

Nortel Contact Center

Agent Desktop User Guide

NN44400-114

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New in this release

The following sections detail what is new in the *Nortel Contact Center Agent Desktop User Guide* (NN44400-114).

- Features (page 7)
- Other changes (page 9)

Features

See the following sections for information about feature changes:

- SIP Contact Center (page 7)
- Instant messaging (page 8)
- Viewing personnel using Unified Communications Presence (page 8)
- Customer and contact search (page 9)
- Predictive Outbound (page 9)
- Multiplicity (page 9)
- Communication Control Toolkit (CCT) intrinsics (page 9)

SIP Contact Center

Contact Center Agent Desktop (CCAD) supports the full version of SIP enabled Contact Center and the Express version of SIP Contact Center.

CCAD works with the Microsoft Office Communications Server to handle instant messaging in a SIP enabled Contact Center.

Contact Center (CC) Express does not use an Office Communications Server (OCS). CC Express therefore does not support Unified Communications (UC) Presence. Because Instant Messaging requires presence to work, CCAD in a Contact Center Express solution cannot support Instant Messaging.

SIP Contact Center does not support:

- Blind Transfer
- Emergency Key

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- Transfer or conference DN calls to RoutePoint Address

Contact Center Express does not support:

- Instant messaging
- Viewing personnel using Unified Communications Presence
- Predictive Outbound
- Blind Transfer
- Emergency Key

Instant messaging

Instant messaging (IM) is now available for Agent Desktop users in SIP enabled Contact Centers where an Office Communications Server is part of the solution. You can access online, real-time messaging and accept, decline, send, consult on, conference, or transfer instant messages using Agent Desktop.

Note: Contact Center Express does not support IM.

Viewing personnel using Unified Communications Presence

Use the Unified Communications (UC) Presence feature to view and contact personnel in the contact center. You can group and list personnel by their areas of expertise (for example, Product experts or Service delivery experts) to help determine the best agent to select when consulting on or transferring an instant message. You can also use UC Presence to view and contact external parties using instant messaging. You can determine the availability of a person and then send, consult on, conference, or transfer an instant message to the person.

UC Presence has two tabs, My Contacts and CC Contacts. The My Contacts tab lists agents that you configure. The CC Contacts tab lists Instant Expert groups that a site administrator configures. Only a site administrator can add or remove experts from an Instant Experts group.

With the Instant Experts feature, you have instant access to centrally administered lists of IM-enabled experts and other agents. Instant Experts also offers the following dynamic features:

- automatic display of IM experts groups, for example, always-on contacts
- automatic display of skillset specific expert groups when you accept a contact
- automatic display of keyword-triggered experts when you enter predefined terms in an IM chat

For more information about Instant Experts, see Instant messaging (page 88).

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Note: the Unified Communications (UC) Presence feature is only available in SIP enabled Contact Centers where an Office Communications Server is part of the solution.

Note: Contact Center Express does not support the Unified Communications (UC) Presence feature.

Customer and contact search

Use Enhanced customer and contact search options to search Closed Reason Codes or Agent Login IDs that you can select from a list, or a date or date range when the contact was closed. New buttons accompany multiple-page search results. You can click the Next, Previous, First, or Last arrow buttons to move through pages of search output.

Predictive Outbound

Administrators create Outbound campaigns using the customer database, custom scripts, and Predictive Outbound settings that determine how the calls are presented to agents with Predictive skillsets. Based on how the Administrator configures the campaign, calls can be dialled by the system or by the agent and presented to the agent automatically or with time for the agent to preview the contact.

The Predictive Outbound feature requires additional hardware and software to be purchased and installed with Contact Center 7.0.

Note: Predictive Outbound is not supported in Contact Center Express.

Multiplicity

With the Multiplicity feature, you can manage multiple web communications contact simultaneously with a different contact type, for example, an email contact or a voice contact. You can click the Additional Contact button to accept each additional contact.

Communication Control Toolkit (CCT) intrinsics

After you accept a voice contact, CCT intrinsics allows you to perform the following actions:

- View CCT intrinsics-associated applications
- Start a CCT intrinsic-associated application
- Copy a CCT intrinsic-associated application to the clipboard

Other changes

See the following sections for information about changes that are not feature-related:

- Launching the Agent Desktop (page 10)

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- Entering an activity code (page 10)

Launching the Agent Desktop

Contact Center Agent Desktop deploys using .NET Click Once Deployment. All agents need the new URL for Contact Center Agent Desktop 7.0 to install and launch the Agent Desktop from their client PCs.

Entering an activity code

Agent Desktop now supports text-based activity codes as well as numeric codes. Activity codes defined in Contact Center Manager Server appear on the Activity Code list in Contact Center Agent Desktop. Each Activity Code appears twice in the Activity Code list, once with the numeric value displayed before the text value and once with the text value displayed before the numeric value. As you type the text or numbers to search for an activity code, the type-ahead feature shortens the list of matching characters to help you find the correct activity code.

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Introduction

Contact Center Agent Desktop is a single-interface client application used by contact center agents to interact with customers. Contact Center Agent Desktop agents can respond to customer contacts through a variety of media, including phone, outbound contacts, e-mail, Web communication, and instant messaging. The Contact Center Agent Desktop provides automation for customer responses to eliminate repetitive actions, such as typing a common response in an e-mail message.

Contact Center Agent Desktop uses Microsoft .NET Framework 3.5 Click Once Deployment technology, which means that an agent can install and launch the application by entering a URL address in Windows Explorer or Internet Explorer.

Contact Center Agent Desktop can run with the Agent Desktop Display application, which shows current statistics for the agent who handles contacts. Contact Center supervisors can change the status of a contact or reassign a contact to another agent.

Phone sets and Soft Phones are not supported in SIP-based Contact Centers, including Contact Center Express. Agents must only use the Agent Desktop for call control. Using Phone sets or Soft Phones can cause inaccurate status on the Contact Center Agent Desktop, in real time and in historical statistics.

Prerequisites

- Ensure that you have reviewed the Nortel Contact Center installation procedures.
- Ensure that the following are installed on the client machine:
  - either Windows XP Professional with service pack 2 or Windows Vista
  - Microsoft Internet Explorer 6.0 or later
  - Microsoft .NET Framework 3.5
  - Windows Installer 3.1 Redistributable (v2)
  - Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)

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- Operating your Contact Center Agent Desktop (page 18)
- Telephony (page 27)
- Outbound calls and callbacks (page 39)
- E-mail (page 64)
- Web communications (page 80)
- Instant messaging (page 88)
- Customer and contact details (page 98)

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Contact Center Agent Desktop

Agents use the Contact Center Agent Desktop to handle voice, outbound, e-mail, and instant messaging contacts, depending on the installation and licenses. Use the Contact Center Agent Desktop in the following situations:

- to handle voice contacts when Contact Center Agent Desktop is installed on a Nortel Communication Control Toolkit server
- to handle voice contacts, outbound contacts (voice calls from the contact center to customers), e-mail messages, or Web communications contacts when Agent Desktop is installed on a Nortel Contact Center Multimedia server
- to work with the Microsoft Office Communications Server to handle voice and instant messaging in a SIP-enabled contact center

This chapter also describes the general interface of the Contact Center Agent Desktop application, which comprises two components:

- telephony toolbar
- multimedia toolbar

The Contact Center Agent Desktop also provides a status indicator and a contact timer.

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- Telephony functions of the Contact Center Agent Desktop (page 13)
- Multimedia functions (page 15)

Telephony functions of the Contact Center Agent Desktop

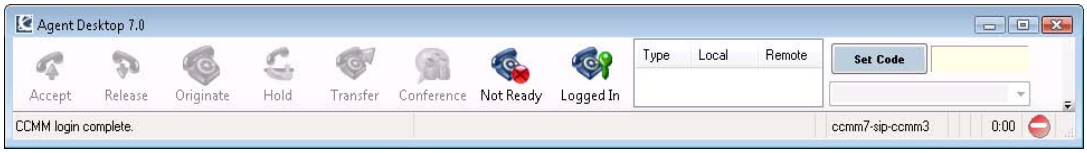
The telephony toolbar contains buttons used to access functions that are similar to the buttons on your telephone:

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Telephony toolbar functions

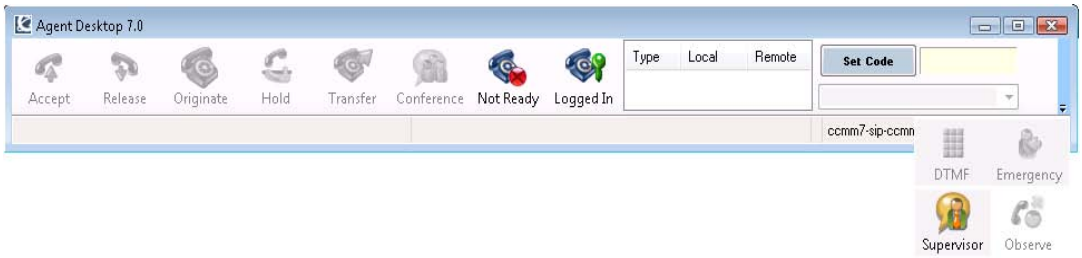
Accept—Accept the new contact.
Release/Reject—Click Release to end the current call. The Reject button appears when a contact is offered to the agent.
Originate—Make a call.
Hold/UnHold—Place a call on Hold. Click UnHold to release the call from Hold.
Transfer—Transfer a call to an agent, skillset, or external party.
Conference—Conference an agent or external party into the current call.
Ready/Not Ready—Change your state from Ready to Not Ready or from Not Ready to Ready.
Logged In/Logged Out—Log on to the Agent Desktop. If you are logged on, you can log off.
Call List—View a list of calls you are currently working on.
Set Activity Code—Enter an activity code to indicate the type of call you are performing. For example, you can have an activity code for sales. Your supervisor or administrator provides the activity codes.
The telephony toolbar shows the Activity Code box based on the configuration of your contact center.
DTMF—Add digits in response to interactive voice requests.
Emergency—Immediately connect with your supervisor in case of an emergency. This is not supported in SIP enabled Contact Centers
Supervisor—Conference your supervisor into your current call.
Observe—Supervisors can listen in to a call between an agent and a customer.

The telephony toolbar by default shows the call list and the Activity Code box.



By default, the DTMF, Emergency, Supervisor, and Observe functions are hidden. Click the overflow toolbar control on the right to expand the toolbar and access these functions.

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Attention: In a SIP-enabled contact center, including Contact Center Express, you must perform all telephony tasks using the Agent Desktop toolbar. Performing telephony tasks using your telephone is not supported.

Attention: In a SIP-enabled contact center, transfer or conference of DN calls to RoutePoint Address is not supported.

Multimedia functions

The multimedia toolbar contains buttons used to create other contact types and access multimedia functions.

The multimedia toolbar is enabled only for agents who have multimedia licensing through the Contact Center Multimedia Server.

Use the toggle bar in the bottom left corner of the telephony toolbar to access the multimedia functions.



Multimedia toolbar functions

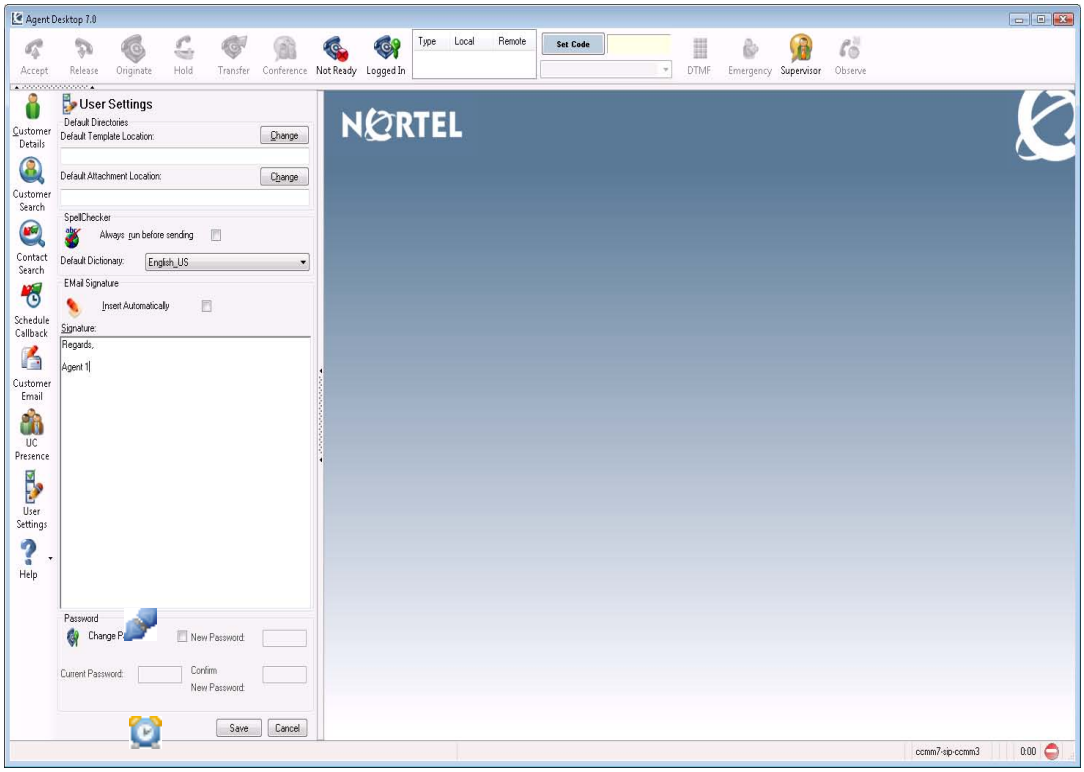
Customer Details—Review and edit the information about a customer.
Customer Search—Search for customers in the Multimedia database.
Contact Search—Search for contacts in the Multimedia database.
Schedule Callback—Create a future outbound call to a customer.
Customer E-mail—Create an outgoing e-mail message to a new or existing customer.
User Settings—Configure user settings such as the default location for e-mail attachments, the default location for user templates, the spelling dictionary, the agent signatures and password changes.

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Multimedia toolbar functions (continued)

	UC Presence—Access UC Presence feature. This feature is not supported in Contact Center Express.
	Help—Get help for the current window. Access Contact Center Agent Desktop About information.

The multimedia window shows the information related to the items selected on the toolbar. For example, for user settings, the following window appears.



During a Web communications contact, the following indicators can appear.

Web communications icons

	A contact disconnects.
	Indicates, in a text chat, that a contact sends the last message that is older than 30 seconds.

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Web communications icons (continued)

	Indicates, in a text chat, that a contact sends the last message that is less than 30 seconds old. Indicates, in a text chat, that an agent sends the last message that is older than 60 seconds.

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Operating your Contact Center Agent Desktop

Use the Contact Center Agent Desktop to handle voice contacts, or voice, outbound, e-mail, Web communications, and instant messaging contacts, depending on the installation and licenses. This chapter describes the functionality of the Contact Center Agent Desktop in the following situations:

- Handle voice contacts when Contact Center Agent Desktop is installed on a Nortel Communication Control Toolkit server.
- Handle voice contacts, outbound contacts (voice calls from the contact center to customers), e-mail messages, or Web communications contacts when Agent Desktop is installed on a Nortel Contact Center Multimedia server.
- Work in a SIP-enabled contact center, to handle voice and instant messaging.

Using the Contact Center Multimedia Administrator, the administrator can configure the Agent Desktop to give visual and audible alerts when a contact is presented.

- Audible Alert: The Agent Desktop emits a beep.
- Bring to Front: The Agent Desktop comes to the front of the desktop to cover all current windows.
- Give Focus: The Agent Desktop window is given focus so that all actions in other windows are stopped.

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- Launching the Agent Desktop (page 19)
- Creating a shortcut to the Agent Desktop (page 20)
- Logging on to the Agent Desktop of a Voice and Multimedia Contact Center (page 21)

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- Logging on to the Agent Desktop of a SIP-enabled Contact Center (page 22)
- Changing your password (page 23)
- Changing your status to Ready (page 24)
- Changing your status to Not Ready (page 25)
- Accessing online help (page 25)
- Logging off of the Agent Desktop (page 26)

Installing the Agent Desktop

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

Prerequisites

- Ensure that the administrator has configured your Windows User ID in CCT and that you have a valid User ID, Password, and Domain for use with Contact Center Agent Desktop.

Procedure steps

Step	Action
1	In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator. The correct URL format is <Contact Center Multimedia servername>/agentdesktop.
2	Click **Launch CCAD**.
3	Click **Install**.

--End--

Launching the Agent Desktop

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

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If you are logging on to the Agent Desktop to handle Predictive Outbound contacts, there can be a delay to log in to all of the required applications. If the delay occurs after the agent logs on to Contact Center Manager Server or Contact Center Multimedia, and before logging on to the SER software, ensure that CPSEE Application server name is in host file of the client machine.

Prerequisites

- Ensure that you have installed Contact Center Agent Desktop. See Installing the Agent Desktop (page 19).
- Ensure that the administrator has configured your Windows User ID in CCT and that you have a valid User ID, Password, and Domain for use with Contact Center Agent Desktop.

Procedure steps

Step	Action
1	In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator. The correct URL format is <Contact Center Multimedia servername>/agentdesktop.
2	Click **Launch CCAD**.
3	Click Windows **Start**, **All Programs**, **Nortel**, **Nortel Contact Center Agent Desktop**. *The Agent Desktop toolbar appears. If a CCT Connection Failure message appears, your Windows User ID has not been configured on CCT. Click Retry to enter valid User Credentials or click Cancel to exit the application.*

--End--

Creating a shortcut to the Agent Desktop

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

Prerequisites

- Ensure that you have installed Contact Center Agent Desktop. See Installing the Agent Desktop (page 19).

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Procedure steps

Step	Action
1	Click **Start, All Programs, Nortel**.
2	Right-click **Contact Center Agent Desktop**.
3	Select **Send To, Desktop (create shortcut)**.

--End--

Logging on to the Agent Desktop of a Voice and Multimedia Contact Center

Log on to the Agent Desktop after you start the Contact Center Agent Desktop application. 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 (for example, voice, outbound, e-mail or Web communications contacts). If you are assigned to a skillset for a particular media, you can receive and create contacts in that media.

Procedure steps

Step	Action
1	Launch the Contact Center Agent Desktop.
2	If you have Hot Desking enabled, enter your workstation name when prompted.
3	On the Agent Desktop telephony toolbar, click **Logged Out**. One of the following occurs, depending on which type of agent you are: • If you are an agent who handles e-mail messages or outbound calls, the **Enter Login details** window appears. Enter your **ID** and **Password**. • If you handle voice contacts only, a logon prompt does not appear. Your logon ID is automatically filled in based on the Communication Control Toolkit implementation for your contact center. The system verifies your logon ID and automatically logs you on to the Agent Desktop application. *The Logged Out button changes to Logged In.*

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--End--

Variable definitions

Description	Value
ID	Your logon ID appears in the ID box, based on the Communication Control Toolkit implementation for your contact center.
Password	Initially, for multimedia agents, your password is the same as your Agent Logon ID. You must change your password using the steps in Changing your password (page 23). The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In

Logging on to the Agent Desktop of a SIP-enabled Contact Center

Log on to the Agent Desktop after you start the Contact Center Agent Desktop application. 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 (for example, voice, outbound, e-mail or instant messaging contacts). If you are assigned to a skillset for a particular media, you can receive and create contacts in that media.

Procedure steps

Step	Action
1	Launch the Contact Center Agent Desktop.
2	On the Agent Desktop telephony toolbar, click **Logged Out**.
3	In the **Enter Login details** window, perform one of the following tasks:

Attention: This step does not apply in Contact Center Express solutions.

- If your user profile is configured in Office Communicator (OC) and OC is installed on the PC running Agent Desktop, ensure that the information in the **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP** fields is correct.

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- If your user profile is saved locally on the PC running Agent Desktop, click **Load saved profile**.
- If you are creating a new user profile, enter your **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP**, and then click **Save this profile**.

4 Click **OK**.

5 If an OC client is running on the PC running Agent Desktop, a warning message appears. Click **Yes** to close the OC client.

--End--

Variable definitions

Description	Value
Sign-in name	Username (for example, agent5001).
Password	Password for Username.
Domain	The Windows domain in which the Username and Password are configured in Active Directory.
Uri	The SIP URI of the Windows user (for example, sip:AgentID@mydomain.com or Username@company.com).
Server name or IP	The Fully Qualified Domain Name (FQDN) of the Office Communications Server in the Domain (for example, OCS_Server.mydomain.com).

Changing your password

Change your password from the default password if you are an agent who handles multimedia contacts. The default password is the same as your Agent Logon ID.

If you forget your password, contact your administrator who can reset your password on the Contact Center Multimedia server.

Prerequisites

- Close all open contacts.

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Procedure steps

Step	Action
1	If the multimedia component does not appear, click the icon under **Accept** on the telephony toolbar.
2	On the **Multimedia** toolbar, click **User Settings**.
3	Select **Change Password**.
4	In the **Current Password** box, type your current password.
5	In the **New Password** box, type your new password. Your new password cannot be the same as your Agent Logon ID.
6	In the **Confirm Password** box, retype your new password.
7	Click **Save**.

--End--

Changing your status to Ready

Change your status to Ready when you are available to create or receive contacts depending on your assigned skillsets.

When you change your status to Ready in a SIP-enabled contact center, your UC Presence status automatically changes to Available.

Procedure steps

Step	Action
1	Click **Not Ready**. *The system places you in **Ready** status. The **Not Ready** button changes to **Ready**.*

--End--

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Changing your status to Not Ready

Change your status to Not Ready when you can create new contacts, but cannot receive them. If your administrator configured Not Ready reasons, you must select a reason when you change your status to Not Ready.

When you change your status to Not Ready in a SIP-enabled contact center, your UC Presence status automatically changes to Do Not Disturb.

Your supervisor or administrator provides the activity codes for the Not Ready reasons. The activity codes defined in Contact Center Management Server appear in the Contact Center Agent Desktop list. Alphanumeric codes are available.

Procedure steps

Step	Action
1	Click **Ready**. *The system places you in **Not Ready** status. The **Ready** button changes to **Not Ready**.*

--End--

Accessing online help

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

Note: Pressing the F1 key will launch the online help.

Procedure steps

Step	Action
1	Expand the Multimedia toolbar.
2	In the window for which you want to see help, click the Help icon in the Toolbar.

--End--

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Logging off of the Agent Desktop

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

If you close the Agent Desktop without logging off, a warning message appears asking you to confirm that you want to close the Agent Desktop and log off.

Prerequisites

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

Procedure steps

Step	Action
1	On the telephony toolbar, click **Logged in**.
	--End--

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Telephony

This chapter describes how to handle incoming telephone calls from customers in Contact Center Agent Desktop.

You can use the Contact Center Agent Desktop to perform the following telephone tasks:

- Accept and decline incoming contacts.
- Enter an activity code.
- Place and release a call on hold.
- Transfer a call to another party.
- Conference a call.
- Make a call.
- End a call.
- Call a supervisor.
- Handle an emergency.

Although you can use your telephone to perform certain functions, Nortel recommends that you use the Agent Desktop toolbar to perform all telephony functions, such as logging on or off, changing your ready status, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

Do not perform any of the preceding telephony tasks by using a mixture of steps on your telephone and the telephony toolbar. For example, do not place a call on hold using your telephone and then retrieve the call by clicking Unhold on the toolbar.

Attention: In a SIP-enabled contact center, including Contact Center Express, you must perform all telephony tasks using the Agent Desktop toolbar. Performing telephony tasks using your telephone is not supported.

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Attention: In a SIP-enabled contact center, transfer or conference of DN calls to RoutePoint Address is not supported.

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- Using the Emergency key (page 35)
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- Barging in on a call (page 37)

Accepting a call

Accept and work with telephone calls by using the telephony toolbar in the Agent Desktop interface. When you accept an incoming contact, you connect to that contact. The relevant telephony toolbar icons become active and the call timer appears in the status bar.

If your administrator configured your call center to run in Force Call mode, you must handle all contacts presented to you.

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset designated for handling telephone calls.

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Procedure steps

Step	Action
1	From the Agent Desktop application, click **Accept**.
	--End--

Declining a call

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.

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset designated for handling telephone calls.

Procedure steps

Step	Action
1	From the Agent Desktop application, click **Reject**.
	--End--

Entering an activity code

Enter one or more activity codes during your calls by using the telephony toolbar. Activity codes provide a method to track the time that agents spend on various types of calls. For example, you can use an activity code to track sales calls by entering that activity code in the Agent Desktop during sales-related calls.

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Activity codes are also used to enter Not Ready reasons. You can select Activity Codes when you are on a contact. You can select Not Ready codes when your status is Not Ready.

Your supervisor or system administrator provides Activity codes. You can use alphanumeric codes. Activity codes that are defined in Contact Center Management Server appear on the Contact Center Agent Desktop list. If a new activity code is added while you are logged on to the Agent Desktop, you must log off the Agent Desktop and log back on before you can select the new code from the list.

The Activity Code box appears on the telephony toolbar, based on your contact center configuration. For example, if you can handle voice contacts only, the Activity Code list is not populated.

Procedure steps

Step	Action
1	In the **Activity Code** box on the telephony toolbar, enter a code to indicate the activity of the call.

--End--

Placing a call on hold

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 Hold button flashes orange when a call is on hold.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Hold**. *The call is placed on hold, the status bar color changes to orange, and the Hold button changes to Unhold and starts flashing.*

--End--

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Releasing a call on hold

Release a call that you placed on hold when you want to speak to the caller again.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Unhold**. *The call is taken off hold, the status bar color changes to green, and the **Unhold** button changes to **Hold**.*
	--End--

Transferring a call

You can transfer a call to another agent in your contact center. You can perform a supervised transfer or a blind transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before completing the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Transfer**.
2	In the **Transfer** window, select **Blind Transfer** or **Supervised Transfer**.
3	In the **Number to Transfer** box, type the number to which you want to transfer the call. *If you select **Supervised Transfer,** the active call is placed on hold and a call is placed to the third party. While you speak with the third party, the Transfer and Hold buttons both flash to indicate that you have a customer on hold and that you must complete the transfer.*
4	Click **OK**. *The call is transferred to the third party and is dropped from your telephone. The call timer stops and the status bar color changes to yellow indicating that you are available to take another call.*

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Attention: If you are transferring a call to a voicemail system, you must ensure that you select the outgoing call, and not the call you received on the CCAD call list to ensure that the correct DTMF tones are transferred to the voicemail system.

Attention: Blind Transfer is not supported in SIP-enabled Contact Centers, including Contact Center Express. However you can complete the transfer before the third party answers the call.

Attention: In a SIP-enabled contact center, transfer or conference of DN calls to RoutePoint Address is not supported.

--End--

Conferencing in another agent

Conference in another agent if you want to speak to your customer and another agent from the contact center.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Conference** to place the customer on hold and open the Conference window.
2	In the Conference window, in the **Number** box, type the number of the agent to conference into the call.
3	Click **OK** 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.

Attention: In a SIP-enabled contact center, transfer or conference of DN calls to RoutePoint Address is not supported.

--End--

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Conferencing in a supervisor

Conference in a supervisor if you want to speak to your customer and your contact center supervisor.

Procedure steps

Step	Action
1	On the telephony toolbar, 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 **Supervisor** again to take the customer off hold and conference in the customer and your supervisor.

--End--

Ending a call

End a call when a call is completed. If you were in Ready status before the call, you automatically return to Ready when you terminate the call. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready and enter a Not Ready Reason Code in the Code field of the telephony toolbar. The Activity Code box for entering the Not Ready Reason Code appears on the telephony toolbar, based on your contact center configuration.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Release**.

--End--

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Calling your supervisor

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

To call a supervisor when you are on a call, see Conferencing in a supervisor (page 33).

Procedure steps

Step	Action
1	On the telephony toolbar, click **Supervisor**.
	--End--

Making a call

Make a call using the Contact Center Agent Desktop. Ensure that you follow the correct 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 steps

Step	Action
1	On the telephony toolbar, click **Originate**.
2	In the **Enter Destination** dialog box, to dial the default phone number, click **OK**. **OR** Type an external phone number in the **Destination Number** box. If necessary, type the number required to access an external line in the **Trunk Access Code** box. Ensure the **Use** check box is checked, and then click **OK**. **OR** Type an internal phone number in the **Destination Number** box. Ensure the **Use** check box is cleared, and then click **OK**.
3	Click **Release** when you complete the call.
4	If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.

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--End--

Using DTMF digits

Use the Dual-tone Multifrequency feature (DTMF) if, during a call, you must navigate through a call center menu or dial numbers to access voice messages.

Procedure steps

Step	Action
1	On the telephony toolbar, click your pointer on the arrow on the right side of the toolbar.
2	Enter the numbers on the keypad that appears.

--End--

Using the Emergency key

Use the Emergency key if you require immediate assistance from your contact center supervisor while handling a call. For example, if you talk to a customer who suddenly threatens you, you may want to add your supervisor to the call immediately. The caller is not placed on hold when the supervisor is conferenced in an emergency.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Emergency**. *Your supervisor is added to the call immediately and conferenced in with both you and the customer.*

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Attention: Emergency key is not supported in SIP-enabled contact centers, including Contact Center Express.

--End--

Observing a call

Observe a call when a supervisor or agent-supervisor wants to listen in on a call. In a SIP-enabled contact center, both the observe and barge-in functions can be used to listen in on a call. When using the observe function, the supervisor or agent-supervisor can listen to a call without being heard. When using the barge-in function, the supervisor or agent-supervisor can participate in a call between the agent and the customer.

The agent or customer on the contact center call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

An agent-supervisor can handle calls and be a supervisor to other agents. Only one supervisor at a time can observe a call, and the supervisor can observe only one call at a time.

Prerequisites

- Ensure that your contact center is SIP-enabled.
- Ensure that you log on to the Contact Center Agent Desktop.
- Ensure that you have either supervisor or agent-supervisor privileges.

Procedure steps

Step	Action
1	Click the blue arrow on the right side of the telephony toolbar to expand the toolbar.
2	Click **Observe**. *In the **Assigned Agents** box, the green circle indicates the assigned agents that are ready to receive calls, and the red circle indicates the assigned agents that are not ready to receive calls*

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3	In the **Supervisor Control** dialog box, under **Current Agent Contacts**, select the call that you want to observe.
4	Click **Observe**. *A new call is presented on the Agent Desktop of the Supervisor. The new call is not a contact center call, so the agent does not need to be ready. The call connects the Supervisor or Agent-Supervisor to the selected Agent call.*
5	Accept the call ringing on your Agent Desktop.

--End--

Barging in on a call

Barge in on a call if you are observing a call that needs immediate supervisor attention. When using the barge-in function, the supervisor or agent-supervisor can participate in a call between the agent and the customer.

The agent or customer on the contact center call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

Procedure steps

Step	Action
1	In the **Supervisor Control** dialog box, click **Barge-In**.

--End--

Ending your observation

End your observation when you no longer need to observe the agent and customer conversation. The agent and the customer on the contact center call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

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Procedure steps

Step	Action
1	On the Agent Desktop telephony toolbar, click **Release**.
	--End--

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Outbound calls and callbacks

This chapter describes how to handle outbound calls and callbacks.

Outbound campaigns are created by the campaign administrator. When a campaign is running, 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 for you 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 autodial, the system automatically places the call for you after a predetermined number of seconds.

You use the Agent Desktop interface to handle an outbound call:

- Accept the incoming contact.
- Review and update customer information.
- Follow a script.
- Assign a disposition code.

You can also use the 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 Web site. From the Web site, 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 on the Multimedia toolbar. 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.

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

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- Accepting an outbound contact (page 40)
- Declining an outbound contact (page 41)
- Placing an outbound call (page 41)
- Using a script (page 42)
- Recording the result (page 43)
- Ending the call (page 44)
- Scheduling a callback (page 44)
- Calling the customer (page 45)

Accepting an outbound contact

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

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

By using the Contact Center Multimedia Administrator, an administrator can configure the Agent Desktop to give visual and audible alerts when a contact is presented. The *Contact Center Multimedia Server Administration Guide* describes how to enable or disable these features.

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset for handling outbound contacts.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Accept**. *When you accept an incoming contact, you connect to the customer. The Agent Desktop expands to show the customer details and the defined script*

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for the call, the call is dialed according to the settings in the outbound campaign, and the call timer appears on the status bar.

--End--

Declining an outbound contact

You can decline an outbound contact if you are unavailable to accept a call. Change your status to Not Ready if you are unavailable to handle contacts.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Reject.**

--End--

Placing an outbound call

Place an outbound call by accepting or opening an outbound contact. You can then review the customer details and outbound contact script. Your outbound administrator can configure the 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 any applicable notes, and save the call results.

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Prerequisites

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

Procedure steps

Step	Action
1	On the telephony toolbar, click **Originate**.
2	In the **Enter Destination** window, click **OK** to dial the default customer telephone number.
3	If you can speak with the customer, proceed with the call by using a script, if applicable.
4	If you cannot speak with the customer, record the result of the call to update the contact with the appropriate disposition code, reschedule the call, and add any applicable notes.
5	Verify the customer information and update any customer contact fields required.

--End--

Using a script

Use a script if the campaign administrator assigned an agent script to the outbound campaign. The content of your 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 with the customer, you can record your answers or comments directly on the Script Questions tab. The customer responses are saved automatically.

Attention: If the campaign administrator did not assign an agent script to the outbound campaign, the Script Questions tab does not appear.

Procedure steps

Step	Action
1	On the telephony toolbar, click the **Script Questions** tab.

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2	Read the introduction to the customer.
3	Read each question in the script to the customer.
4	Record the customer responses by using one of the three methods defined on the **Script Questions** 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 to select the appropriate response. • Select an option. • Type the customer comments in a text box.
5	To disconnect from the call, click **Release**.

--End--

Recording the result

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 in 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 the customer requested a callback, you can schedule a callback.

Procedure steps

Step	Action
1	Click the **Disposition codes** tab.
2	Select the disposition code that most accurately reflects the result of your call.

--End--

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Ending the call

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

If the disposition code is configured to do so, the script questions and answers are saved in the multimedia database. 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 steps

Step	Action
1	Click **Finish**.
	--End--

Scheduling a callback

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 e-mail message or telephone request from a customer. A scheduled callback outbound contact is not pegged against an outbound campaign.

Prerequisites

- Ensure that you are not working on another contact.
- Ensure that your telephony toolbar is open.

Procedure steps

Step	Action
1	Open the Multimedia toolbar.
2	Click **Schedule Callback**.
3	In the **Schedule Callback** window, select a skillset from the list to direct the contact to the most appropriate agent skills.
4	Select either an active agent for the call, or choose a specific agent from a list of all agents.

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5	In the **Subject** box, type a subject for the callback.
6	In the **Time** box, select the time to perform the callback.
7	In the **Date** box, select the date to perform the callback.
8	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.
9	Click **Send**. *The scheduled callback is entered into the database, ready to be routed when the selected date and time occurs.*

--End--

Calling the customer

Call a customer when you need to manually place a call. With an outbound campaign contact, your administrator can configure the call to be automatically dialed when you accept the contact. A scheduled callback contact cannot be configured to be dialed automatically. You must manually place the call after you review the contact information.

Prerequisites

- Ensure that you are assigned to an outbound skillset.

Procedure steps

Step	Action
1	When the contact is presented to your desktop, click **Accept**.
2	On the telephony toolbar, click **Originate**.
3	In the Enter Destination dialog box, click **OK** 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**.

--End--

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Predictive Outbound

This chapter describes how to handle Predictive Outbound contacts in Contact Center Agent Desktop.

Administrators create Outbound campaigns using the customer database, customized scripts, and Predictive Outbound settings that determine how the calls are presented to agents with Predictive skillsets. Based on how the Administrator configures the campaign, calls can be dialled by the system or by the agent and presented to the agent automatically or with time for the agent to preview the contact.

The Predictive Outbound feature requires additional hardware and software to be purchased and installed with Contact Center 7.0.

You can use the Predictive Outbound features to perform the following telephone tasks:

- Accept incoming contacts.
- Cancel incoming contacts.
- Place a call on hold.
- Transfer a call to another party.
- Conference a call.
- End a call.
- Schedule a callback.

There are five dialing options in Predictive Outbound for delivering contacts to the Contact Center Agent Desktop. The dialing option used is determined by the Administrator during configuration of the campaign that is routing the contact to the Agent Desktop. The five dialing options are:

- **Predictive**: Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer receives the call simultaneously. The agent cannot cancel the contact or dial the number.

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- **Paced**: Contact Center presents a record to the agent for review while the customer is being dialed. The agent cannot cancel the contact or dial the number.
- **Preview**: Contact Center presents a record to the agent for review. After a configured period of time passes, the system dials the default number for the customer. Before this period of time passes, the agent can cancel the contact or dial the number manually.
- **Progressive**: Similar to the Predictive dialing option, Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer receives the call simultaneously. The agent cannot cancel the contact or dial the number. Unlike the Predictive dialing option, Contact Center prevents the number of calls in progress from exceeding the number of Idle agents.
- **Manual**: Contact Center presents a record to the agent for review. No time limit is given. The agent can cancel the contact or dial the number manually and the call is completed using the CS 1000 switch. This dialing option is manual.

Attention: Do not perform any of the preceding telephony tasks by using a mixture of steps on your telephone and the telephony toolbar. For example, do not place a call on hold using your telephone and then retrieve the call by clicking Unhold on the toolbar.

Attention: Predictive Outbound is not supported in Contact Center Express.

Prerequisites for Predictive Outbound

- Your Contact Center must have the hardware and software required to configure and use the Predictive Outbound feature.
- You must have configured agents with Predictive skillsets.

Navigation

- Changing to Ready status (page 48)
- Changing to Not Ready status (page 50)
- Changing to Not Ready status when on a contact (page 50)
- Handling a Predictive or Progressive call (page 51)
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- Transferring a call (page 54)
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- Originating a call (page 59)
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- Handling a Standard callback call (page 62)

Changing to Ready status

Change to Ready status after logging in to Agent Desktop or any time when you are ready to accept contacts.

Procedure steps

Step	Action
1	From the Agent Desktop application, click **Not Ready**. *The agent status changes to Ready.*
	--End--

Procedure job aid

Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Not Ready	The agent cannot receive any contacts. This is the initial status following agent login.	Click Ready. Log off Agent Desktop.
Ready	The agent can receive a contact.	Click Not Ready. Log off Agent Desktop.
Talking	The agent is connected to a contact.	Click Transfer, Conference, Hold, Consult, Not Ready (pending), Callback, Disposition, or Hangup.
Preview	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.

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Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Preview(Paced)	The agent has received a contact on the Agent Desktop and is previewing the contact before the system automatically connects the call.	None.
Preview(Manual)	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.
Preview Callback	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.
Preview Callback(Manual)	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.
Wrapup	This status appears if: - the agent hangs up on the contact - the contact hangs up on the agent - the DN disconnects	Click Disposition, Originate, Callback, Not Ready (pending), or Hangup (if a secondary call is connected).
TalkCustomerHold	The agent is consulting with another agent while the customer is on hold.	Click Hangup, Callback, Not Ready (pending), Transfer, or Conference.
Voice Only	The agent is being consulted.	Click Hangup or Hold.
Conferenced(Owner)	The agent is consulting with another agent and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).
Conferenced(Passive)	The agent is being consulted by another agent and a customer.	Click Hangup or Hold.
ConferencedExt(Owner	The agent is consulting with an external party outside the contact center and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).

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Changing to Not Ready status

Change to Not Ready status to indicate that you are not ready to accept contacts.

Prerequisites

- Ensure that you have no active contact.

Procedure steps

Step	Action
1	From the Agent Desktop application, click **Ready**. *The agent status changes to Not Ready.*

--End--

Changing to Not Ready status when on a contact

Change to Not Ready status when still on a contact to indicate that you will not be ready to accept contacts when the current contact is completed.

Prerequisites

- Ensure that you have an active contact.

Procedure steps

Step	Action
1	From the Agent Desktop application, click **Ready**. *The button changes to Not Ready. However, the agent status change remains pending and does not change to Not Ready until the current contact ends.*

--End--

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Handling a Predictive or Progressive call

Handling a Predictive or Progressive call involves the same procedure for the agent. However, the Administrator can use Progressive calls to prevent the system from dialing calls that exceed the number of Idle agents.

Predictive and Progressive calls are delivered to your Agent Desktop automatically. The customer is on the line and the Customer Details and call script appear on your Agent Desktop.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Respond to the call when it is presented to you. *Your agent status is Talking.*
	--End--

Handling a Paced call

Handling a Paced call enables you to preview a call while it is being dialed by the system. You cannot cancel the call or dial the customer’s phone number.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appear on the Agent Desktop. *Your agent status is Preview(Paced).*
2	Respond to the call when it is presented to you. *Your agent status is Talking.*

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--End--

Handling a Preview call

Handling a Preview call enables you to preview a call before you or the system dials the customer's phone number. You are given a predefined time period to preview the contact. Before this time period expires, you can Dial the customer's phone number or Cancel the contact. When the Preview time period expires, the system dials the customer and presents the call to you.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appears on the Agent Desktop. *Your agent status is Preview. The Preview time period begins to time down and the Time Remaining is displayed in the Preview Contact dialog box.*
2	Choose one of the following actions: • Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer. • Click **Cancel** to cancel the contact. • Respond to the call when the Preview time period expires and the system automatically presents the call to you. *If you or the system dials the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.*

--End--

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Handling a Manual call

Handle a Manual call using a procedure similar to handling a Preview call. However, a Manual call is handled through the CS 1000 switch and not through the Predictive Outbound features.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appears on the Agent Desktop. *Your agent status is Preview(Manual).*
2	Choose one of the following actions: • Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer. • Click **Cancel** to cancel the contact. *If you dial the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.*

--End--

Cancelling a call

Cancel a call if you want to reject a contact and place the contact back in the queue.

You can cancel only Preview or Manual Predictive Outbound calls.

Prerequisites

- Ensure that you are in Ready status.
- Ensure that you have a Predictive skillset designated for handling telephone calls.

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Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appears on the Agent Desktop. *Your agent status is Preview or Preview(Manual).*
2	In the **Preview Contact** dialog box, click **Cancel**. *The contact is returned to the queue.*
	--End--

Transferring a call

You can transfer a call to another agent in your contact center. Transferring a call involves several steps, particularly if the agent to whom you want to transfer a call is not in Ready status when the initial request is made. When you select an Agent (or Skillset, Work Session, or Phone) and click Consult, a request to connect to the agent is generated. Following the request, one of the following occurs.

- If the requested agent is not logged in, the Consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click Close to cancel the request.
- If the requested agent is logged in, but not in Ready status, the request continues for 60 seconds. If the agent becomes available during this time, the consult is routed to the agent, the customer is placed on Hold, and both agents have a voice connection. The originating agent's status is TalkCustomerHold. The consulted agent's status is VoiceOnly. The originating agent can complete the transfer by clicking the Transfer button. The originating agent's status is Ready. The consulted agent's status is Talking.
- If the requested agent is logged in, but not in Ready status, and does not become available after 60 seconds, the request times out. The originating agent can try to transfer the call to another agent or can click Close to cancel the request.
- At any time while the request is being made, the originating agent can click Cancel to cancel the request. All other buttons on the Transfer dialog box are disabled while the request is being made.

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An agent with predictive outbound skillsets can encounter the following scenarios during a call transfer:

- If an agent uses SER to perform a supervised transfer to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent must not complete the transfer if there is a busy signal. The agent must confirm that the third party is available before a transfer completion.
- If an agent uses SER to perform a blind transfer to an invalid or busy phone number, the agent hears no indication that the third party is unavailable. To avoid a call disconnect, the agent must confirm that the third party is available before the transfer attempt.

Prerequisites

- Ensure that the agent to which you want to transfer a call has a Predictive skillset and they are in Ready status.

Procedure steps

Step	Action
1	On the Agent Desktop toolbar, click **Transfer**.
2	In the Transfer dialog box, select whether you want to transfer the call by **Skillset**, **Agent**, **Work Session**, or **Phone** number, and then select the party to whom you want to transfer the call from the updated list of available options. **OR** Type a phone number in the **Number to Dial** field.

Attention: In manual mode, if you press the Transfer/Conference buttons on the phone, the Transfer/Conference dialog box will not appear on CCAD as it does for other modes of predictive outbound.

3	Click **Consult**. *If the requested agent is available, Consult changes to Transfer. A voice connection is established between the originating agent and the consulted agent. The customer is placed on Hold. The originating agent's status is TalkCustomerHold. The consulted agent's status is VoiceOnly.*
4	Speak to the consulted agent and provide any information needed before completing the transfer.
5	Click **Transfer**. *The transfer is completed. If the call is transferred to another agent, the originating agent is in Ready status and the consulted agent is in Talking status. If the call is transferred to an external party, the originating agent is in Wrapup status.*

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Attention: In a SIP Contact Center transfer or conference of DN calls to RoutePoint Address is not supported.

--End--

Conferencing in another agent

You can conference in another agent in your contact center. Conferencing in another agent involves several steps, particularly if the agent you want to conference in is not in Ready status when the initial request is made. When you select an Agent (or Skillset, Work Session, or Phone) and click Consult, a request to connect to the agent is generated. Following the request, one of the following occurs.

- If the requested agent is not logged in, the Consult attempt fails immediately. The originating agent can try to conference in another agent or can click Close to cancel the request.
- If the requested agent is logged in, but not in Ready status, the request continues for 60 seconds. If the agent becomes available during this time, the consult is routed to the agent, the customer is placed on Hold, and both agents have a voice connection. The originating agent's status is TalkCustomerHold. The consulted agent's status is VoiceOnly. The originating agent can add the customer to the call and begin the conference by clicking the Conference button. The originating agent's status is Talking. The consulted agent's status is Talking.
- If the requested agent is logged in, but not in Ready status, and does not become available after 60 seconds, the request times out. The originating agent can try to conference in another agent or can click Close to cancel the request.
- At any time while the request is being made, the originating agent can click Cancel to cancel the request. All other buttons on the Conference dialog box are disabled while the request is being made.

If an agent with predictive outbound skillsets uses SER to initiate a conference call to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent must not complete a conference call if there is a busy signal. The agent must confirm that the third party is available before completing a conference call.

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Prerequisites

- Ensure that the agent you want to conference in has a Predictive skillset and they are in Ready status.

Procedure steps

Step	Action
1	On the Agent Desktop toolbar, click **Conference**.
2	In the Conference dialog box, select whether you want to conference to an agent by **Skillset**, **Agent**, **Work Session**, or **Phone** number, and then select the party you want to conference in from the updated list of available options. **OR** Type a phone number in the **Number to Dial** field.

Attention: In manual mode, if you press the Transfer/Conference buttons on the phone, the Transfer/Conference dialog box will not appear on CCAD as it does for other modes of predictive outbound.

3	Click **Consult**. *If the requested agent is available, Consult changes to Conference. A voice connection is established between the originating agent and the consulted agent. The customer is placed on Hold. The originating agent's status is TalkCustomerHold. The consulted agent's status is VoiceOnly.*
4	Speak to the consulted agent and provide any information needed before adding the customer to the conference call.
5	Click **Conference**. *The conference call is active. The originating agent is in Talking status. The consulted agent is in Talking status.*

Attention: In a SIP Contact Center transfer or conference of DN calls to RoutePoint Address is not supported.

--End--

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Ending a call

End a call when a call is completed. Depending on your current agent status when you click Release, different options are presented that provide different results. The Hangup and Leave Conference options disconnect you from the call. The Disposition option opens a Disposition Codes dialog box that displays both system and user-defined disposition codes. After you select a disposition code and click OK, the contact is closed.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Release**. *A menu appears displaying choices based on your current agent status. See Options when ending a call (page 58).*
2	Select a choice from the menu: • Hangup • Disposition • Leave Conference *Hangup and Leave Conference disconnect the agent from the call. Disposition displays a dialog box for the agent to select a disposition code before ending the contact.*
3	If you clicked **Disposition** in Step 2, select a disposition code from the **Disposition Codes** dialog, and then click **OK**.

--End--

Procedure job aid

Options when ending a call

Predictive Outbound status	Options available after clicking Release	Result
Talking	Hangup	The agent is disconnected from the customer and enters Wrapup status.
Talking	Disposition	The Disposition Codes dialog box appears.
Wrapup (available if a second call is connected)	Hangup	The call is disconnected.

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Options when ending a call

Predictive Outbound status	Options available after clicking Release	Result
Wrapup	Disposition	The Disposition Codes dialog box appears.
TalkCustomerHold (available for an agent who initiated a consultation and placed the customer on Hold)	Hangup	The agent being consulted is disconnected. The remaining agent is reconnected with the customer and returns to Talking status.
Voice Only (available for an agent being consulted)	Hangup	The agent being consulted is disconnected and returns to Ready status. The remaining agent remains connected with the customer.
Conferenced(Owner)	Disposition	The Disposition Codes dialog box appears.
Conferenced(Passive)	Leave Conference	The agent being consulted is disconnected. The remaining agent remains connected with the customer.
ConferencedExt(Owner)	Leave Conference	The agent is disconnected from the external party and the customer.
ConferencedExt(Owner)	Disposition Contact	The Disposition Codes dialog box appears.

Originating a call

You can originate a call to a customer when you are in Wrapup status.

Prerequisites

- Ensure that you are in Wrapup status.

Procedure steps

Step	Action
1	Click **Originate**.

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2	Select one of the customer phone numbers in the **Select Destination** box OR Manually type a phone number in the **Number To Dial** box.
3	Click **Dial**.

--End--

Scheduling a callback

Schedule a callback when you want to arrange a callback with a customer for a future date or time.

Prerequisites

- Ensure that you have a Predictive skillset designated for handling telephone calls.

Procedure steps

Step	Action
1	Click **Schedule Callback**.
2	In the Schedule Callback window, select a **Date** and **Time** for the callback.
3	Select whether the time for the callback should be based on the **Agent Local Time** or the **Customer Local Time**.
4	Select one of the customer phone numbers in the **Phone** list **OR** Manually type a phone number in the **Number** box.
5	Select the **Type** of callback.
6	Select an **Agent** for the callback.
7	Type a note in the **Memo** box, if applicable to the callback.
8	Click **OK**.

--End--

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Procedure job aid

Schedule Callback fields

Field	Descriptions
Date	Date for the scheduled callback.
Time	Time for the scheduled callback. The default for the scheduled callback is the current Call Center time plus twenty minutes.
Agent Local Time or Customer Local Time	The location where the Date and Time apply. Select Agent Local Time to use the Date and Time of the call center for the callback. Select Customer Local Time to use the Date and Time of the customer's location for the callback.
Number	Manual phone number to use for the callback. If a manually entered phone number is in the Number field, it will be used instead of a phone number in the Phone list.
Phone	List of available phone numbers for the customer. To use a select number in the Phone list, ensure that the Number field is empty.
Type	Type of callback or Predictive Outbound campaign. The Type selected determines the Agent and Team names that can be selected. The callback types are: • Standard: The callback goes to any available agent in the original Predictive Outbound campaign type. • Personal: The callback goes to the agent scheduling the callback, regardless of the Predictive Outbound campaign type or Team assigned. • Enterprise Campaign: The callback goes to the next available agent, if the agent scheduling the callback is not available. • Private Campaign: The callback goes to the agent scheduling the callback. • Enterprise Team: The callback goes to the next available agent in the assigned Team. • Private Team: The callback waits for the agent scheduling the callback to be assigned to the Team.

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Schedule Callback fields

Field	Descriptions
Agent	Agent for the callback. The Team selected determines the Agent names that can be selected.
Team	Team for the callback. The Type of callback determines the Team names that can be selected.
Memo	Memo text entered by the agent scheduling the callback will appear at the bottom of the call script when the callback contact is presented to an agent.

Handling a Standard callback call

Handling a Standard callback call is similar to handling a normal call in each mode of predictive (Manual, Paced, Preview, Progressive and Predictive) apart from memo text. A contact is presented to an agent as a result of a scheduled Standard callback type.

A Standard callback call is delivered to your Agent Desktop automatically. The Customer Details and call script, including any Memo notes entered when the scheduled callback was created, appear on your Agent Desktop.

You can preview or cancel or dial the customer's phone number if the contact presented to the agent is Preview or Manual contact.

Prerequisites

- Ensure that you are in Ready status.
- The work session on CPSEE Application server is active.

Procedure steps

Step	Action
1	Respond to the call when it is presented to you. *Your agent status is Talking.*
	--End--

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Handling a non-Standard Callback call

Handling a non-Standard callback call is similar to handling a Preview call for the agent. A contact is presented to an agent as a result of a scheduled callback of any of the following types:

- Personal
- Enterprise Campaign
- Private Campaign
- Enterprise Team
- Private Team

Any of these callback call types enable you to preview a call before you or the system dials the customer's phone number. You are given a predefined time period to preview the contact. Before this time period expires, you can Dial the customer's phone number or Cancel the contact. When the Preview time period expires, the system dials the customer and presents the call to you.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appears on the Agent Desktop. *Your agent status is PreviewCallback. The Preview time period begins to time down and the Time Remaining is displayed in the Preview Contact dialog box.*
2	Choose one of the following actions: • Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer. • Click **Cancel** to cancel the contact. • Respond to the call when the Preview time period expires and the system automatically presents the call to you. *If you or the system dials the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.*

--End--

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E-mail

When you review multimedia contacts, you can reply to the customer by using e-mail messages. This chapter describes how to perform e-mail tasks.

Use the Agent Desktop to perform the following tasks when you handle an e-mail message:

- Accept the incoming contact.
- Review and update customer information.
- Send a reply.
- Add an attachment.
- Insert a template or autosignature.
- Forward an e-mail message.
- Finish an e-mail message.

You can use the Agent Desktop to create a new e-mail message.

Prerequisites

- Ensure that your status is Ready.
- Ensure that you have the assigned skillset to handle e-mail messages.

Navigation

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- Declining an incoming contact (page 65)
- Creating an e-mail message (page 66)
- Verifying customer information (page 67)
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- Adding an attachment to your e-mail response (page 72)
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- Transferring a contact outside the contact center (page 78)
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Accepting an incoming contact

Accept an incoming contact to display customer details and begin contact with a customer. The Agent Desktop expands to show the customer details and the call timer appears in the status bar.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Accept**.
	--End--

Declining an incoming contact

Decline an incoming contact if you cannot handle the call. The telephony toolbar icons become inactive, except for the Originate button, which you can use to call a customer.

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Procedure steps

Step	Action
1	On the Agent Desktop, click **Reject**.
	--End--

Creating an e-mail message

Create an e-mail message to send additional information to a customer. The contact is saved in the Multimedia database.

Prerequisites

- Ensure that you are assigned to an e-mail skillset.
- Ensure that you are not currently handling a contact.

Procedure steps

Step	Action
1	On the multimedia toolbar, click **Customer E-mail**. If the multimedia toolbar is not visible, click the toggle bar under the Accept button on the telephony toolbar to open the multimedia component, and then click **Customer E-mail**.
2	In the **To** box, enter the e-mail address of the customer and add additional **Cc** or **Bcc** addresses as required.
3	In the **Subject** box, type the message subject.
4	In the body text box, type the message text. You can type text or use a response template.
5	To add an attachment, click **Attach**.
6	Select the appropriate skillset from the **Skillset** drop-down list.
7	In the **Agent Note** box, type any information about the contact or the customer. Only agents and supervisors can view the information in the Agent Note box.
8	Click **Send**. *The system searches the database for the customer e-mail address. If the customer does not exist in the database, the system creates a new*

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customer record, as well as a new contact and response record. The contact is closed automatically.

--End--

Verifying customer information

Verify customer information by viewing the left side of the Multimedia window, which shows customer details, the history of recent customer interactions, and other information.

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 History on the left-hand pane of the Agent Desktop window to view details of previous interactions with the customer, including automatic responses sent and the content of previous e-mail messages.

Procedure steps

Step	Action
1	On the Agent Desktop, click the **Details** tab to verify customer contact information.
2	Click the **History** tab to view the various actions in the customer history, including Reply, Contact rescheduled, E-mail to customer, and Transfer actions.
3	Click the **CI Details** tab to view additional details.

--End--

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Replying to an e-mail message

Reply to an e-mail message when a customer sends an e-mail 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 in the Agent Desktop interface to create your e-mail response in HTML or plain text:

- the address book
- one or more response templates
- an autosignature
- an attached file
- the spelling checker

You can also add a comment to an e-mail message in the Agent Note box for reference for later communications with the customer. The customer does not see the content of the Agent Note box.

Prerequisites

- 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 (page 69).
- Ensure that you understand how to create a template response. See Using a template response (page 71).
- Ensure that you understand how to use the spell-check feature. See Using the spell-check feature (page 74).
- Ensure that you understand how to add attachments to an e-mail message. See Adding an attachment to your e-mail response (page 72).

Procedure steps

Step	Action
1	After you review the customer contact, click **Reply**.
2	In the E-mail Response window, accept the default To e-mail address, with the same e-mail address from which the message was sent, or click **To**, **Cc**, or **Bcc** to add other e-mail 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.

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5	To sign the e-mail or to insert an autosignature, click the **Insert autosignature** button.
6	If you use HTML text and you want to bold, underline, or italicize any text, select the text and click the appropriate button to apply formatting. You cannot format plain text.
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 **Check Spelling** icon.
9	To add an attachment to the e-mail response, click **Attach**.
10	Select the appropriate skillset from the **Skillset** drop-down list.
11	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.
12	Click **Send**.
13	Close the contact. If required, select a reason for closing the contact.

--End--

Using the address book to reply to a contact

Use the address book to search for an e-mail address in the corporate address book or in the customer database when you use e-mail 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 e-mail message. The address book can contain information from an external directory, a local directory, or a customer database.

Procedure steps

Step	Action
1	In the e-mail window, click **To**, **Cc**, or **Bcc**.
2	In the **Select Names** dialog box, in the **Search for records from** box, select the database to search. *The address book appears and displays a list of entries from the database in the left pane, sorted in alphabetical order by last name.*
3	Type a name in the search field in the following format: last name, first name. The search field is not case-**sensitive**.

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

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

You can double-click on a name to add it to the To list.

5 To display additional details about any name that appears in the address book, select the name, and then right-click **Properties**.

6 Click **Close** to close the **Properties** window and return to the address book.

7 After you select all required recipients for the e-mail message, click **OK**.

--End--

Removing a name from the recipient list

Remove a name from the recipient list if you do not want to send the e-mail to the contact. Removing a name from your recipient list does not remove the name from your address book or database.

Procedure steps

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

--End--

Creating a template response

Create and store your own templates to use predefined messages or responses to typical customer queries. You can use part of all of the template text as your e-mail response.

Procedure steps

Step	Action

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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 extension (for example, WarrantyURL.txt).
4	Navigate to the folder where you want to store the template response file.
5	Save the file.

--End--

Defining your default template folder

Define the location of the default template folder to use if you want to use a template in an e-mail response.

Procedure steps

Step	Action
1	On the **multimedia** toolbar, click **User Settings**.
2	In the **Default Template Location** box, type the complete path to the template folder or click **Change** to select a new folder location.
3	Click **Save**.

--End--

Using a template response

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

Procedure steps

Step	Action
1	In the e-mail window, click the Insert Template icon.

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2	Navigate to the template folder. *If you defined a template folder in the user settings, the default template folder automatically appears.*
3	Select the template file, and then click **Open**.
4	If necessary, edit the text in the body of the e-mail message.

--End--

Defining your default attachment folder

Define a default attachment folder where you store and access files to add as attachments to e-mail messages. You can add a file from the Shared Files folder that your administrator creates, or you can navigate to any other directory, folder, or subfolder on your computer and attach a file from there. You must save file attachments with UTF-8 encoding.

Procedure steps

Step	Action
1	On the **multimedia** toolbar, click User Settings.
2	In the **Default Attachment Location** box, type the path to the folder containing the attachment, or click **Change** to change the current folder location.
3	Click **Save**.

--End--

Adding an attachment to your e-mail response

You can add one or more file attachments to any e-mail message that you send to a customer.

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Procedure steps

Step	Action
1	Click **Attach**. *If you defined an attachment folder in the user settings, the default attachment folder automatically appears. If you want to add a file from a different location, navigate to the appropriate directory or folder.*
2	Locate and select the file that you want to attach.
3	Click **Open**.

--End--

Viewing e-mail attachments

View e-mail attachments that a customer attached, as well as any files that you, or another agent, attached, using the **Contact Details** window.

Attention: Some Internet browsers do not support some attachment formats.

Procedure steps

Step	Action
1	In the **Contact Details** window, click the **History** tab.
2	Double-click **Attachments** to view attachments in a new browser window.

--End--

Removing an attachment from an e-mail response

You can remove one or more attachments from an e-mail response to a contact.

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Procedure steps

Step	Action
1	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**.

--End--

Using the spell-check feature

Use the spell-check feature on the Agent Desktop interface to locate spelling errors in your e-mail 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 e-mail message by selecting a language from the list on the right side of the toolbar.

The spell-check feature highlights words in the e-mail 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 remains. The spell-check feature closes automatically when it can find no more misspelled words.

Attention: The spell-check feature does not check spelling in attachments.

Procedure steps

Step	Action
1	When you finish typing your e-mail message, click the spell-check 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.

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- 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 and to add the word to the dictionary.
- Click **Options** to configure conditions for the spell-check feature, such as to ignore words with digits, words in uppercase, and words with HTML tags.
- Click **Cancel** to terminate the spell-check feature.

--End--

Closing the e-mail contact

Close the e-mail 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 steps

Step	Action
1	Click **Close** to complete the contact.
2	Select one of the configured **Closed Reason** codes that best describes the reason you closed your e-mail message.

--End--

Postponing work on a contact

Postpone work on a contact if you are waiting for further information for the contact.

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Prerequisites

- Copy and save text from an e-mail message that you started to have the information available when the contact becomes active again. Otherwise, if you started an e-mail message and the work is postponed, the content of the e-mail message is lost.

Procedure steps

Step	Action
1	Click **Reschedule** to postpone work on the contact. You still own the contact and can continue to work on the contact when you receive a reply from the external source.
2	In the **Present Contact at** dialog box, enter the time and date to reopen the contact. *The default Pending timer is configured in the Contact Center Multimedia Administrator. The contact reopens when the Pending timer expires.*
3	In the **Agent Note** field, add a note to the contact to remind yourself why the contact is in Pending state. You can view the pending contact in the History tab.

--End--

Following up on a contact

Follow up on a contact after you complete a contact but want to perform a follow-up action, for example, if you want to transfer a contact to another agent.

Procedure steps

Step	Action
1	Click **Follow-up**.
2	Perform the necessary follow-up action on the contact.

Attention: In a SIP Contact Center transfer or conference of DN calls to RoutePoint Address is not supported.

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--End--

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Transferring a contact within the contact center

Transfer a contact to another skillset or to a specific agent within the contact center.

When you transfer a contact to a skillset or 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 new attachments to the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** 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 a brief note about the reason for the transfer.
5	Click **Transfer**.

Attention: In a SIP Contact Center transfer or conference of DN calls to RoutePoint Address is not supported.

--End--

Transferring a contact outside the contact center

Transfer a contact to an e-mail address outside the contact center for consultation.

When you transfer a contact to an external e-mail address, you must manually add any attachments you want to send with the e-mail.

Procedure steps

Step	Action
1	Click **Transfer**.

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2	Click the **External** tab.
3	Enter the e-mail 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 a brief note about the reason for the transfer.
5	To add an attachment, click **Attach**.
6	Click **Transfer**.

--End--

Printing contact details

Print contact details to print a summary of the interaction with a contact. All information shown in the bottom left of the e-mail or outbound contact window prints.

Procedure steps

Step	Action
1	Click **Print**.

--End--

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Web communications

With the Web communications feature, you can communicate directly with customers in real time over the Internet. You can use the Contact Center Agent Desktop to perform the following tasks during a text chat:

- Accept an incoming contact.
- Review and update customer information.
- Send an automated response.
- Push a Web page.
- Check whether the customer's browser is still connected.
- Check the time of the last customer action and whether the customer is currently typing a message.
- Respond to the customer (e-mail or voice) if more information or clarification is needed.
- End a chat session.

This chapter describes how to perform the tasks for text chat sessions.

Prerequisites for Web communications

- Ensure that both you and the customer use Web browsers that work with JavaScript and frames. Netscape 4.7 or later, Internet Explorer 5.5 or later, or Firefox are examples of acceptable browsers for the customer.

Attention: Support is not available for microbrowsers, such as those available for Win CE 2.0, WinTV, PDAs, or other portable devices.

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- Accepting a Web communications contact (page 81)
- Customizing a tab name (page 83)
- Declining a Web communications contact (page 83)
- Sending a chat message (page 84)

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- Adding an auto-phrase to a chat message (page 84)
- Displaying timestamps (page 85)
- Pushing a Web page to a customer (page 85)
- Selecting a predefined URL to send to a contact (page 86)
- Ending the Text Chat session (page 87)
- Sending the chat log in an e-mail message (page 87)

Accepting a Web communications contact

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 Contact Center Agent Desktop to conduct a two-way conversation by exchanging messages.

A customer requests a chat session by clicking a text chat icon on the Web site. The customer is presented with a form to fill in and can select the appropriate skillset, subject, and objective for their chat session and 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 have previewed or pushed to the customer. Each chat message can contain up to 4045 characters.

The Agent Desktop can be configured to give visual and audible alerts when a contact is presented. These features are configured by an administrator, using the Contact Center Multimedia Administrator. For information about enabling or disabling these features, see the *Contact Center Multimedia Server Administration Guide*.

With the Multiplicity feature, if you handle an Instant Message (IM) Web communication contact, you can accept additional contacts, for example an email contact or a voice contact. However, after you accept a contact different than an IM Web communication contact, you can accept no more additional contacts until you end the contact.

You can handle multiple IM web communication contacts simultaneously with a different contact types, for example, an email contact or a voice contact. Click on a contact tab to switch between the active contacts A Summary Panel displays, next to the Additional Contact button, displays information about the selected tab, for example, skillset, contact name and elapsed time.

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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 last 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. The right pane 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.
- Preview the URL—Preview the URL in the Enter URL box.
- Add the selected auto phrase—Adds the selected auto-phrase to the Conversation frame.
- Select the text alignment—Change the direction of text from left to right to right to left and vice versa.
- E-mail chat log—Select the check box to e-mail a copy of the chat log to the customer.
- Display timestamps—Select the check box to display a timestamp to the left of each message you send and receive.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you have the skillset assigned for handling Web communications.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Accept**.
2	To accept an additional contact, click **Additional Contact**.

Attention: Your site administrator configures the maximum number of additional contacts you can manage.

--End--

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Customizing a tab name

If you have multiple IM Web communications contacts, customize the tab name to identify the received contact.

Procedure steps

Step	Action
1	On the CCAD right panel, double-click the required tab.
2	Type the <contact name>.

--End--

Variable definitions

Variable	Value
<contact name>	The keyword you use to identify the customer, for example the first or last name.

Declining a Web communications contact

Decline a Web communications contact when you are not available to chat with a customer and you want to place the contact back in the queue.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Reject**. *The contact is placed back in the queue and into Web-on-hold. Your status is set to Not Ready.*

--End--

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Sending a chat message

Send a chat message to communicate privately with a customer in real time over the Internet.

Procedure steps

Step	Action
1	In the Chat box, type the text of your comments to the customer.
2	Click the **Send the Message** icon. *Your name or agent label appears in the Conversation frame, followed by your comments.*

--End--

Adding an auto-phrase to a chat message

Add an auto-phrase to a chat message when you want to select a commonly used phrase from a configured list.

Procedure steps

Step	Action
1	In the Chat box, select the auto-phrase you want to use from the list.
2	Click the **Auto-phrase** icon. *The auto-phrase is added to the Chat box. When the chat message is completed and saved, the auto-phrase is added to the Conversation frame and the Text Chat log.*

--End--

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Displaying timestamps

Display timestamps on messages if you want to record the time that the messages occurred and display timestamps on the screen and in the Text Chat log.

If you select the **Show** checkbox during a text chat session, the timestamps appear only on messages from that point in the session. Messages sent or received before you selected the **Show** checkbox do not display a timestamp.

Procedure steps

Step	Action
1	Click the **Show** checkbox, located below the conversation window.
	--End--

Pushing a Web page to a customer

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 the other person's browser. For example, with personalized Web pages that can be customized 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 because you and the customer each have separate cookies. Cookies are never shared by you and 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 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.

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- If a customer pushes more than one page to you, or you push several pages to a customer, only the most recent page shows in your browser.

Procedure steps

Step	Action
1	In the **Enter URL** box, enter the URL of the Web page you want to send to the customer.
2	If you want to preview the URL, click the **Preview the URL** icon.
3	Click the **Push the URL** icon. *The page is pushed to the customer's browser and the URL is added to the Conversation frame and the Text Chat log. If the **Do not display Pushed pages locally** check box is cleared, an Internet browser opens and the Web page appears on your desktop.*

--End--

Selecting a predefined URL to send to a contact

Select a URL from a list of predefined URLs to send to a contact when you want to choose a Web page currently associated with your skillset.

Procedure steps

Step	Action
1	In the **Enter URL** box, select a predefined URL from the list.
2	If you want to preview the URL, click the **Preview the URL** icon.
3	Click the Push the URL icon.

--End--

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Ending the Text Chat session

End the text chat session when the contact is completed. The text chat history is saved automatically and can be printed.

Procedure steps

Step	Action
1	Click **Finish**.
2	In the **Notes** box, enter notes about the contact.
3	If closed reasons are required, choose a closed reason.
4	Click **Close**.
5	Repeat step 1 to step 4 to close each additional Web communications contact.

--End--

Sending the chat log in an e-mail message

If your contact center is licensed for e-mail, you can send a copy of the completed text chat log by e-mail to the customer.

Procedure steps

Step	Action
1	Select the **Chat Log** check box, which is below the conversation window.

--End--

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Instant messaging

Use the Instant Message (IM) window to communicate with customers over the Internet in real time. You can use the Instant Message window to perform the following tasks:

- Accept an instant message.
- Decline an instant message.
- Send an instant message.
- Use an auto-phrase.
- View personnel using Unified Communications (UC) Presence.
- Consult on an instant message.
- Conference an instant message.
- Transfer an instant message.
- End an instant message.

You can perform the tasks with an agent from your contacts list in My Contacts tab or an agent from an Instant Experts group in CC Contacts tab.

When you request a Consult, Conference, or Transfer with another agent, the text that you type appears in a separate conversation window that is not visible to the customer. During the request, you can change a Consult or a Transfer to a Conference or you can Close the request. When the other agent accepts a Conference or Transfer request, the conversation resumes in the Contact Center Agent Desktop (CCAD) Conversation window.

Note: IM is not supported in Contact Center Express.

Prerequisites for instant messaging

- Ensure that your contact center is SIP-enabled.
- Ensure that both you and the customer use Web browsers that work with JavaScript and frames.

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Attention: Support is not available for microbrowsers or portable devices.

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Accepting an instant message

Accept an instant message request to communicate with a customer. When an instant message contact is routed to you, it appears in the Telephony toolbar. The Accept and Reject buttons flash.

Prerequisites

- Ensure that you work with an Office Communications Server in your contact center.
- Ensure that your status is Ready.
- Ensure that you have been assigned a skillset to handle instant messages.

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Procedure steps

Step	Action
1	On the telephony toolbar, click **Accept**. *The pane on the left of the Agent Desktop shows the customer details and history of all past interactions with the contact center. The pane on the right shows the text window and the tools available for instant messages.*

--End--

Declining an instant message

Decline an instant message request if you are sent a contact that you cannot receive. When an instant message contact is routed to you, it appears in the Telephony toolbar. The Accept and Reject buttons flash.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Reject**. *The contact is placed back in the queue and your status changes to Not Ready.*

--End--

Sending an instant message

Send a response to an instant message that you accepted from a customer.

Procedure steps

Step	Action
1	In the text box, type your comments to the customer

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2	Review your comments before you send them by using the scroll bars if necessary.
3	Click **Send**. *Your name or agent label appears before your comments in the conversation frame.*

--End--

Using an auto-phrase

Use an auto-phrase to add commonly used text to an instant message. The administrator defines auto-phrases using the Contact Center Multimedia Administrator.

Procedure steps

Step	Action
1	In the Conversation window, click **Suggest Phrase**.
2	Click the auto-phrase you want to use from the list.The auto-phrase is added to the Conversation preview window.
3	Edit the text if necessary.
4	Click **Send**.

--End--

Using suggested Web pages

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.

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Procedure steps

Step	Action
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**.

--End--

Using spellcheck in an instant message

Use spellcheck to check spelling before you send an instant message.

Procedure steps

Step	Action
1	In the Conversation window, click **ABC**.
2	Click the appropriate button when spellcheck highlights a word that is not found in the dictionary.
3	When the spellcheck is complete, click **Send**.

--End--

Viewing personnel using UC Presence

View personnel in your contact center using UC Presence. You can view all personnel or a subset of them according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away).

UC presence control has two tabs: My Contacts and CC Contacts. The My Contacts tab lists contacts that you configure with Microsoft Office Communicator (OC). The CC Contacts tab lists the Instant Experts groups that a site administrator configures.

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A site administrator can configure default Instant Experts groups to load automatically after you log on to CCAD. The name of the default Instant Expert groups have an underscore (_) in front, for example, _autoload. Other skillset-associated and keyword-associated Instant Experts groups appear after you accept an incoming multimedia contact. The default Instant Experts groups appear first in the list of groups.

After confirming that a contact is available by using UC Presence, you can send, consult on, transfer, or conference an instant message to the contact.

Procedure steps

Step	Action
1	On the Multimedia toolbar, click **UC Presence**.
2	To view your contacts, click **My Contacts** tab.
3	To view Instant Experts groups, click **CC Contacts** tab.

--End--

Transferring an instant message using UC Presence

Transfer an instant message to another person, after you confirm that the person is available by using UC Presence.

Procedure steps

Step	Action
1	On the Multimedia toolbar, click **UC Presence**.
2	To transfer a message to an agent from your list, click **My Contacts** tab and perform step 4 to step 6.
3	To transfer a message to an agent from an Instant Experts group, click **CC Contacts** tab and perform step 4 to step 6.
4	Determine the person you want to transfer the instant message to, and confirm that they are available.
5	Right-click the name of the person and click **Transfer**.

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The person you want to transfer the instant message to must click Accept. The current instant message text then appears in the person's Conversation window.

6 Click **Complete Transfer**.

The instant message is now transferred to the person and is no appears on your Agent Desktop. Your status is Ready.

--End--

Consulting on an instant message using UC Presence

Consult on an instant message with another person after you confirm that the person is available by using UC Presence.

Procedure steps

Step	Action
1	On the Multimedia toolbar, click **UC Presence**.
2	To consult an agent from your contacts list, click **My Contacts** tab, and perform step 4 to step 6.
3	To consult an agent from an Instant Experts group, click **CC Contacts** tab, and perform step 4 to step 6.
4	Determine the person with whom you want to consult, and confirm that they are available.
5	Right-click the name of the person, and then click **Consult**. *The person you want to consult must click Accept. The current instant message text then appears in the person's Conversation window.*
6	When your conversation is complete, click **Close**.

--End--

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Conferencing an instant message using UC Presence

Conference an instant message with another person after you confirm that the person is available by using UC Presence.

Procedure steps

Step	Action
1	On the Multimedia toolbar, click **UC Presence**.
2	To conference with an agent from your contacts list, click **My Contacts** tab, and perform step 4 to step 7.
3	To conference with an agent from an Instant Experts group, click **CC Contacts** tab, and perform step 4 to step 7.
4	Determine the person with whom you want to consult, and confirm that they are available.
5	Right-click the name of the person, and click **Conference**. *The original Consult window closes and a new Conversation window appears. The person you want to conference in must click Accept to participate in the instant message conference. The current instant message text then appears in the person's Conversation window.*
6	Click **Complete Conference**. *The new Conversation window closes and the original Conversation window reappears. When the new person begins typing, the participant list above the text displays updated contact information for all participants in the conference.*
7	To leave the conference, click **Close**. *A message in blue appears in the Conversation window to indicate when a participant leaves the conference. The departure is added as an Action to the Contact History.*

--End--

Transferring an instant message using the Toolbar

Transfer an instant message to another available person.

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Procedure steps

Step	Action
1	On the telephony toolbar, click **Transfer**.
2	Determine the person you want to transfer the instant message to, and confirm that they are available.
3	Right-click the name of the person and click **Transfer**. *The person you want to transfer the instant message to must click Accept. The current instant message text then appears in the person's Conversation window.*
4	Click **Complete Transfer**. *The instant message is now transferred to the person and is no longer displayed on your Agent Desktop. Your status is set to Ready.*

--End--

Consulting on an instant message using the Toolbar

Consult on an instant message with another available person.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Conference**.
2	Determine the person with whom you want to consult, and confirm that they are available.
3	Right-click the name of the person and then click **Consult**. *The person you want to consult must click Accept. The current instant message text then appears in the person's Conversation window.*
4	When your conversation is complete, click **Close**.

--End--

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Conferencing an instant message using the Toolbar

Conference an instant message to another available person.

Procedure steps

Step	Action
1	On the telephony toolbar, click **Conference**.
2	Determine the person with whom you want to consult, and confirm that they are available.
3	Right-click the name of the person and click **Conference**. *The original Consult window closes and a new Conversation window appears. The person you want to conference in must click Accept to participate in the instant message conference. The current instant message text then appears in the person's Conversation window.*
4	Click **Complete Conference**. *The new Conversation window closes and the original Conversation window reappears. When the new person begins typing, the participant list above the text displays updated contact information for all participants in the conference.*
5	When you want to leave the conference, click **Close**. *A message in blue appears in the Conversation window to indicate when a participant leaves the conference. The departure is added as an Action to the Contact History.*

--End--

Ending an instant message

End an instant message when the contact is complete.

Procedure steps

Step	Action
1	Click **Close**.

--End--

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Customer and contact details

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

- Create a customer record.
- Search for a customer.
- Add or edit customer information.
- Search for a contact.
- Print search results.
- View a contact.
- Open a contact.
- Close contacts (supervisors only).

In the Customer Details tab, you can view Communication Control Toolkit (CCT) intrinsics.

Prerequisites for working with customer and contact details

- Ensure that you have permission to handle outbound, e-mail, or Web communications.
- Ensure that you are a supervisor if you want to close multiple contacts.

Navigation

- Creating a customer record (page 99)
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Creating a customer record

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.

You must enter either a telephone number, e-mail address, or SIP Uri for a valid customer record. Entering only a customer name does not create a customer record in the database.

If you create more than one e-mail address for a customer, you must select a default e-mail address to use when you begin a contact with the customer.

Prerequisites

- Ensure that you have no customer records currently open.

Procedure steps

Step	Action
1	In the **Customer Details** window, click **Create**.
2	In the **Title** box, select a salutory 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 names for the customer.
5	In the **E-mail Address** box, type an e-mail address for the customer.
6	In the **SIPUri** box, enter a SIP Uri for the customer.
7	In the **Phone Type** box, select the type of phone number.
8	In the remaining telephone number boxes, type the international code, area code, and telephone number.
9	Click **Save**.

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--End--

Searching for a customer

Search for a customer to view or edit customer details or 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
- E-mail Address
- SipUri

Prerequisites

- Ensure that the multimedia toolbar is visible.

Procedure steps

Step	Action
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 by a column, click the column heading of the field by which you want to sort.
7	Double-click the customer record to open.

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--End--

Adding or editing customer information

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

Prerequisites

- Ensure that you have no customer records currently open.
- Ensure that you have permission to handle outbound, e-mail, or Web communications contacts.

Procedure steps

Step	Action
1	Click the **Details** tab of the Customer Details pane.
2	Click **Edit** to change the customer information or **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 e-mail addresses, be sure to select one as the default.
6	Click **Save**.

--End--

Viewing a CCT intrinsic

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

Prerequisites

- You must accept a contact.

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Procedure steps

Step	Action
1	On the **Contact Center Agent Desktop** window, click **Customer Details**.
2	Click **Customer Details**.
3	In the **Custom Fields** section, click the **Intrinsic** tab. The CCT intrinsics appear.

--End--

Copying a CCT intrinsic

Copy a CCT intrinsic to use the intrinsic in another application.

Procedure steps

Step	Action
1	On the Contact Center Agent Desktop window, click **Customer Details**.
2	In the **Custom Fields** section, click the **Intrinsics** tab.
3	Right-click the required CCT intrinsic.
4	Click **Copy**.

--End--

Viewing the Auto Launch Application

You can view the Auto Launch Application to identify which default application starts after you accept a voice contact.

Prerequisites

- You must accept a voice contact.

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Procedure steps

Step	Action
1	On the **Contact Center Agent Desktop** window, click **Customer Details**.
2	In the **Custom Fields s**ection, click the **Intrinsics** tab. In the **Auto Launch Application** section, the default application appears with a check mark.

--End--

Running a CCT intrinsic-associated application

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

Prerequisites

- You must accept a voice contact.

Procedure steps

Step	Action
1	On the **Contact Center Agent Desktop** window, click Customer Details.
2	In the **Custom Fields** section, click the **Intrinsics** tab.
3	Right-click the required CCT intrinsic value.
4	Select the required application.

--End--

Searching for a contact

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

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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 display 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.

Prerequisites

- Ensure that the multimedia toolbar is visible.

Procedure steps

Step	Action
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 by a column, click the column heading of the field by which you want to sort.
7	Double-click the contact to open.

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--End--

Printing search results

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

Prerequisites

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

Procedure steps

Step	Action
1	Generate the search results for a customer or contact search.
2	Click the **Print** icon.
3	Select the correct settings for your printer.

--End--

Viewing a contact

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 because the contact is not open.

Prerequisites

- Ensure that your status is Not Ready.

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Procedure steps

Step	Action
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.

--End--

Opening a contact

Open a contact to add or edit information, to complete an outbound call, or to send a reply to an e-mail message.

You can open a contact only if you have ownership of the customer on the contact.

Prerequisites

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

Procedure steps

Step	Action
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	Ensure that your status is **Not Ready**.
4	Right-click 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.*
5	Click **Yes** to open the contact.

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The Agent Desktop automatically changes your status to Ready and answers the pulled contact.

6	View the contact details on the right pane of the Agent Desktop window. *You can now complete an outbound call, reply to an e-mail message, or add an attachment to an e-mail message.*

--End--

Closing contacts (supervisors only)

Supervisors can close contacts, if they want to remove a single contact or a group of contacts, by changing the contact status from Open to Closed.

You must enter a reason for closing contacts.

Prerequisites

- Ensure that you are a supervisor.
- Ensure that no agent is currently working on any contact that you want to close.

Procedure steps

Step	Action
1	Select the contact to close or select multiple contacts by pressing the **Ctrl** key while you click each contact. *Selected contacts are highlighted 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**.

--End--

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Nortel Contact Center

Agent Desktop User Guide

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