact script. Your outbound administrator can configure outbound calls to be made immediately after you accept a call, or specify a number of seconds before the call is placed.

After you accept or open an outbound contact, you can call the customer and perform the following tasks:

- Verify customer information. After you successfully place the call, confirm that you have reached the correct customer by reviewing the contact information with the customer.

- Follow the script or complete the questionnaire, if applicable.

- Complete the call and assign a disposition code. Schedule a callback if required, enter applicable notes, and save the call results.

Procedure

1. On the Agent Desktop Action bar menu, click the **Initiate Call** button.

2. In the Enter Destination window, click the **Originate Call** icon to dial the default customer telephone number.

3. If you get to speak with the customer, proceed with the call using a script, if applicable.

4. If you do not get to speak with the customer, record the result of the call to update the contact with the appropriate disposition code, reschedule the call, and add applicable notes, if required.

5. Verify the customer information and update customer contact fields, if required.

Using a script

About this task

Use a script if the campaign administrator has assigned an agent script to the outbound campaign. The content of the agent script depends on the campaign. The script can contain an introduction, a conclusion, and a number of questions or suggested phrases. As you progress through the script, you can record your answers or comments directly on the **Call Script** tab. The customer responses are saved automatically.

✱ **Note:**

If the campaign administrator does not assign an agent script to the outbound campaign, the **Call Script** tab does not appear.

Procedure

1. On the Agent Desktop, click the **Call Script** tab.

2. Read the introduction to the customer.

3. Read each question present in the script to the customer.

4. Record the customer responses by using one of the three methods defined on the **Call Script** tab (the customer responses are saved automatically):

   - Select an option from the list. Depending on the outbound campaign, you can read the options to your customer and then select the option based on the customer's response.

   - Select an option.

   - Type the customer comments in a text box.

5. To disconnect from the call, click **Release**.

Recording the result

About this task

Record the result of a call by selecting a disposition code at the end of each outbound call. The campaign administrator defines disposition codes to use for each campaign. The disposition codes can be different for every campaign.

Some disposition codes indicate that the call was completed (for example, Not Interested or Sale Made), while other disposition codes indicate that the call was not completed (for example, No Answer or Number Busy). If the call was not completed, or if the customer requests for callback, you can schedule a callback.

Procedure

1. Click the **Disposition codes** tab.

2. Select the disposition code that most accurately reflects the result of your call.

Ending the call

About this task

End the call after you verify the customer details, answer all the questions in the outbound script, and record a disposition code.

The script questions and answers are saved in the multimedia database, if the disposition code is configured to do the same. Contact your supervisor or administrator for more information about which disposition codes to select.

If the call is incomplete, or the customer requests a callback, you can schedule a callback.

Procedure

Click **Release**.

Scheduling a callback

Before you begin

- Identify a customer for a scheduled callback.

About this task

Schedule a callback if you made a call from your desktop and the customer was not available. You can also schedule a callback in response to an email message or telephone request from a customer. A scheduled callback outbound contact is not pegged against an outbound campaign.

✱ **Note:**

If you schedule a callback to occur less than 10 minutes after the original call, in certain scenarios the callback does not occur precisely at the scheduled time. The callback occurs a few minutes after the scheduled time.

Procedure

1. Click **Schedule Callback**.

2. In the Schedule Callback window, select a skillset from the list to direct the contact to the agent with the most appropriate skills.

3. Select either an active agent for the call, or choose a specific agent from a list of all agents.

4. In the **Subject** box, type a subject for the callback.

5. In the **Time** box, select the time to perform the callback.

6. In the **Date** box, select the date to perform the callback.

   The dates appear according to the configuration set by your administrator.

7. In the **Reason** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Reason** box.

8. Click **Send**.

   The scheduled callback is entered into the database, ready to be routed when the selected date and time occurs. The scheduled callback is presented to the same agent who generates the callback.

Calling the customer manually

Before you begin

- Ensure that you are assigned to an outbound skillset.

About this task

With an outbound campaign contact, your administrator can configure the call to be automatically dialed when you accept the contact. However, a scheduled callback contact cannot be configured

to be dialed automatically. You must manually place the call after you review the contact information.

Procedure

1. When the contact is presented to your desktop, click **Accept**.

2. On the Agent Desktop Action bar menu, click **Initiate Call** to dial the default customer telephone number, which is displayed in the text box beside the **Initiate Call** button.

3. In the Enter Destination dialog box, click the **Originate Call** icon to dial the default customer telephone number.

4. When you complete the call, click **Release**.

5. If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.

Chapter 9: Email

Use Agent Desktop to perform the following tasks when you handle an email message:

- Accept or decline the incoming email contact
- Review and update customer information
- Send a reply
- Add an attachment
- Add inline images into an email message
- Add company images and logos to signatures
- Insert a template or auto signature
- Forward an email message
- Finish an email message
- Spell check an email message
- Postpone work on a contact
- Follow up on a contact
- Transferring a contact
- Print contact details
- Send an email message to an agent using the Phonebook
- Approve or reject an email (if assigned to approval skillsets)
- Redrafting an email (rejected email messages)

You can also use Agent Desktop to create a new email message.

> **!** **Important:**
>
> Contact Center limits the **To**, **CC**, and **BCC** fields to 4096 characters. If you exceed this limit, Agent Desktop truncates the address fields.
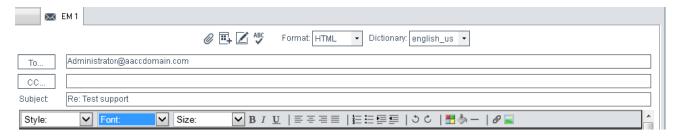
Figure 6: Example of the email toolbar

The Agent Desktop email editor offers improved email editing, formatting feature buttons, and management in HTML format email messages. The following formatting buttons are added to the email toolbar at the bottom of the email toolbar:

- Style
- Text font
- Text size
- Bold text
- Italic text
- Underlined text
- Align text left
- Align text center
- Align text right
- Justify text
- Numbers
- Bullets
- Increase text indent
- Decrease text indent
- Undo (Ctrl+z)
- Redo (Ctrl+y)
- Highlight text
- Change text color
- Horizontal line-rule support
- Insert hyperlink
- Insert inline image

These formatting and additional insertion buttons are only displayed on the email editor toolbar, when the email message is created using the HTML format. Email messages created with the plain text format do not support text formatting.

Blind carbon copy (Bcc:) is available only when using the email Address Book.

The following table describes the email feature buttons:

Table 7: Email editing and formatting controls

Control	Name of the Control	Function
	Insert a file	Insert an email attachment
	Insert a Template	Email templates
	Insert Signature	Insert a signature to the email message
	SpellCheck	Spell check the email message
	Bold	Bold the selected text
	Italic	Italicize the selected text
	Underline	Underline the selected text
	Select left to right	Align text with left margin
	Center	Center text
	Select right to left	Align text with right margin
	Justify	Justify text
	Numbers	Numbered list items
	Bullets	Bulleted list items
	Indent	Indent selected text
	Outdent	Outdent selected text
	Undo	Undo last change
	Redo	Redo the last change
	Color	Change color of selected text
	Highlight	Highlights selected text with a color chosen from the color palette
	Rule	Adds a continuous line under the selected location
	Link	Insert a hyperlink
	Image	Insert an inline image

Supervisor approval of email messages

Supervisors can approve or reject the email messages that agents attempt to send to customers, before the email reaches the customers. The approver of the email messages is the supervisor assigned to the approval skillset of the contacts that the agent handles. The approval process applies to email contacts only and does not apply to other contact types such as Fax, Scanned Documents, and SMS.

Based on your quality assurance requirements, regulatory requirements or agent training requirements, some or all of the email messages are sent for supervisor approval before sending the email messages to the customer. Administrators can configure email messages targeted for supervisor approval on a per skillset basis or per agent basis.

Agent Desktop follows this process for the supervisor approval of email messages:

- When an agent sends an email message, the email message is marked for approval and returned to the queue to a predetermined skillset for approval. The approval skillset is staffed by supervisors who review the agent response. Supervisors who review the email message that the agent sends to the customer must be assigned to the approval skillset. This process is exactly the same as the current process for an agent sending an email. The agent has no indication that the contact the agent is handling is a part of an approval process. For more information, see Creating an email message on page 90 or Replying to an email message on page 87.

  > ✱ **Note:**
  >
  > Agents cannot request approval of email messages. Administrators cannot configure keywords to trigger the approval process.

- If the supervisor approves the email, the email is either marked for sending to the customer, or returned to the queue marked for approval. The email is then targeted to the next approval skillset in the hierarchy. For more information, see Approving email messages on page 102.

- If the supervisor rejects the email message, the system marks the email message as rejected and returns the email message to the queue targeted to the previous skillset. The supervisor can add review comments so that the originator can redraft the email message: the administrator can configure whether to make comments for email approval mandatory or not. The email message flows through the rejection hierarchy until the email message reaches the originator for redrafting. For more information, see Rejecting an email message sent for approval on page 103 and Redrafting a rejected email message on page 104.

  > ✱ **Note:**
  >
  > Only the originator of the email message can edit or redraft the email message. Supervisors at all levels can add review comments only.

Accepting an incoming email message

About this task

Accept an incoming email message, when you are ready to receive the customer's email, display customer details and begin contact with a customer. The Agent Desktop displays the customer details and the call timer appears on the work item. The new incoming email message is presented as a new work item in the Work List window.

Procedure

On the Agent Desktop, click **Accept**.

The email message opens in the E-mail Display panel.

The customer details associated with the email message appears in the bottom left-hand corner of the Customer Details panel.

Declining an incoming email message

About this task

Decline an incoming email message if you cannot handle the email message. The new incoming email message disappears from your work list.

Procedure

On the Agent Desktop, click **Reject**.

The contact returns to the queue and your status is set to Not Ready.

Verifying customer information

About this task

Verify customer information by reviewing the information that is displayed in the left side of the Customer Details window. The Customer Details window displays information such as the customer details and the history of recent customer interactions.

If you accept a contact, or choose to read a contact, a maximum of 15 contacts appear before your selection and a maximum of 15 contacts appear after your selection on the **History** tab. Use the navigation arrow buttons to scroll through the contacts that appear in the customer history. A page shows a maximum of 31 contacts. The status bar indicates the contacts you are viewing and the total number of contacts in the history list.

You can use the Customer Details — History pane to view the details of previous interactions with the customer, including automatic responses sent and the content of previous email messages.

Procedure

1. On the Agent Desktop, in the Customer Details window, click the **Details** tab to verify customer contact information.

2. Click the **History** tab to view the details of previous interactions with the customer for all the Multimedia types.

3. Click the **CI Details** tab to view the Customer Interface website details.

Resetting customer password

About this task

You can reset the customer password, if a customer requests for a change of password.

Procedure

1. On the Agent Desktop Action bar, click **Customer Search**.

2. Type a name in the **Search** field in the last name, first name format.

   The search field is not case-sensitive.

3. Click **Search**.

   The list scrolls to the appropriate name or the closest match.

4. Select the customer whose password you want to change.

5. Click the **CI Details** tab and select **Reset Password**.

Replying to an email message

Before you begin

- Ensure that you understand how to use the address book to reply to a contact. See Using the address book to reply to a contact on page 91.
- Ensure that you understand how to create a template response. See Using a template response on page 93.
- Ensure that you understand how to add attachments to an email message. See Adding an attachment to your email response on page 94.
- Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 98.

About this task

Reply to an email message when a customer sends an email message to the Contact Center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features (present in the following list) on the Agent Desktop interface to help you to create your email response in HTML or plain text:

- Auto suggestions
- the address book
- one or more response templates
- an automatic signature
- an attached file
- the spelling checker

You can also add a comment to an email message in the **Agent Note** box as a reference for later communications with the customer. The customer does not see the information present in the **Agent Note** box.

Procedure

1. On the Agent Desktop, in the Email window, click **Reply**.

2. In the E-mail Response window, accept the default **To** email address. The default email address is the address from which the message was sent.

   Or

   Click **To** to add an email address of the customer, which is other than the default email address.

   Or

   Click **Cc** to add other email addresses from the corporate address book or multimedia database.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.

4. If Agent Desktop displays the Auto Suggestions pop-up, review the configured suggestions, and select one if it is appropriate to the customer query.

5. Add text to the reply using one or both of the following methods:

   - Type the message text.
   - Add a template response.

6. If you use the HTML format for creating the email message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.

   You cannot format a plain text email message.

7. To change the text size, select the text and click the up arrow to increase the font size, or click the down arrow to decrease the font size.

8. To perform a spell check, click the **SpellCheck** icon.

9. To insert an automatic signature to the email message, click the **Insert Signature** icon.

10. To add an attachment to the email response, click **Insert a file**.

11. In the **Agent Note** box, type additional information about the contact or the customer, if required.

    Only agents and supervisors can view the information in the **Agent Note** box.

12. Click **Send**.

13. Close the contact.

    If required, select a reason for closing the contact.

Using auto suggestions to reply to an email contact

About this task

Contact Center administrators can create suggested responses that they attach to routing rules. When an email contact matches a routing rule that has suggested responses, Agent Desktop displays the Auto Suggestions pane. You can select a recommended suggestion if it is appropriate to the customer query.

You can edit the suggestion to make it specific to the customer contact to which you are replying.

If the recommended suggestions are not appropriate to the specific customer query, you can search for other suggestions that the administrator has created.

Before you begin

- Ensure that you understand how to reply to a contact. See Replying to an email message on page 87.

Procedure

1. On the Agent Desktop, in the Email window, click **Reply**.

    If the administrator configured auto suggestions for the rule that routed this contact, Agent Desktop displays the Auto Suggestions pane.

2. In the Auto Suggestions pane, hover your mouse over each suggestion to review the content.

3. Select an appropriate suggestion for your reply.

    Agent Desktop copies the auto suggestion text to the reply.

4. If you think there is a better auto suggestion for this contact:

    a. In the Auto Suggestions pane, click **Search**.

    b. In the **Categories** field, select a category to refine your search.

    c. In the **Key Word** field, type a word on which you want to search.

    d. Click **Search**.

       Agent Desktop displays the suggestion search results. Hover your mouse over each suggestion to review the content, and select an appropriate response.

5. Edit the text of the reply to customize it for the customer.

6. To perform a spell check, click the **SpellCheck** icon.

7. To insert an automatic signature to the email message, click the **Insert Signature** icon.

8. To add an attachment to the email response, click **Insert a file**.

9. In the **Agent Note** box, type additional information about the contact or the customer, if required.

   Only agents and supervisors can view the information in the **Agent Note** box.

10. Click **Send**.

11. Close the contact.

    If required, select a reason for closing the contact.

Creating an email message

Before you begin

• Ensure that you are assigned to an email skillset.

About this task

Create an email message to send to a customer.

Procedure

1. On the Agent Desktop Action bar, select **Initiate Email**.

2. In the **To** box, enter the email address of the customer.

   If additional addresses are required add them to the **Cc** box.

3. Click **Create Email**.

4. In the **Subject** box, type the subject of the message.

5. In the body text box, add the email response. You can add the response using one or both of the following methods:

   • Type the message text.

   • Add a template response.

6. To attach a file to the email message, click **Insert a file**.

7. Select the appropriate skillset from the **Skillset** list.

8. In the **Agent Note** box, type additional information about the contact or the customer, if required.

   Only agents and supervisors can view the information in the **Agent Note** box.

9. Click **Send**.

The system searches the database for the customer's email address. If the customer does not exist in the database, the system creates a new customer record, as well as a new contact and response record.

The contact closes automatically.

Using the address book to reply to a contact

About this task

Use the address book to search for an email address in the corporate address book or in the customer database, when you use email to reply to a customer or transfer a contact. You can search for addresses to add to the **To**, carbon copy (**Cc**), or blind carbon copy (**Bcc**) fields of your email message. The address book can contain information from an external directory, a local directory, or a customer database.

Procedure

1. In the email window, click **To** or **Cc**.

2. In the Select Names dialog box, from the **Search for records from** box, select the database to search for customer address. Select either **Customers** or **LDAP**.

3. If you select **Customers**:

   a. Define your search criteria and type a name in the **Search** field. The **Search** field is not case-sensitive.

   b. Click **Search**.

   c. Select a name from the results list and click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.

      ❋ **Note:**

      Alternatively, you can type a name in the **Manually Insert Address** box and click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.

4. If you select **LDAP**:

   Select a name from the list, and then click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.

      ❋ **Note:**

      Alternatively, you can type a name in the **Manually Insert Address** box and click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.

5. After you select all the required recipients for the email message, click **OK**.

Removing a name from the recipient list

About this task

Remove a name from the recipient list if you do not want to send the email message to that particular contact.

> *** Note:**
>
> Removing a name from the recipient list does not remove the name from your address book or database.

Procedure

Select the name from the **To**, **Cc**, or **Bcc** field, and then press `Delete` on your keyboard.

Creating a template response

About this task

Create and store your own templates to use predefined email messages or responses to standard customer queries. You can use a part of or all of the template text as your email response.

> *** Note:**
>
> Agent Desktop supports only text and HTML template files. You can use any editor to create a template file, but ensure that you save the template file as a .txt or an .html file.

Procedure

1. Create the response message in a text editor, such as Notepad.

2. Click **Save As**.

3. Name the file using a descriptive name and ensure that the file name has a .txt or an .html extension. For example, `WarrantyURL.txt`.

4. Navigate to the appropriate folder to store the template response file.

5. Save the file.

Defining your default template folder

About this task

Define the location of the default template folder, if you want to use a template in an email response.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.

2. Select the **Preferences** tab.

3. In the **Default Template Location** box, type the complete path to the template folder.

   Or

   Click **Change** to select a new folder location.

4. Click **Save**.

Using a template response

About this task

Use a template response that you previously created for responses to standard customer queries.

Procedure

1. In the email window, click **Insert a Template**.

2. Navigate to the template folder.

   If you have defined a template folder in the user settings, the default template folder automatically appears.

3. Select the template file, and then click **Open** to display the template text.

4. Edit the text in the body of the email message, if necessary.

Defining your default attachment folder

About this task

Define a default attachment folder in which to store files to add as attachments to email messages. You can add a file from the Shared Files folder that your administrator creates, or you can attach files by navigating to any other directory, folder, or subfolder on your computer. Your default attachment folder must be in a user directory. If you have not set a default attachment folder or if the default attachment folder does not exist then, by default Agent Desktop opens the `Documents` folder on your computer.

⊛ **Note:**

You must save file attachments with UTF-8 encoding.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.

2. Select the **Preferences** tab.

3. In the **Default Attachment Location** box, type the complete path to the folder containing the attachment.

   Or

   Click **Change** to change the current folder location.

4. Click **Save**.

Adding an attachment to your email response

About this task

You can add one or more file attachments to an email message that you send to a customer.

Procedure

1. In the email window, click **Insert a File**.

2. Click **Attach**.

   If you have defined an attachment folder in the user settings, the default attachment folder automatically appears.

   If you have not defined an attachment folder or if the attachment folder no longer exists, then by default Agent Desktop opens the `Documents` folder on your computer.

3. To add a file from a different location, navigate to the appropriate directory or folder.

   By default, Agent Desktop uses a user directory for file browsing. You must not browse to a hidden drive such as `C:\` to add attachments. A user directory is the directory that Agent Desktop opens by default, if you have defined a default attachment folder.

4. Locate and select the file to attach.

5. Click **Open**.

   Administrators configure the supported list of file extensions that agents can attach to emails. When you add a file attachment to an email, Agent Desktop displays the configured list of file attachment extensions in the Open dialog box. If the attachment type is not in the configured list, Agent Desktop displays a warning message and does not attach the file to the email.

Viewing email attachments

About this task

Use the Contact Details window to view email attachments. The attachments can be based on the accepted contact types (voice mail, fax, or scanned document).

> **✱ Note:**
>
> Some browsers do not support some attachment formats.

Procedure

1. In the Contact Details window, click the **History** tab.

2. Double-click **Attachments** to view attachments in a new browser window.

Removing an attachment from an email response

About this task

You can remove one or more attachments from an email response to a contact.

Procedure

1. In the email window, click **Remove**.

2. In the **Select Attachment(s) to remove** list, select the attachment you want to delete.

   Use `Ctrl+click` to select multiple attachments.

3. Click **OK**.

Adding inline images

About this task

You can add one or more inline images to an email message that you send to a customer.

Inline attachments display complete information within the body of the email. This makes the information easily accessible to customers, even without explicitly opening the attachment. For example, you can add a company logo as an inline image to increase brand awareness.

> **✱ Note:**
>
> The inline image formats supported are .gif, .bmp, .jpg, .jpeg, and .png.

Procedure

1. On the email toolbar, click the **Image** icon.

2. In the body text box, position your cursor where you want to add your image.

3. Click **Browse** to locate and select the image.

   Or

   Type the file system path for the image in the **Image Address** box.

   By default, Agent Desktop uses a user directory for file browsing. You must not browse to a hidden drive such as `C:\` to select an image. A user directory is the directory that Agent Desktop opens by default, if you have defined a default attachment folder. If you have not defined the attachment folder or if the attachment folder no longer exists, then by default Agent Desktop opens the `Documents` folder on your computer.

4. Optionally, enter the **Alternate text** for the image.

5. Select the appropriate alignment option, for the image, from the **Align** drop-down list.

6. Optionally, enter the **Border** value to create a border around the image.

7. Optionally, enter the **Margin** value to insert a margin around the image.

8. Click **Insert Image**.

   The image is inserted at the cursor position.

Variable definitions

Name	Description
Browse	Browse to locate the inline image that you want to include in the email message. By default, Agent Desktop uses a user directory for file browsing. You must not browse to a hidden drive such as `C:\` to add attachments.
Image Address	The file system path for the inline image that you want to include in the email message.
Alternate text	The alternative text for the image. Alternate text is what the customer sees if their email client cannot display the image.
Align	Alignment of the image. The options are inline, left and right.
Border	Border around the image. For example, enter 2, to add a double-sized border around the image.
Margin	Margin around the image.

Adding company images and logos to signatures

About this task

You can create a signature that you can add at the bottom of an outgoing message. You can add company images and logos to signatures.

Administrators set the parameters of the signatures that you can add, including:

- Maximum number of images allowed for each signature
- Maximum size of each image allowed for each signature
- Maximum amount of text allowed for each signature

✱ Note:

The image formats supported are .gif, .jpg, .jpeg, and .png. Animated gifs are displayed without the animation.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.

2. Click the **Preferences** tab.

3. In the Email Signature section, click **Signature**.

    Agent Desktop displays the Signature Editor dialog box.

4. In the Body text box, position the cursor to where you want to add the signature text.

    To format the signature, use the editing and formatting buttons present on the **Signature Editor** toolbar.

5. To add company images and logos to the signature, in the Body text box, position the cursor to where you want to add the image and perform the following:

    a. Click **Insert Image** ( ).

    b. Click **Browse** to find and select the image.

        You can also type the file system path for the image in the **Image Address** field.

        ✱ Note:

        Do not drag or drop, or cut-and-paste images into the editor.

    c. Click **OK**.

        The system inserts the image at the cursor position.

    d. Adjust the image according to your preferences in the editor.

    e. Click **OK**.

6. To save the signature, on the **Preferences** tab, click **Save**.

Using the spelling checker

About this task

Use the spelling checker on the Agent Desktop interface to locate spelling errors in your email message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select the default language for the spell checking dictionary. You can also specify a spell check dictionary for a particular email message by selecting a language from the list on the right side of the email toolbar.

> ✱ **Note:**
>
> By default, Agent Desktop supports a range of dictionaries. Check the dictionaries supported by Agent Desktop by clicking on the **Default** drop-box in the SpellChecker section on the User Settings window.

The spell check feature highlights words in the email subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

> ✱ **Note:**
>
> The spell check feature does not check spelling in attachments.

Procedure

1. Once you complete typing your email message, click the **SpellCheck** icon.

2. If the spell check feature highlights a word, perform one of the following steps:

   - Click **Ignore** to keep the original spelling of the word.

   - Click **Ignore All** to keep the original spelling of all instances of the word.

   - Click **Add** to add the selected word to the dictionary.

   - Click **Replace** to replace the word with the suggested text.

   - Click **Replace All** to replace all instances of the word with the suggested text.

   - Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits, words in uppercase, and words with HTML tags.

   - Click **Cancel** to terminate the spell check.

Closing the email contact

About this task

Close the email contact when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the contact.

2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your email contact.

3. Click **Close**.

Postponing work on a contact

About this task

You can postpone work on a contact after you have started to compose a reply. For example, postpone a contact if you need to wait for further information before replying to the contact. When you postpone the contact, you reschedule it for Contact Center re-present it at a future time and date.

If you postpone an email for less than 10 minutes, in certain scenarios the email does not reopen precisely at the scheduled time. The email reopens a few minutes after the scheduled time.

> **❶ Important:**
>
> If you have started composing a reply and you postpone the contact, Contact Center does not save the content of the reply. Before clicking **Reschedule**, copy and save text from the reply if you want it for when Contact Center presents it to you again.

Procedure

1. On an open email contact, click **Finish**.

   Agent Desktop displays the Disposition screen.

2. Click **Reschedule**.

3. In the Present Contact at dialog box, enter the time and date to reopen the contact.

   Contact Center resets the contact to present to you at the time you specify.

4. In the **Agent Note** field, add a note to remind yourself why you rescheduled the contact.

5. Click **Save**.

   You still own the contact and can continue to work on the contact when Contact Center presents it to you again. You can view the pending contact in the **History** tab.

Following up on a contact

About this task

Follow up on a contact after you reply to a contact but want to perform a follow-up action, for example, to transfer a contact to another agent.

Procedure

1. Reply to the contact.

2. Click **Follow-up**.

   The email display control appears.

3. Perform the necessary follow-up action.

Transferring a contact within the Contact Center

About this task

Transfer a contact to another skillset or to a specific agent within the Contact Center.

When you transfer a contact to a skillset or an agent, you also transfer ownership of the contact. The system automatically forwards the entire contact, including any attachments, to the new agent. You can also add additional information for the contact.

Procedure

1. Click **Transfer**.

2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the contact to a specific agent.

3. Select the skillset or agent to which you want to transfer the contact.

4. In the **Agent Note** box, type additional information about the reason for the transfer.

5. Click **Transfer**.

Transferring a contact outside the Contact Center

About this task

Transfer a contact to an email address outside the Contact Center for consultation.

When you transfer a contact to an external email address, you must manually add any attachments you want to send with the email message.

Procedure

1. Click **Transfer**.

2. Click the **External** tab.

3. Enter the email address to which you want to transfer the contact.

   Or

   Click **To** to select an address from the corporate address book.

4. In the **Agent Note** box, type additional information about the reason for the transfer.

5. To add an attachment, click **Attach**.

6. Click **Transfer**.

Printing contact details

About this task

Print a summary of the interaction with a contact. All information that is displayed in the bottom-left of the email or Outbound contact window gets printed. Print Preview is also supported.

Procedure

Click **Print Contact**.

Sending an email message to an agent using Phonebook

About this task

You can use Phonebook to send an email message to an agent through the LDAP agent contact directory.

The LDAP directory can contain a lot of contacts. You can filter contacts based on the following three types of users:

- Favorites
- Speed Dials
- Custom Contacts

Once you filter contacts, it becomes easier to search for the contact and send an email message to that contact. For more information, see

Procedure

1. On the Agent Desktop, click **Phonebook**.

The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

2. Search for a contact.

   For more information about searching for a contact, see <u>Searching for a contact in Phonebook</u> on page 54.

3. Select a name, and click the **Click to email** icon under the Email column.

   The systems displays the email window with the default address of the agent in the **To** address field.

4. In the **Subject** box, type the subject of the email message.

5. In the **Body** text box, type the message text.

6. To add a file to the email message, click **Insert a file**.

7. Click **Send**.

Approving email messages

Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.
- Ensure that the administrators have configured the approval hierarchy for email messages.

About this task

A supervisor receives an email message for approval when an agent replies to a contact or sends an email message. The email message is marked for approval and returned to the queue to a pre-determined skillset for approval. The agent has no indication that the contact the agent is handling is part of an approval process.

Agent Desktop presents the supervisor with the option to approve or reject the email message. Supervisors can view existing review comments and enter additional review comments.

Procedure

1. Accept the incoming email message. See <u>Accepting an incoming email message</u> on page 86.

2. Review the email message under the Proposed Email section.

3. In the Customer Details window, click the **Review** tab to view previously entered review comments.

   In the **Review** tab, you can also view the ID and the name of the previous supervisors, the time of approval, and the hierarchy level.

4. In the **Review Comments** field, add your comments for the email message.

5. Click **Approve**.

The email is either marked for sending to the customer, or returned to the queue marked for approval and targeted to the next approval skillset in the hierarchy, depending on the approval hierarchy set up by the administrator.

The system displays the Approval Confirmation dialog box.

6. Click **Yes**.

Rejecting an email message sent for approval

Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.

- Ensure that the administrators have configured the rejection hierarchy for email messages.

About this task

A supervisor can reject an email message that is sent for approval.

Procedure

1. Accept the incoming email message. See [Accepting an incoming email message](#) on page 86.

2. Review the email message under the Proposed Email section.

3. In the Customer Details window, click the **Review** tab to view previously entered review comments.

   In the **Review** tab, you can also view the ID and the name of the previous supervisors, the time of approval or rejection, and the hierarchy level.

4. In the **Review Comments** field, add your comments for the email message.

5. Click **Reject**.

   The email is marked as rejected and returned either to the originator or to the queue targeted to the previous skillset depending on the rejection hierarchy set up by the administrator. The email message is sent through the rejection hierarchy to the originator for a redraft of the email message. If a rejection hierarchy is set up by your administrator, supervisors at each level must approve the rejection.

   The system displays the Rejection Confirmation dialog box.

6. Click **Yes**.

Redrafting a rejected email message

About this task

The agent (originator of the email message) receives the rejected email message. The agent must redraft the email message and resubmit the email for approval. Agents can redraft the email message based on the comments added by the supervisors. The agent can also add additional comments for supervisors. After the agent redrafts the email message, the email must go through the complete approval hierarchy.

> ✳ **Note:**
>
> Only the originator of the email message can edit or redraft the email message. Supervisors at all levels can add review comments to the email message only.

Procedure

1. Accept the incoming email message. See [Accepting an incoming email message](#) on page 86.

2. In the Customer Details window, click the **Review** tab to review the comments added by the supervisors.

   In the **Review** tab, you can also view the ID and the name of the supervisor, the time of rejection, and the hierarchy level.

3. Under Proposed Email, click **Redraft** to rewrite the email message based on the comments added by the supervisors.

4. **(Optional)** In the **Agent Note** field, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.

5. In the **Review Comments** field, add your comments for the supervisors.

6. Click **Send**.

7. Click **Close**.

   The email is returned to the queue marked for approval and targeted to the next approval skillset in the hierarchy, depending on the approval hierarchy set up by the administrator.

Chapter 10: Fax message

This chapter describes how to perform fax message tasks. Use Agent Desktop to perform the following tasks when you handle a fax message:

- Accept or decline the incoming fax message
- Review the fax message
- Send a reply
- Close a fax message
- Transfer a fax message

Fax messages from customers are forwarded by a fax server to an email address within the Contact Center. The fax is sent to an appropriate skillset queue. If you are assigned to this skillset, then the fax message is presented to you. You reply to the fax message by sending an email message back to the fax server. The fax server then sends the reply fax to the customer.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling fax messages.

Accepting an incoming fax message

About this task

Accept an incoming fax message to view the message. The Agent Desktop presents this new fax message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new fax message work item, and click **Accept**.

The fax message opens in the fax display panel.

Declining an incoming fax message

About this task

Decline an incoming fax message if you cannot handle the fax message. The new incoming fax message disappears from your work list.

Procedure

On the Agent Desktop, select the new fax message work item and click **Reject**.

The contact returns to the queue and your status is set to Not Ready.

Reviewing a fax message

Before you begin

- Ensure that you have accepted a fax message and opened it in the fax viewer.

About this task

Use the Agent Desktop fax viewer to review a fax message.

Procedure

1. On the Agent Desktop fax viewer, click **Navigate** to view all the pages of the fax message.

2. Click **Rotation** to rotate the fax message.

3. Click **Zoom** to magnify the fax message.

Replying to a fax message

Before you begin

- Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 98.

About this task

Reply to a fax message when a customer sends a fax message to the Contact Center requesting a response. You reply to a fax message by sending an email message to a fax server. The fax server then sends the reply fax back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.

2. In the Fax Response window, accept the default email address that appears in the **To** box.

   The default email address is the same email address from which the message was sent.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.

4. Type the reply in the email editor text box.

5. If you use the HTML format for creating the email message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.

   You cannot format email messages that are created in plain text.

6. To perform a spell check, click the **SpellCheck** icon.

7. To insert an automatic signature to the fax message, click the **Insert Signature** icon.

8. In the **Agent Note** box, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.

9. Click **Send**.

10. Close the contact.

    If required, select a reason for closing the contact.

Closing a fax message

About this task

Close a fax message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the fax message.

2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your fax message.

Transferring a fax message

About this task

Transfer a fax message to another skillset or to a specific agent in the Contact Center. When you transfer a fax message to a skillset or agent, you also transfer the ownership of the contact.

Procedure

1. Click **Transfer**.

2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

Or

Click the **User** tab to assign the fax message to a specific agent.

3. Select the skillset or agent to which you want to transfer the contact.

4. In the **Agent Note** box, type additional information about the reason for the transfer.

5. Click **Transfer**.

Chapter 11: Scanned document

This chapter describes how to perform tasks to handle scanned documents. Use Agent Desktop to perform the following tasks when you handle a scanned document message:

- Accept or decline an incoming scanned document
- Review the scanned document
- Reply to a scanned document
- Close the scanned document
- Transfer a scanned document

A scanned document is an electronic version of a printed page or document. Scanned documents are forwarded in the TIFF format, in a Contact Center, by a document imaging server to an email address. You can reply to the scanned document by sending an email message to a printer. The printed email message is then sent back to the customer.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling scanned documents.

Accepting an incoming scanned document message

About this task

Accept an incoming scanned document message to view the message. The Agent Desktop presents this new scanned document as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new scanned document work item, and click **Accept**.

The scanned document opens in the document display panel.

Declining an incoming scanned document message

About this task

Decline an incoming scanned document message if you cannot handle the message. The new incoming scanned document message disappears from your work list.

Procedure

On the Agent Desktop, select the new scanned document work item and click **Reject**.

The contact returns to the queue and your status is set to Not Ready.

Reviewing a scanned document message

Before you begin

• Ensure that you have accepted a scanned document and opened it in the document viewer.

About this task

Use the Agent Desktop document viewer to review a scanned document message.

Procedure

1. On the Agent Desktop document viewer, click **Navigate** to view all the pages of the document.

2. Click **Rotation** to rotate the scanned document.

3. Click **Zoom** to magnify the scanned document.

Replying to a scanned document message

Before you begin

• Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 98.

About this task

Reply to a scanned document message when a customer sends a scanned document to the Contact Center requesting a response. You can reply to the scanned document by sending an email message to a printer. The printed email message is then sent back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.

2. In the Response window, accept the default email address that appears in the **To** box.

The default email address is the same email address from which the message was sent.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.

4. Type the reply in the email editor text box.

5. If you use the HTML format for creating the email message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.

   You cannot format email messages that are created in plain text.

6. To perform a spell check, click the **SpellCheck** icon.

7. To insert an automatic signature to the message, click the **Insert Signature** icon.

8. In the **Agent Note** box, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.

9. Click **Send**.

10. Close the contact.

    If required, select a reason for closing the contact.

Closing a scanned document message

About this task

Close the scanned document message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the scanned document message.

2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your scanned document message.

Transferring a scanned document

About this task

Transfer a scanned document to another skillset or to a specific agent within the Contact Center. When you transfer a scanned document to a skillset or agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.

2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the scanned document to a specific agent.

3. Select the skillset or agent to which you want to transfer the contact.

4. In the **Agent Note** box, type additional information about the reason for the transfer.

5. Click **Transfer**.

Chapter 12: Voicemail messages

This chapter describes how to perform tasks to handle voicemail messages. Use Agent Desktop to perform the following tasks when you handle a voicemail message:

- Accept or decline the incoming voicemail message
- Listen to a voicemail message
- Reply to a voicemail message
- Close a voicemail message
- Transfer a voicemail message

In the Contact Center, voicemail messages are forwarded by a voicemail server to an email address as a .wav attachment. The voicemail message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles voicemail message, then the voicemail message is presented to you.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling voicemail messages.

Accepting an incoming voicemail message

About this task

Accept an incoming voicemail message to view the message. Agent Desktop presents this new voicemail message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new voicemail message work item, and click **Accept**.

The voicemail message opens in the email display panel as a .wav attachment.

Declining an incoming voicemail message

About this task

Decline an incoming voicemail message if you cannot handle it. The new incoming voicemail message disappears from your work list.

Procedure

On Agent Desktop, select the new voicemail message work item and click **Reject**.

The contact returns to the queue and your status is set to Not Ready.

Listening to a voicemail message

About this task

Use a media player, such as Windows Media Player, to listen to a voicemail message. The voicemail message is in the .wav audio file format.

Before you begin

Accept the voicemail message and open it in the email viewer.

Procedure

1. On the Agent Desktop email viewer, under **Attachments**, double-click the .wav attachment to open it in your default media player.

2. Listen to the voicemail message.

Replying to a voicemail message

About this task

Reply to a voicemail message if the customer requested a response. You can reply to the voicemail message by calling the customer.

Before you begin

Ensure that you obtain the customer's contact details from the voicemail or from the Customer Details panel.

Procedure

1. On the Agent Desktop Action bar menu, click **Initiate Call**.

2. In the text box, enter the phone number to dial.

3. Click **Initiate Call** again to make the call.

A new work item is added to the work list and the call timer starts to increment.

4. Click **Release** when you complete the call.

5. If required by your supervisor, type an activity code in the **Activity Code** box, and then press `Enter`.

Closing a voicemail message

About this task

Close the voicemail message when the contact is complete. When you close a contact, select the appropriate reason code. The reason codes displayed are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the voice message.

2. Select one of the configured reason codes that best describes the reason you closed your voicemail message.

Transferring a voicemail message

About this task

Transfer a voicemail message to another skillset or to a specific agent within the Contact Center. When you transfer a voicemail message, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.

2. Do one of the following:

   • Click the **Skillset** to assign the contact to any agent with a particular skillset.

   • Click the **User** tab to assign the voicemail message to a specific agent.

3. Select the skillset or agent to which you want to transfer the contact.

4. In the **Agent Note** field, type additional information about the reason for the transfer.

5. Click **Transfer** to complete the transfer.

Chapter 13: Short Message Service text message

This chapter describes how to perform tasks to handle Short Message Service (SMS) text message tasks. Use Agent Desktop to perform the following tasks when you handle an SMS text message:

- Accept or decline the incoming SMS text message
- Send a reply
- Check the spelling of an SMS text message
- Close an SMS text message contact
- Transfer an SMS text message

SMS text messages from customers are forwarded by an SMS gateway to an email address within the Contact Center. The SMS text message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles SMS text messages, then the SMS text message is presented to you.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling SMS text messages.

Accepting an incoming SMS text message

About this task

Accept an incoming SMS text message to display customer details and begin contact with a customer. The Agent Desktop displays the customer details and the call timer appears on the work item. The new incoming SMS text message is presented as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new SMS text message work item, and click **Accept**.

The SMS text message opens in the display panel.

The customer details for the SMS text message appears in the bottom-left hand corner of the Customer Details panel.

Declining an incoming SMS text message

About this task

Decline an incoming SMS text message if you cannot handle the message.

Procedure

On the Agent Desktop, select the new SMS text message work item and click **Reject**.

The SMS text message work item is removed from the work list. The contact returns to the queue and your status is set to Not Ready.

Replying to an SMS text message

About this task

Reply to an SMS text message when a customer sends an SMS text message to the Contact Center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features on the Agent Desktop interface to help you to create your response:

- one or more response templates
- the spelling checker

You can add a comment to the message in the **Agent Note** box to provides reference for later communications with the customer. The customer does not see the content of the **Agent Note** box.

Procedure

1. After you review the customer contact, click **Reply**.

2. In the E-mail Response window, accept the default To email address, with the same email address from which the message was sent.

   Or

   Click **To**, **Cc** to add other email addresses from the corporate address book or multimedia database.

3. In the **Subject** box, accept the subject currently displayed or edit the subject.

4. Add text to the reply using one or both of the following methods:

- Type the message text.
- Add a template response.

5. To perform a spell check, click the **SpellCheck** icon.

6. In the **Agent Note** box, type additional information about the contact or the customer.

    Only agents and supervisors can view the information in the **Agent Note** box.

7. Click **Send**.

8. Close the contact.

    If required, select a reason for closing the contact.

Using the spelling checker

About this task

Use the spell check feature on the Agent Desktop interface to locate spelling errors in your message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select a default language for the spell check dictionary. You can also specify a spell check dictionary for a particular email message by selecting a language from the list on the right side of the toolbar.

The spell check feature highlights words in the SMS text message subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

Procedure

1. Once you complete typing your SMS text message, click the **SpellCheck** icon.

2. If the spell check feature highlights a word, perform one of the following steps:

- Click **Ignore** to keep the original spelling of the word.
- Click **Ignore All** to keep the original spelling of all instances of the word.
- Click **Add** to add the selected word to the dictionary.
- Click **Replace** to replace the word with the suggested text.
- Click **Replace All** to replace all instances of the word with the suggested text.
- Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
- Click **Cancel** to terminate the spell check.

Closing an SMS text message contact

About this task

Close the SMS text message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the contact.

2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your SMS text message.

Transferring an SMS text message

About this task

Transfer an SMS text message to another skillset or to a specific agent within the Contact Center.

When you transfer an SMS text message to a skillset or an agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.

2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the contact to a specific agent.

3. Select the skillset or agent to which you want to transfer the SMS text message.

4. Select the **External** tab if you want to transfer the SMS text message outside the Contact Center for consultation.

5. In the **Agent Note** box, type additional information about the reason for the transfer.

6. Click **Transfer**.

Chapter 14: Web communications

Contact Center provides two services for web chat: the Web Communications text chat and Enterprise Web Chat (EWC). EWC is a licensed feature.

Contact Center selects EWC as the web chat solution, if the following criteria are satisfied:

1. You are logged on to Agent Desktop.
2. You are assigned to a skillset for handling web communications.
3. Contact Center is licensed for EWC.

This chapter describes how to perform the tasks to handle Web communications contacts. This chapter describes how to use the following Web communications features to communicate directly with customers in real time over the Internet using Agent Desktop:

- Accept or decline an incoming contact
- Customize a tab name
- Review and update customer information
- Send an automated response
- Push a Web page
- Transfer a chat session
- Conference a chat session
- Observe a Web Communications contact (supervisor/agent only)
- Barge-in on a Web Communications contact (supervisor/agent only)
- Check whether the customer's browser is still connected
- Check the time of the most recent customer action and whether the customer is currently typing a message
- Respond to the customer (email or voice) if more information or clarification is needed
- End a chat session
- Send the chat log in an email message

* **Note:**

Handling of web communications contacts is the same irrespective of whether Contact Center uses Web Communications chat or EWC. For Agent Desktop to handle EWC contacts,

administrators must enable a setting on the Contact Center Multimedia (CCMM) Administration utility.

Accepting a Web communications contact

Before you begin

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling Web communications.

About this task

Accept a Web communications contact to communicate privately with a customer in real time over the Internet. An agent and a customer can use the text chat component of the Agent Desktop to conduct a two-way conversation by exchanging messages.

A customer requests a chat session by clicking the **Text Chat** icon on the website. The customer is presented with a form to fill in and select the appropriate skillset, subject, and objective for their chat session. The customer is then placed into Web-on-hold, or a similar treatment configured in your Contact Center, while waiting for an agent to accept their chat request.

The text chat frame displays a complete record of the conversation as well as any URLs that you previewed or pushed to the customer. Each chat message can contain up to 4045 characters.

The Agent Desktop can be configured to give audio and visual alerts when a contact is presented. These features are configured by an administrator, using the Contact Center Multimedia Administration tool.

After you accept the contact, you can view the customer details and a history of all past interactions with the Contact Center in the left pane, such as the most recent message sent by the customer, whether the customer's browser is still connected to the session, and whether the customer is currently typing a message.

> **Important:**
>
> If Agent Desktop uses the EWC chat solution, when you view the EWC contact history, you see history of the chat session, including any whisper messages sent by the supervisors. If Agent Desktop uses the standard Web Communications chat solution, you can only see the history of the chat session and not the whisper messages sent by the supervisors.

The right pane of the Agent Desktop shows the tools used for Web communications:

- Send the Message — Add the comments from the **Chat** box to the Conversation frame.
- Push the URL — Send a selected URL to the customer's browser.
- Add the selected auto-phrase — Add the selected auto-phrase to the Conversation frame.
- Select the text alignment — Change the alignment of text from left to right to right to left and vice versa.
- E-mail chat log — Select this check box to email a copy of the chat log to the customer.

Procedure
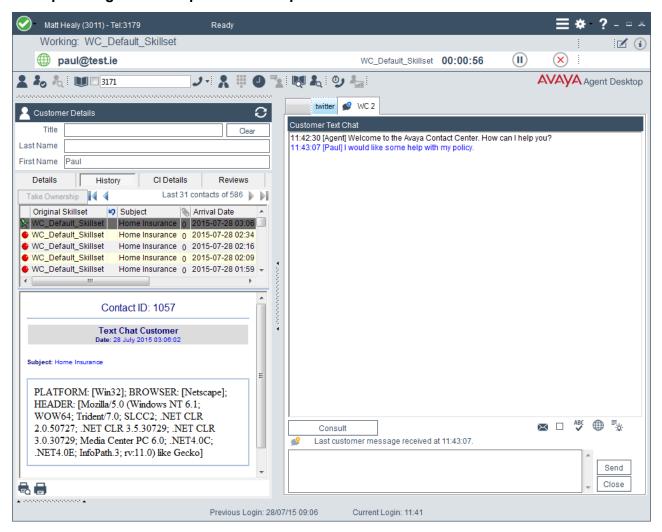
On the work item, click **Accept**.

> ✳ **Note:**
>
> Your site administrator configures the maximum number of additional contacts you can manage.

Example of Agent Desktop with an accepted Web communications contact

Customizing a tab name

About this task

If you have multiple Web communications contacts, you can customize the tab name to identify the received contact.

Procedure

1. On the Agent Desktop right panel, double-click the required tab.

2. Type the *<contact name>*.

Variable definitions

Name	Description
<contact name>	The keyword you use to identify the customer. For example, the first name or the last name.

Declining a Web communications contact

About this task

Decline a Web communications contact when you are not available to chat with a customer and you want to return the contact to the queue.

Procedure

On the work item, click **Reject**.

The contact returns to the queue and into Web-on-hold. Your status is set to Not Ready.

⊛ **Note:**

If two or more Web communications contacts are simultaneously presenting to the agent on Agent Desktop and one Web communications contact is rejected, all contacts are rejected.

Sending a chat message

About this task

Send a chat message to communicate privately with a customer in real time over the Internet.

Procedure

1. Type the message.

2. Click the **Send the Message** icon.

   Your name or agent label appears in the Conversation frame, followed by your message.

   If administrators configure the Friendly Name label, your nickname appears at the beginning of your message.

Adding an auto-phrase to a chat message

About this task

Add an automatic phrase to a chat message when you want to select a commonly-used phrase from a configured list.

Procedure

1. Select the **Add the selected auto-phrase** icon.

2. Select the auto-phrase to use from the list.

   The automatic phrase is added to the **Chat** text box. When the chat message is completed and saved, the automatic phrase is added to the Conversation frame and the text chat log.

Pushing a Web page to a customer

About this task

Push a Web page to a customer's browser, if you decide that a Web page can assist with the contact. Use the Page Push feature to push a Web page. The customer can also push a Web page to your browser.

Page Push has the following limitations:

- Some Web pages do not appear the same when pushed to another person's browser. For example, if you push Web pages that can be personalized to display weather or news, each person sees their own version of the page.

- Dynamic pages that are customized through the use of cookies can appear differently since you and the customer both have separate cookies. Cookies are never shared by you or the customer.

- Framed pages cannot be pushed completely. The URL defining the frameset is pushed, but the individual URLs in each frame are not pushed.

- After a page is pushed, if either you or the customer follows a link to another page, the other person does not see that change.

- If you and the customer both click the **Push the selected web page** icon at approximately the same time, you both see the form that was pushed last. However, both URLs appear in the text chat log.

Procedure

1. Select the **Push the selected web page** icon.

2. Type the URL you want to send.

3. Select the URL to send.

   OR

   Select a predefined URL to send.

The page is pushed to the customer's browser and the URL is added to the Conversation frame and the text chat log.

Performing a Web Communications transfer to a skillset

About this task

You can transfer a Web Communications (WC) contact to a skillset, if your administrator allows.

The agent who answers the transferred contact views all the messages that were previously sent by the customer and the previous agent. The agent can also view the transfer details such as:

- the agent who transferred the contact
- the skillset from which the contact is transferred
- the skillset to which the contact is transferred
- the reason for transferring (if the agent who transferred the contact provides the reason)

⚠ **Important:**

You cannot transfer a contact to a skillset that does not have active agents.

Procedure

1. Click **Consult/Transfer**.

2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.

3. Optionally, enter the reason for transfer under **Transfer Reason**.

   The agent that answers the transferred contact can view the transfer details, including the reason for the transfer.

4. Click **Transfer**.

   Agent Desktop refreshes the list of agents active on the selected skillset and queues the contact to the selected skillset.

Transferring a chat session

About this task

Transfer a chat session to another available agent. You can transfer a chat session only once.

Procedure

1. Click **Consult**.

2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.

3. Click the appropriate agent name.

4. Click **Consult**.

The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the transfer.

⊛ **Note:**

The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Transfer**.

The chat session is now transferred to the other agent and it is no longer displayed on your Agent Desktop. Your status is set to Ready.

Conferencing a chat session

About this task

Conference a chat session to another available agent. You can conference only one agent into a chat session.

Procedure

1. Click **Consult**.

2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.

3. Click the appropriate agent name.

4. Click **Consult**.

The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the conference.

⊛ **Note:**

The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Conference**.

The Consult Text Chat window closes and the original Conversation window reappears. When the agent who was added to the conference begins typing, it is visible to all three participants.

⊛ **Note:**

On Agent Desktop, for the agent who initiated the conference, the **Consult** button is not visible for the entire duration of the Web communications contact. The agent cannot initiate another consult during this period.

6. When you want to leave the conference, click **Close**.

A message appears in the Conversation window that indicates when a participant leaves the conference.

Observing a Web Communications contact

Before you begin

- Ensure that you log on to the Agent Desktop.
- Ensure that you have supervisor/agent privileges.

About this task

A supervisor/agent can observe an agent-customer Web Communications contact. When a supervisor/agent starts observing a Web Communications contact, the agent receives a notification that a supervisor/agent is observing the contact. The agent can continue the conversation without interference from the supervisor/agent. The customer does not receive a notification and is not aware that a supervisor/agent is observing the contact.

If Agent Desktop uses the EWC chat solution then by default, both the customer and the agent is aware that a supervisor/agent is observing the contact.

> ✳ **Note:**
>
> You must log on to the Agent Desktop to observe a Web Communications contact.

When you are observing a contact, only the agent already interacting with the contact can set an activity code for that contact.

Procedure

1. On the Agent Desktop Top bar menu, click **Observe**.

   The Agent Desktop displays the Supervisor Observe window.

2. Under **Filter**, select the **Item** as **Contact Type** with the **Value** as **Webcomms**.

   In the **Contacts** list, the red flag indicates the contacts whose intrinsic values are exceeding the threshold defined by your administrator in the CCMM Administration tool.

3. Click the contact to view the intrinsics for that contact.

   The intrinsics are assigned with priority 1 to 5. Contacts exceeding threshold limits for high priority intrinsics, appear higher in the **Contacts** list.

   > ✳ **Note:**
   >
   > Administrators must configure intrinsic priorities in the CCMM Administration tool.

4. Select a Web Communications contact and click **Observe**.

   The Agent Desktop displays the Customer Text Chat window.

> ⊛ **Note:**
>
> When using the Observe function, you cannot participate in the Web Communications contact. Use the barge-in function to participate in the Web Communications contact. See <u>Barging-in on a Web Communications contact</u> on page 128.

5. If Agent Desktop uses the EWC chat solution, then you can send whisper messages to the agent by typing the messages in the Customer Text Chat window.

   Using whisper messages, you can chat with an agent without the customer seeing the messages sent to the agent.

   Whisper messages are not supported in the Web Communications chat solution.

6. Click **Close** when you finish observing the Web Communications contact.

Barging-in on a Web Communications contact

Before you begin

- Ensure that you have supervisor/agent privileges.
- Ensure that you are observing a Web Communications contact between an agent and a customer.

About this task

A supervisor/agent can participate in an agent-customer Web Communications contact.

You can barge-in on a Web Communications contact only after you have observed that Web Communications contact.

When you barge-in on a contact, only the agent already interacting with the contact can set an activity code for that contact.

If your contact center uses Enterprise Web Chat (EWC), and you barge into a chat where an agent is in conference with another agent, you become the one of the passive agents of the Web Communications contact. This means that the owner of the Web Communications contact is not changed after a supervisor barging-in and you can drop from the chat without immediately contact closing for the agents and the customer. Check with your administrator whether your contact center uses EWC.

Procedure

1. In the Supervisor Observe window, click **Barge-in**, to barge-in on a Web Communications contact you are observing.

   > ⊛ **Note:**
   >
   > The **Barge-in** button for an agent is enabled only after you observe the agent's Web Communications contact. To observe a Web Communications contact, see <u>Observing a Web Communications contact</u> on page 127.

   The Agent Desktop displays the Customer Text Chat window.

2. In the **Text** box, type your message to the customer.

3. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

4. Click **Close** when your conversation is complete.

   The agent-customer Web Communications contact continues until all the agents or the supervisor/agents have left the Web Communications contact or the customer leaves the Web Communications contact.

Ending the Text Chat session

About this task

End the text chat session when the contact is completed. The text chat history is saved automatically and can be printed.

> **✳ Note:**
>
> If Agent Desktop uses the EWC chat solution, after you click **Close** you can return to the chat by clicking **Cancel** on the **Close Contact Details** pane.

Procedure

1. Click **Close**.

2. In the **Notes** box, type additional information about the contact.

3. If Closed Reasons are required, select one of the configured **Closed Reason** codes that best describes the reason you closed your text chat session.

4. Click **Close**.

5. Repeat step 1 to step 4 to close each additional Web communications contact.

Sending the chat log in an email message

About this task

If your Contact Center is licensed for email, you can send a copy of the completed text chat log by email to the customer. If the administrator has configured Contact Center to automatically email chat logs to customers, you cannot manually email the chat log to the customer.

Procedure

Below the Conversation window, select the **Envelop** icon or the check box next to it, to email the chat log to the customer.

Chapter 15: Peer-to-peer Instant Messaging

This section describes how to handle peer-to-peer Instant Messaging (IM) using Avaya Agent Desktop. An agent can exchange peer-to-peer IMs with other agents in the contact center.

You can use the Avaya Agent Desktop Instant Message window to perform the following peer-to-peer tasks:

- Send an instant message
- Reply to an instant message
- Use an auto-phrase
- Use suggested Web pages
- Check the spelling of an instant message
- View personnel using Contacts Presence
- Send an instant message using Contacts Presence
- End an instant message

To perform any task with an agent, select an agent from your contacts list in the **My Contacts** tab or an agent from an Instant Experts group in the **CC Contacts** tab.

Using Contacts Presence you can view all or a subset of the personnel in your Contact Center, according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away). Presence information is provided either by the Microsoft Lync server or Microsoft Skype for Business server. Busy status is available only when using a Microsoft instant messaging server.

Sending a peer-to-peer instant message

About this task

Send a response to an instant message that you accepted.

Procedure

1. In the text box, type your message.

2. Review your messages before you send them by using the scroll bars, if necessary.

3. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

Replying to a peer-to-peer instant message

About this task

Reply to a peer-to-peer instant message that you accepted.

Procedure

1. In the text box, type your message.

2. Review your messages before you send them by using the scroll bars, if necessary.

3. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

Using an auto-phrase

About this task

Use an automatic phrase to add commonly used text to an instant message. The administrator defines automatic phrases using the Contact Center Manager Administration.

Procedure

1. In the Conversation window, click **Suggest Phrase**.

2. Click the automatic phrase to use from the list.

   The automatic phrase is added to the Conversation preview window.

3. Edit the text if necessary.

4. Click **Send**.

Using suggested Web pages

About this task

Use a suggested Web page to add a commonly used Web page URL to an instant message. The administrator defines suggested Web pages using the Contact Center Multimedia Administrator.

Procedure

1. In the Conversation window, click **Suggest Web Page**.

2. Click the Web page you want to use from the list.

   The Web page is added to the Conversation preview window.

3. Click **Send**.

Using spelling checker in an instant message

About this task

Use the spelling checker to check spelling before you send an instant message.

Procedure

1. In the Conversation window, click the **SpellCheck** icon.

2. If the spelling checker highlights a word that is not found in the dictionary, perform one of the following steps:

   - Click **Ignore** to keep the original spelling of the word.
   - Click **Ignore All** to keep the original spelling of all instances of the word.
   - Click **Add** to add the selected word to the dictionary.
   - Click **Replace** to replace the word with the suggested text.
   - Click **Replace All** to replace all instances of the word with the suggested text.
   - Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
   - Click **Cancel** to terminate the spell check.

3. When the spell check is complete, click **Send**.

Viewing personnel using Contacts Presence

About this task

View personnel in your Contact Center using Contacts Presence. You can view all or a subset of the personnel in the Contact Center, according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away).

Contacts presence control has two tabs: **My Contacts** and **CC Contacts**.
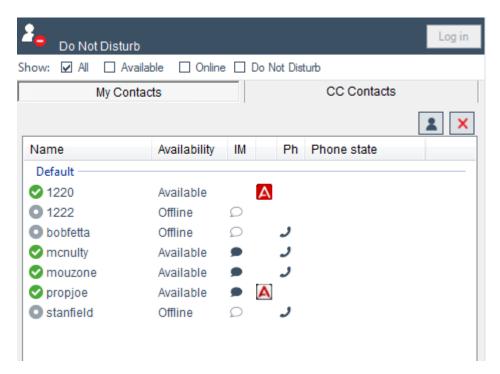
Figure 7: Example of My Contacts tab

The **My Contacts** tab lists contacts that you configure in Microsoft Lync or Microsoft Skype for Business. The **CC Contacts** tab lists the Instant Experts groups that a site administrator configures. Using Contacts Presence you can:

- Send an instant message
- Transfer an instant message
- Consult on an instant message
- Conference an instant message

If a contact in the list is using a Presence/IM client that publishes its phone state, you can also see the agent's phone status whether it is On-hook, Off-hook, or On a call. However, not all supported client software publish the phone state. The agent's phone status is updated only when the agent's state is changed. For example, If an agent's phone status is "On a call", it changes to "On-hook" only after the agent's state is changed to "Available".

✴ **Note:**

Agent Desktop does not publish the phone state of agents. In certain scenarios, where you are using Agent Desktop and a desktop phone, the desktop phone publishes the phone state.

You can view additional information about the other agents, if the agent is using Avaya Agent Desktop. Hovering over the agent's name displays a tool tip containing additional information about the agent such as the contact type the agent is handling, whether the agent is multimedia enabled, and the agent's status (Ready / Not Ready).

The following table shows the My Contacts tab icons.

A site administrator can configure default Instant Experts groups to load automatically after you log on to Agent Desktop. The name of the default Instant Expert groups begin with an underscore, for example, _autoload. Other skillset-associated and keyword-associated Instant Experts groups

appear after you accept an incoming contact or when you click on a highlighted keyword in the text of a chat conversation. The default Instant Experts groups appear first in the list of groups.

⁕ **Note:**

The name of the Instant Expert group, along with the keywords associated to the group, is also highlighted in the text of a chat conversation on Agent Desktop.

After confirming that a contact is available by using Contacts Presence, you can send, consult on, transfer, or conference an instant message to the contact.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.

2. To view your contacts, click the **My Contacts** tab.

3. To view Instant Experts groups, click the **CC Contacts** tab.

Sending an instant message using Contacts Presence

About this task

Send an instant message to a person after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.

2. To send a message to an agent from your list, click the **My Contacts** tab.

   Or

   To send a message to an agent from an Instant Experts group, click the **CC Contacts** tab.

3. Select the name of the person you want to send the instant message to, after confirming that they are available.

4. Click the **Click-to-chat** icon or right-click the name of the person and click **Send an Instant Message**.

   A new Conversation window appears.

5. In the text box, type your message to the agent.

6. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

Ending an instant message

About this task

End an instant message when the contact is complete.

Procedure

Click **Close**.

Chapter 16: Business Continuity

Agent Desktop supports Avaya Contact Center Select Business Continuity for fault tolerant and resilient contact center solutions. In contact centers using Business Continuity, Agent Desktop normally connects to the active Contact Center server. If the active Contact Center server fails or is shut down for maintenance, you can point Agent Desktop at the other Contact Center server and, after a short interval, continue working.

The following procedures describe how to use Agent Desktop in a contact center using Business Continuity.

Handling desktop phone loss of call control

About this task

Normally you use Agent Desktop software to control your desktop phone and to handle customer phone calls. If Agent Desktop is unable to control your desktop phone, do not attempt to use Agent Desktop to handle customer phone calls. When Agent Desktop regains control of your desktop phone, a message box appears to inform you that Agent Desktop can now be used again for telephony operations.

Procedure

1. If Agent Desktop displays a **Please use your phone for telephony operations. A message will appear when AAAD control returns** message box, show the message to your supervisor.

2. On the message box, click **OK**.

3. Do not attempt to use Agent Desktop to handle customer phone calls.

4. When the **AAAD can now be used again for telephony operations** message box appears, click **OK** and use Agent Desktop to handle customer phone calls.

Handling multimedia contact refreshes during a switchover

About this task

Agent Desktop software supports multimedia contacts such as email, web chat, and fax messages. Agent Desktop also supports a licensed multiplicity feature. Multiplicity is the ability to handle multiple concurrent contacts. At any one time you can be active on both a voice and multimedia contact. However, when one contact is active; the others are automatically placed on hold.

If a Contact Center server switchover occurs, all Agent Desktop contacts refresh; they are removed and recreated in Agent Desktop after the switchover. This contact refreshing can take a few seconds, depending on the number of contacts you have open. During the contact refreshing period you cannot use Agent Desktop to handle multimedia contacts. When the contacts have refreshed, the typed contact information is still present. If you were typing an email reply when the switchover occurred, your unfinished email is preserved and you can continue typing from where you were interrupted. You can then continue to handle customer contacts using Agent Desktop as normal.

The Agent Desktop Work Item list does not refresh after a switchover. Any multimedia contact tabs open during the switchover are preserved, but these contacts are not listed on the Work Item list.

During a switchover, if Agent Desktop uses EWC as the web chat solution, EWC has an additional 20 seconds delay, when compared to the Web Communications chat solution. EWC outage on a standalone Multimedia server triggers a switchover to the Standby Multimedia server.

Procedure

1. If Agent Desktop starts to refresh your contacts, do not use Agent Desktop. Stop typing and allow Agent Desktop to completely refresh.

2. When the contacts have fully refreshed, confirm that all your contacts are still open in the multimedia contact tabs and continue handling multimedia and voice contacts using Agent Desktop.

Handling server communication issues

About this task

Agent Desktop connects to multiple Contact Center servers. In the event that the connection to the servers is lost, Agent Desktop repeatedly attempts to reconnect. If you are forced to exit Agent Desktop as a result of server communication issues, all multimedia contacts such as email and Web chats are lost. You can continue to handle phone calls using your desktop phone while server communication is lost.

Procedure

1. If Agent Desktop shows a **CCT Session Disconnected** message box, show the message to your Supervisor.

2. On the message box, click **Dismiss** and continue to handle phone calls using your desktop phone.

3. If Agent Desktop shows a **ACCS Server Error - Unable to connect to the ACCS Server** message box, show the message to your Supervisor.

4. On the message box, select one of the Avaya Contact Center Select (ACCS) servers.

5. Click **Connect**.

6. Agent Desktop continues attempting to reconnect with the ACCS server. On successful reconnect you need to login again.

7. If Agent Desktop repeatedly fails to reconnect with the server, speak with your Supervisor.

Handling configuration issues when launching Agent Desktop

About this task

Agent Desktop is downloaded from and connects to one or more Avaya Contact Center Select servers.

When launched, Agent Desktop attempts to connect to the default server and download the configuration file. In Business Continuity solutions, if Agent Desktop is unable to access the configuration file on the default server it attempts to access the configuration files on the other servers. If Agent Desktop can access the configuration files on another server it displays a message box. The agent can choose to accept the configuration settings for that server or choose to attempt to connect to another server.

Procedure

1. If Agent Desktop displays a **Configuration Settings Error** message box, show the message to your Supervisor.

2. If you wish to accept the configuration settings from the server specified, on the **Configuration Settings Error** message box click **OK**.

3. If you do not wish to accept the configuration settings for the server specified, on the **Configuration Settings Error** message box click **Cancel**.

4. In the **CCMM Server Error** message box a list of available servers is displayed. Choose which server you want to connect to and click **Connect**.

5. If the problem persists, speak with your Supervisor.

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