9608/9611G and 9621/9641G H.323 Deskphone Call Center User Guide

16-603613
Issue 1
May 2011

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- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

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This device complies with the FCC's and Industry Canada's RF radiation exposure limits set forth for the general population (uncontrolled environment) and must not be co-located or operated in conjunction with any other antenna or transmitter.

Warning

The handset receiver contains magnetic devices that can attract small metallic objects. Care should be taken to avoid personal injury.

Power over Ethernet (PoE) warning

This equipment must be connected to PoE networks without routing to the outside plant.

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Chapter 1: Introduction to the Avaya Call Center Agent Deskphones

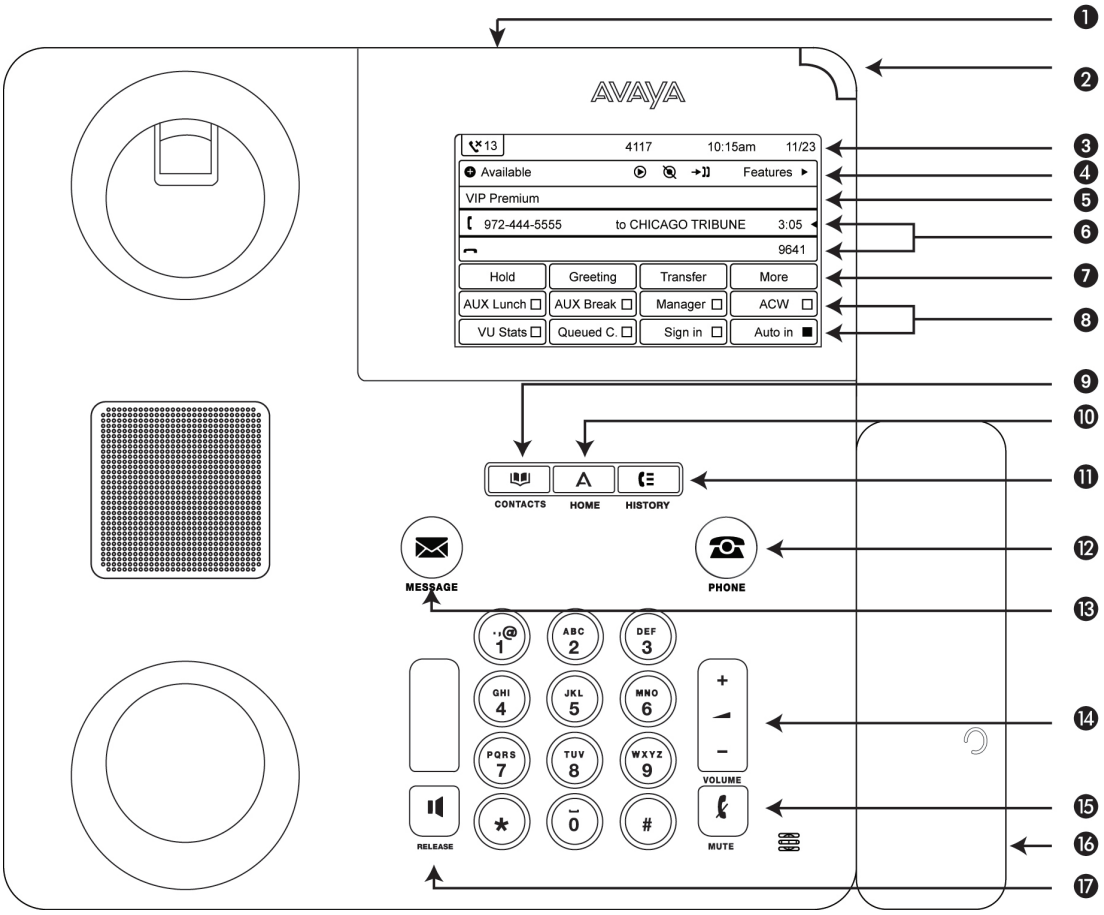
The 9608, 9611G, 9621G, and 9641G are multiline deskphones that can be used in a standard office environment or with Avaya Call Center 3.0 (or later releases). The 9621G and 9641G are touch–based phones with a color display. The 9611G and 9608 are button-based phones; the 9611G has a color display while the 9608 has a monochrome display. The 9641, 9608, and 9611G models allow a dual headset adapter to be connected so that two persons can listen in on calls, and one or more button modules can also be attached to these models to extend call appearances and/or features. Additionally, the 9641G has an optional faceplate designed specifically for using this model in a call center. For an agent, these deskphones put convenient features and capabilities at your fingertips, including a Phone Screen to view and manage your calls, and icons indicating agent status, call states, feature status, queued calls, and missed calls. Designated feature buttons let you change your agent work mode or status with one touch.

Not all functions and features described in this user guide may be available on your deskphone or applicable to the way your call center operates. If you find that a function or feature is not available, contact your supervisor or system administrator.

Important:

This guide describes only the features and operation of the 9608, 9611G, 9621G, and 9641G deskphones in a call center environment. Standard office deskphone operation and features like placing calls, reviewing call history, conference calling, and modifying deskphone options and settings for your personal preferences are covered in separate user guides. Depending on which deskphone model you have see either the *Avaya one-X™ Deskphone H.323 9608/9611G User Guide (Document Number 16–603593)* or the *Avaya one-X™ Deskphone H.323 9621G/9641G User Guide (Document Number 16–603594)*, available on the Avaya Support Site http://avaya.support.com.

9621G and 9641G buttons and features



Note:

The illustration above depicts a 9641G model with a call center faceplate and a dual headset adapter replacing the handset as the only voice option.

Callout No.	Name	Description
1	USB Port	If administered, you can insert a USB device (also called a memory stick, thumb drive, or flash drive) to transfer contacts between your phone and an external data source. You can also recharge some battery-powered devices by using a USB cable to connect the device to your deskphone's USB port. Note: the 9621G does not have a USB port.
2	Message Waiting Indicator	An illuminated red light in the upper-right corner of your phone indicates you have messages waiting. This light flashes when you receive an incoming call. If Visual Alerting is enabled, this light flashes when you receive an incoming call. In addition to the Message Waiting Indicator, the

Callout No.	Name	Description
		Message button is also illuminated when you have voice mail messages waiting.
3	Phone Display: Top Line	When the phone is idle, the top line shows the missed call icon with the number of calls missed, your primary extension, and the time and date. System messages also display on the top line.
4	Phone Display: Agent Status Line	When you are logged in as an agent, the Status line (below the top line) shows your current work status; see About status line information and icons on page 35 for information. Touch **Features** on the right side of the Status line to move from the Phone screen to the Features list. Touch **Calls** on the right side of the Status line to move from the Features list to the Phone screen.
5	Phone Display: Agent Information Line	The Agent Information line below the Status line shows information about a call state; see About the agent information line on page 36 for information.
6	Call Appearance/ Feature lines	When the Phone screen is active, the lines below the Status line show call appearances — for example, information about an active call, an idle line, or which line has a held or conference call. Touch a call/line appearance to make or answer a call. When the Features list is active, the lines show the call center features you use to do your job, such as VU Stats, After Call work, etc. Touch a labeled feature button to enable or disable that feature. The feature buttons provide access to the Avaya call center system features that have been administered for your extension. The green LED next to each feature button indicates if the feature is currently on or off. If the green light is on, the feature is on. The feature buttons provide the same features that are available in the features menu. For more information about the features menu, see Features Menu. If you have the Quick Touch panel activated at the bottom of the display (see Setting the Quick Touch on page 18panel), only two or three call appearance lines show on the display, depending on how many lines you indicate for the Quick Touch panel.
7	Softkeys	The bottom line of the display shows the softkeys applicable to the information displayed on the screen. Softkey labels appear directly on the softkeys, which you touch to take the indicated action. The labels and the actions vary depending on the current context.
8	Quick Touch Panel	If administered, the Quick Touch panel provides additional buttons for features and work modes. Note that when displayed, the Quick Touch panel may overlay some of your

Callout No.	Name	Description
		call appearance lines. See Setting the Quick Touch Panel on page 18 for more information.
9	Contacts	Press the **Contacts** button to view the entries in your contact list.
10	Home	Press the **Home** button to access the Home screen. The Home screen provides options that allow you to set up or modify call center greetings, customize phone settings, configure call logging, select the display language, view network information, and log the telephone extension out.
11	History	Press the **History** button to view a list of your outgoing, incoming, and missed calls. The icon on the History button is illuminated when you have missed calls. DAC calls (direct agent calls) will show on your log but call center calls will not.
12	Phone Button	Press the **Phone** button to return to the Phone screen from the Features list or another application.
13	Message	Press the **Message** button to connect directly to your voicemail system.
14	Volume	Press **+** or **-** on the **Volume** button while active on the headset to adjust the volume. To adjust the volume of the ringer, press + or - on the volume button while the headset is inactive.
15	Mute	Press the **Mute** button to mute a call in progress. To take a call off mute, press **Mute** again.
16	Dual Headset Adapter	When attached, this adjunct device allows two people with headsets to listen to the same call.
17	Release	Press the **Release** button to end a call.

Scrolling and navigation using touch-based deskphone models

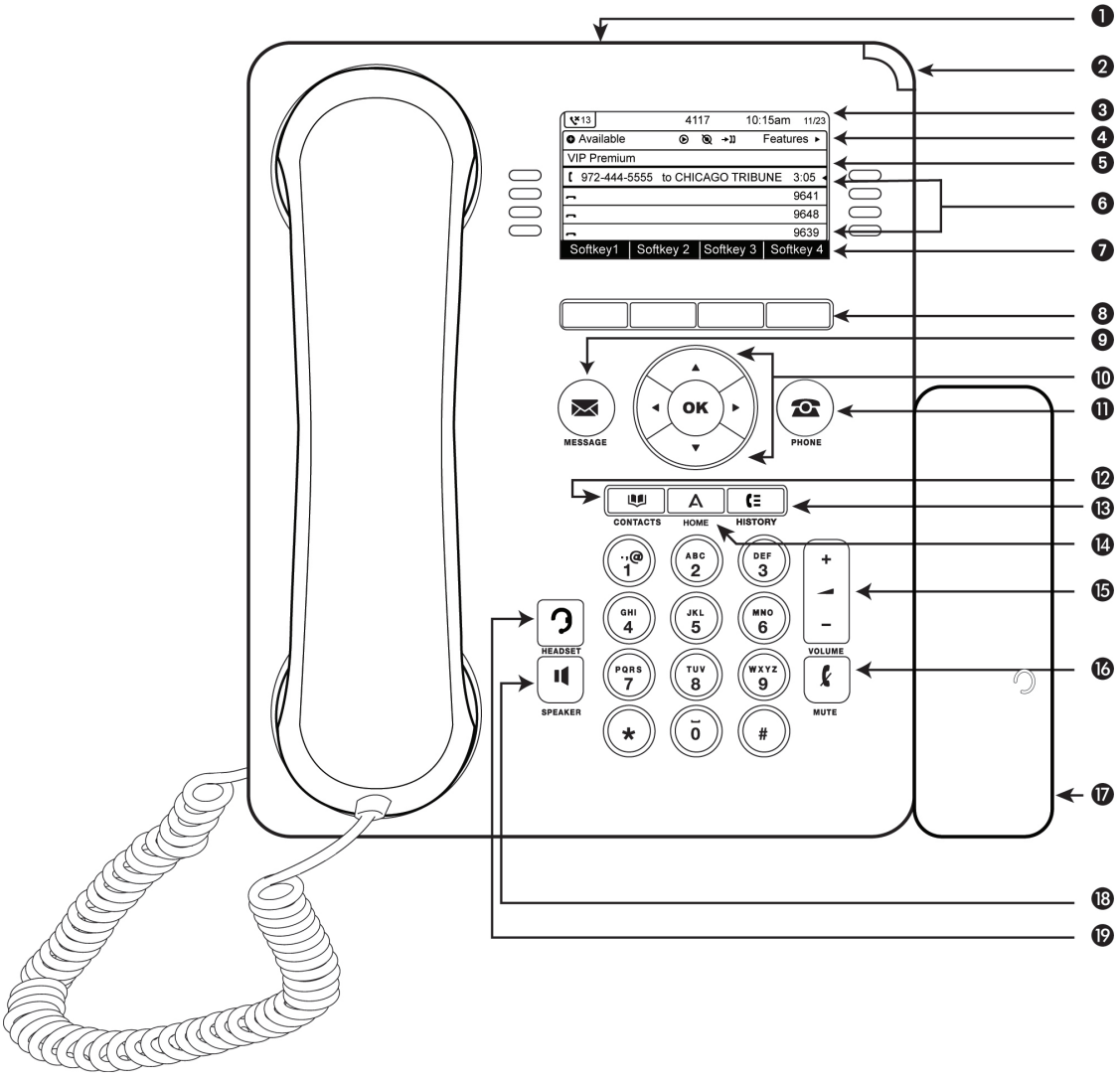
If you have a 9621G or 9641G deskphone model, use the on-screen up and down arrow buttons on the right middle of the screen to scroll up or down through a list.

To switch between call appearances and features, touch **Features** or **Calls** in the upper right of the display, depending on which screen is currently displayed.

On touch-based phones, when a list item has a “Details” button (a blue right-facing arrow), touching it shows more information about the item. For example, touching the line of a greeting produces a detail screen showing the details on file for that greeting.

You act on objects such as a line or softkey by touching them or by touching the on-screen softkey labels. Softkey labels change according to the context. For example, touch a greeting number then touch the **Play** softkey to listen to that greeting, or touch a line on the Calls screen to answer an incoming call, to go off hook to place a call, or to resume a call on hold.

9608 and 9611G buttons and features



	Name	Description
1	USB Port	Available on 9611G deskphones only. If administered, you can insert a USB device (also called a memory stick, thumb drive, or flash drive) to transfer contacts between your phone and an external data source. You can also recharge some battery-powered devices by using a USB cable to connect the device to your deskphone's USB port. Note: the 9608 does not have a USB port.
2	Message Waiting Indicator	An illuminated red light in the upper-right corner of your phone indicates you have messages waiting. This light flashes when you receive an incoming call.
3	Phone Display: Top Line	When the phone is idle, the top line shows the missed call icon with the number of calls missed, your primary extension, and the time and date. System messages also display on the top line.
4	Phone Display: Agent Status line	When you are logged in as an agent, the Status line (below the top line) shows your current work status; see About status line information and icons on page 35 for information.
5	Phone Display: Agent Information line	The Agent Information line below the Status line shows information about a call state; see About the agent information line on page 36 for information.
6	Phone Display: Call Appearances/ Feature Lines	When the Phone screen is active, the Call Appearance lines show call information — for example, information about an active call, an idle line, or which line has a held or conference call. When the Features list is active, the display area shows the call center features you use to do your job, such as VU Stats, After Call work, etc.
6	Call/Line Appearance Buttons or Feature Buttons	There are up to 8 buttons along the right and left sides of the display screen that can be programmed as either call appearance/line buttons or feature buttons. Press a call appearance/line button to make or answer a call or to resume a call on hold. Press a labeled feature button to activate or deactivate that feature. The feature buttons provide access to the Avaya call center system features that have been administered for your extension. The green LED next to each feature button indicates if the feature is currently on or off. If the green light is on, the feature is on. The feature buttons provide the same features that are available in the Features menu. For more information about the features menu, see Features Menu.
7	Phone Display: Softkey Labels	The bottom line of the display shows the softkey labels applicable to the information displayed on the screen.
8	Softkeys	Press the softkeys to select the actions indicated by the softkey labels above them. The labels and the actions vary depending on the current context.

	Name	Description
9	Message	Press the **Message** button to connect directly to your voicemail system.
10	Navigation Arrows	A scroll bar appears on the right side of the display area when there is more information than can be displayed. Press the up or down navigation arrows on the scroll bar to scroll through lists in that direction. Press the right or left navigation arrows to navigate between different views of an application, to move between the Calls screen and the Features menu, to move the cursor during text input, or to move between option choices, for example, when working in a greetings screen.
10	OK	Press the **OK** button for a shortcut to an action. For example, when you select a call log entry, pressing **OK** dials the number.
11	Calls/Features	Press **Calls** to move from the Features list to the Phone screen. Press **Features** to move from the Phone screen to the Features list. Pressing the Phone button on the phone also displays the Phone screen.
12	Contacts	Press the **Contacts** button to view the entries in your contact list.
13	History	Press the **History** button to view a list of your outgoing, incoming, and missed calls. The icon on the History button is illuminated when you have missed calls. DAC calls (direct agent calls) will show on your log but call center calls will not.
14	Home	Press the **Home** button to access the Avaya menu. The Avaya Menu screen provides options that allow you to set up or modify call center greetings, customize phone settings, configure call history logging, select the display language, view network information, and log the telephone extension out.
15	Volume	Press **+** or **-** on the **Volume** button while active on the headset to adjust the volume. To adjust the volume of the ringer, press + or - on the volume button while the headset is inactive.
16	Mute	Press the **Mute** button to mute a call in progress. To take a call off mute, press **Mute** again.
17	Dual Headset Adapter	An adjunct device vailable on the 9608 deskphone to allow more than one person to listen in on a call.
18	Speaker On/Off	Illuminates when the Speakerphone is active.
19	Headset On/Off	Illuminates when a Headset is active.

Scrolling and navigation using button-based deskphone models

If you have a 9608 and 9611G model deskphone a navigation icon appears in the phone display to indicate that you can scroll to more options or information. When navigating through the options and features on your telephone display, use the navigation arrows to scroll and the line buttons or the **OK** button to select lines or options. The navigation arrows are located on the phone itself surrounding the **OK** button.

When you scroll to a line on the display, that line is selected, as indicated by highlighting. The softkey labels change according to the options available for the selected line. The **OK** button is a shortcut for the default action. For example, when you select a greeting number, pressing the **OK** button displays details about that greeting. You can also select a line or feature without scrolling by pressing the corresponding line button.

Call Center work icons

The icons in the following table indicate the state of a call, navigation choices, or the status of a call center feature or activity. Depending on the action they depict, these icons can appear on the agent status line, the Information line, a call appearance line, or in the general application area of the display screen. If you have a monochrome deskphone (9608), the icons show in black and white. If you have a color display deskphone (9611G, 9621G, or 9641G), the icons display in color and/or gray shades.

Note:

For information about the agent work status icons, see About status line information and icons. on page 35

Icon	Description
	Missed call(s); a call was not answered or was forwarded to voice mail. If there is more than one missed call, the total number of missed calls displays next to this icon.
	This call appearance line is idle and not in use.
	An incoming call is alerting on this call appearance line.
	A call is active on this line.
	A call is on Hold on this line.

Icon	Description
	Your calls are being forwarded.
	A Conference is active on this line.
	A Conference is on hold on this line.
	A Bridged Call is in progress on this line.
	If the Phone screen is displayed, use the right arrowhead icon to access the Features screen. If the Features screen is displayed, use the right arrowhead icon to access your calls on the Phone screen.
	Scroll up or down when there is more information than can display in the application area.
(9608)  (9611G)  (9621G, 9641G))	Indicates a Forced Logout Override is in effect. Depending on how your call center system is administered, a system-generated "forced" logout might occur, for example, based on the time of day; this icon indicates an override is active.
(9608)  (9611G, 9621G, 9641G)	Notifies you that your Agent Greeting has been recorded and is available.
(9608)  (9611G, 9621G, 9641G)	Notifies you that your Agent Greeting is being played.
(9608, 9611G)  (9621G, 9641G)	Indicates the Queued Calls feature is active and you have calls in the queue.
Σ (9608)  (9611G) (9621G, 9641G)	Indicates that the VU Stats feature is active.
(9608, 9611G)	Use the feature arrows to move left or right between feature settings, for example, to select a Greeting type when establishing an Agent Greeting.

Icon	Description
 (9621G, 9641G)	

Note:
For a few screens (for example, the Contacts main screen), these icons may not be displayed to allow room for other controls and indicators that apply to that specific screen.

Status alerting

For button-based agent deskphone models (9608 and 9611G) each call appearance button and feature button has two LEDs, one green and one red, to indicate the status of the call appearance or feature. For touch-based agent deskphones (9621G and 9641G), the entire line is shown in a color to indicate call status, and for the Feature list, a colored square icon indicates the status. The status is identified by whether the LED/color highlight is on, off, or blinking (LEDs only) as described in the following tables.

Table 1: Call appearance button LEDs/line colors

LED or Line Color	Description
Steady green LED	Call appearance or Feature is active (9608, 9611G only).
Steady blue highlight on line	Call appearance is active (9621G and 9641G only).
Steady yellow highlight on line	Call appearance is active (9611G only)
Slow blinking green LED	Call appearance is ringing (9608, 9611G only)
Steady green highlight on line	Call appearance is ringing (9621G and 9641G only)
Steady red LED	Call appearance is selected and will be used when you go off-hook. It remains steady red while you use the call appearance (9608, 9611G only).
Off	Call appearance is available.

Table 2: Feature button LEDs

LED/Square Icon	Description
Steady green	Feature is active.
Off	Feature is not active.

Using the on-screen keyboard

If you have a touch-based deskphone (9621G or 9641G), an on-screen keyboard appears when you add or edit Greeting labels or to allow you to enter a full or partial telephone number string to match when you are setting up a VDN-type greeting. You can switch between alphabetic and numeric keyboards, and you can use the keyboard to enter symbols and accented letters.

Use the diagrams that follow to add or change text or numbers. Touching and holding the Backspace or cursor right/left buttons down produces an “automatic repeat” action that stops when you lift your finger or stylus. Remember to touch the “Done” check mark when you finish editing. Use the “Cancel” X to discard any edits and return to the previous screen, retaining the original information.

Figure 1: Text Entry Keyboard

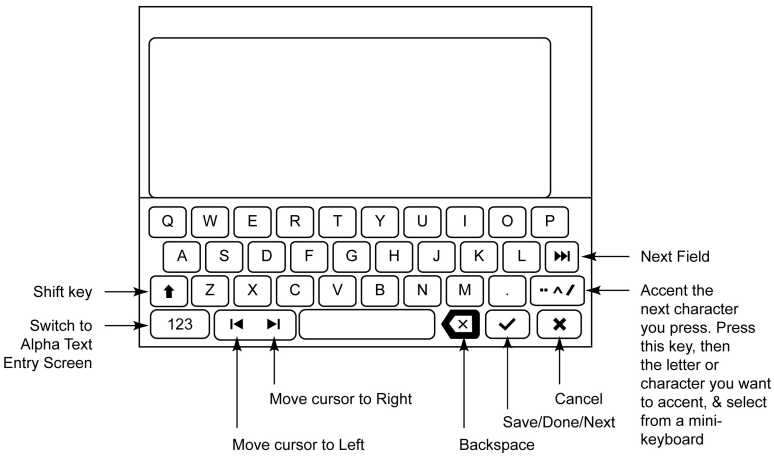
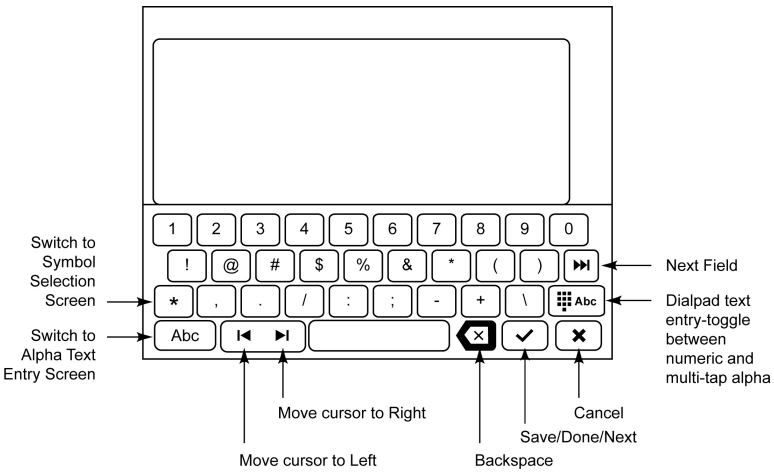


Figure 2: Numeric Entry Keyboard



Setting the Quick Touch panel

About this task

When you use the Quick Touch panel, the Calls screen provides access to more of your work states, features, at a glance. When a feature is on/active, the associated button is highlighted in green. You can set the Quick Touch Panel to display one (the default) or two lines, or set it not to display at all. Note that displaying the Quick Touch panel can limit your call appearances display to two or three lines at a time.

Procedure

1. Press **Home**.
2. Touch Settings.
3. Touch Options & Settings.
4. Touch Screen and Sound Options.
5. On the Screen and Sounds menu, touch Show Quick Touch Panel to change the setting from 1 Line to 2 Lines, from 2 Lines to No, or from No to 1 Line.

   Note:

   When you are signed in as an agent, the default number of lines on the Quick Touch panel is two lines; when you are not signed in as an agent, the default number of lines is one.
6. Touch **Save** to save the setting or **Cancel** to return to the menu without saving.

Adjustable telephone stand

The deskphone stand attaches to the phone in one of two ways so that you can place the phone in a relatively flat position or at an angle. Before you attach the stand, take note of your deskphone's Model Number label, attached to the deskphone's underside.

The 9621G and 9641G models also let you adjust the display screen to different angles for optimal viewing. To move the display screen, gently pull from the top of the display screen towards you. As you pull the screen towards you, you may hear a clicking sound. Each of these four clicks is a locking position for the display screen. Gently push on the display screen to adjust the screen to a previous position. Gently pull the display screen all the way towards you and push to return it to its original flat position.

Chapter 2: About logging in/out and signing in/out as an agent

Call center agents have two types of logins:

- one for the telephone extension itself (login), and
- one that identifies you as a call center agent (sign in.)

To sign in as an agent, you must first log in to the deskphone itself unless the deskphone is already logged in. To log out from your telephone extension, you must first sign off as an agent. If you share a deskphone with another agent, you may be instructed to just sign in and sign off as an agent, leaving the deskphone logged in at all times to preserve call center information. There are different ways to sign in and out as an agent, depending on how your call center system is administered:

- using a Feature Access Code (FAC) provided by your supervisor, or
- using a Feature button labeled Sign In or Sign Out,
- using a Feature button labeled Login or Logout,
- using another Feature Button, softkey, autodial button, or abbreviated dial button designated by the system administrator for agent sign in and sign out.

Your supervisor will explain the proper agent sign in/out procedures for your call center environment, which may not be the same as the procedures provided in this chapter. In all cases, follow the Agent sign in/out procedures your supervisor provides.

Logging in to your telephone extension

About this task

Before you can sign in as an agent, you must log in to your telephone extension if you have not already done so. Log in from the initial screen when it prompts you for your extension.

Procedure

1. Enter your extension.
2. If you have a touch-based deskphone, touch **Enter**. If you have a button-based deskphone, press **Enter** or **OK**.

3. Enter your password.
4. If you have a touch-based deskphone, touch **Enter**. If you have a button-based deskphone, press **Enter** or **OK**.

Logging out of your telephone extension

Procedure

1. Press **Home**.
2. If you have a touch-based deskphone, select Settings. If you have a button-based deskphone, proceed to the next step.
3. If you have a touch-based deskphone, touch Log Out. If you have a button-based deskphone, scroll down and select Log Out.
4. If you have a touch-based deskphone, touch Log Out to confirm. If you have a button-based deskphone, press Log Out or **OK**, then press Log Out to confirm.

Signing in as an agent

About this task

If the telephone prompts you for your Extension, you must first log in to the deskphone before your enter your call center agent identification.

Important:

The agent sign in procedure that follows uses a Feature Access Code (FAC). Depending on how your call center operation is administered, this particular sign in procedure may not apply. For example, some call center systems may be administered for Agent sign in using a Feature Button or softkey. In this case, sign in to the Call Center as you have been trained to do by your supervisor. Also note that when signing in using other than a Feature Access Code (FAC), the Agent Greetings functionality will not be available to you, nor will your Agent ID display on the Top line.

Procedure

1. Enter your Sign In Feature Access Code using the dialpad.
2. Enter your Agent ID using the dialpad.
3. Enter your Agent Password, if applicable.

Result

The top display line now shows your Agent ID and the Agent Status line shows your current status (Aux Work, etc.). The headset LED is illuminated and the Aux Work feature button is shown as active/on.

Signing off as an agent

About this task

Depending on how your call center system is administered and how busy the call center is, the system may override your attempt to sign out. In this case, follow the procedures specified by your supervisor.

Important:

The agent sign off procedure that follows uses a Feature Access Code (FAC). Depending on how your call center operation is administered, this particular sign off procedure may not apply. For example, some call center systems may be administered for Agent sign off using a Feature Button or softkey. In this case, sign off from the Call Center as you have been trained to do by your supervisor.

Procedure

Enter your Sign Off Feature Access Code (FAC) using the dialpad.

Result

The top display line no longer shows your Agent ID and the Agent Status line shows your current status as Logged/Signed Out.

Chapter 3: About the Home Screen and Avaya Menu Options

Home screen and Avaya menu

If you have a 9621G or 9641G Deskphone, the Home screen contains icons that provide access to adjust and customize options and settings for your deskphone, record and update your Greetings, get information about your phone and network settings, and log out. But if you have a 9608 or 9611G Deskphone, the Avaya Menu provides access to those features instead.

Note:

The options, settings, and sub-menus that appear on the Home Screen and Avaya Menu depend on how your extension was administered. Some items described here may not be available. Other options, settings, and sub-menus may be available which are not specifically call center-related. For example, you may also see Browser, Directory, VPN Settings, and/or Guest Login on the Avaya Menu or Home screen. For those standard features, see either the *Avaya one-X™ Deskphone H.323 9608/9611G User Guide (Document Number 16–603593)* and the *Avaya one-X™ Deskphone H.323 9621G/9641G User Guide (Document Number 16–603594)*, available on the Avaya Support Site http://avaya.support.com.

The Home Screen (touch-based phones)

Press the Home button under the display to access the Home screen. The Home screen has a black background with icons that let you access your telephone's options and settings to adjust or customize them or view your phone and network settings. From the Home screen, you can also set up and update your Agent Greetings, access Web-based applications to get information about the time and weather in different parts of the world, display a calculator, use Favorite speed dial buttons, and log out your telephone extension. The exact content of your

Home screen depends on how your administrator has set up your system but it normally includes the following standard Avaya features:

- Greetings lets you add up to six Agent Greetings, edit those greetings, ad remove greetings you no longer need.
- Settings displays a menu that lets you change your call settings, the language in which information displays on the screen, the way your screen looks and sounds, log into a phone as a guest, clean your screen, log your phone out, and more.
- World Clock shows the time and weather in different parts of the world. This is an Avaya application that may not be available on Call Center deskphones.
- Weather shows the current weather conditions in an area you choose and a short-term weather forecast. This is an Avaya application that may not be available on Call Center deskphones.
- Calculator provides a simple, four-function calculator. This is an Avaya application that may not be available on Call Center deskphones. This is an Avaya application that may not be available on Call Center deskphones.
- My Pictures lets you use pictures from a USB device as your telephone screensaver.

Your administrator may make other Web-based applications available to you, for example, a corporate directory or support page. To invoke any application you see on the Home screen, touch its icon. Depending on how many Avaya applications, contact favorites, and/or Web-based applications are administered, you may have a second page for your Home screen. Touch the scroll bar on the right side of the Home screen to view the next page.

Note:

The Settings options that appear depend on how your extension was administered. Some options described in this guide may not be available to you. This guide describes the Greetings option only; for other features and applications that may be on your touch-based deskphone, see the *Avaya one-X Deskphone H.323 9621G/9641G User Guide (Document number 16–603594).*

Avaya Menu (button-based phones)

You can use the Avaya Menu to adjust and customize options and settings for your telephone, add or update Agent Greetings, access additional Web-based applications, get information about your phone and network settings, and log out. Except for Agent Greetings on page 27 which is described in this guide, the menu choices you see are explained in detail in the *Avaya one-X™ Deskphone H.323 9608/9611G User Guide (Document Number 16–603593)*. When you press the Home button, you see the following menu, depending on how your administrator has set up your system and on the applications available to you:

Note:

The menus and sub-menus that appear depend on how your extension was administered. Some options or sub-menus may not be available. Contact your System Administrator if you have any questions.

Sample Menu — if no WML Applications administered	Sample Menu — with WML Applications administered
> **Greetings** > **Phone Settings** > **Guest Login** > **Log Out** > **About Avaya one-X** > **My Pictures**	> **Greetings** > **Options & Settings** > **Browser** > **Network Information** > **VPN Settings** > **Log Out** > **About Avaya one-X** > **My Pictures**

Note:

On menus without WML applications, select **Phone Settings** to access the standard telephone Options & Settings menu.

Greetings let you add an Agent Greeting, change an existing Agent Greeting, or remove an Agent Greeting you no longer need.

Options & Settings or Phone Settings, if your menu is customized, lets you change your call settings, personalize button labels, adjust brightness and contrast, select your ringing pattern, and more.

The Browser menu contains additional web-based applications. (If no web applications are available for your phone, the Browser menu is not shown.)

Network Information shows a summary of network-related parameters for your phone and provides diagnostic information. If your administrator has set up Web applications, this option appears under the Phone Settings menu instead.

About Avaya one-X provides the release number of your telephone software; our administrator may ask you to check the release number to troubleshoot problems.

Guest Login lets you log in to a phone to which you are not normally assigned, to access your own contacts and features.

Log Out lets you sign off the phone, to protect your settings or to allow another user to log in. Log out does not display unless your phone (and any associated button module) is in an idle state.

My Pictures lets you use pictures from a USB device as your telephone screensaver, but is only available on those deskphones with a USB interface.

Chapter 4: Setting Up and Using Recorded Agent Greetings

About Agent Greetings

Agents can record their own “greetings” which can then be played back to callers. For example, “Thanks for calling Informaxx. My name is Sally; How can I help you?”. Up to six greetings can be set up, each ten seconds in length. Recorded greetings consist of a Label (or greeting name), the recorded greeting itself, and an optional Type. The agent initiates Manual type greetings while VDN greeting types play automatically by recognizing the number the caller has dialed and playing the corresponding greeting. This can be important when the agent handles incoming calls for different departments or companies. When you set up a VDN greeting, you must specify which numbers the system should look for to play the correct VDN greeting. You can also specify where in the phone number the system should look. The pattern of numbers the system looks for is called a “match string” and the place to look is called a “match criterion.” See About call center greeting types on page 27 for more information. To set up a greeting, see Adding an agent greeting using a touch-based deskphone on page 29 if you have a 9641G or 9621G model or Adding an agent greeting using a button-based deskphone on page 31 if you have a 9608 or 9611G model.

Note:

Supervisors or administrators can prevent agents from setting up their own greetings. If you don't see a Greetings option on the Avaya Menu (9608, 9611G) or the Home screen (9621G, 9641G), your administrator has denied you permission to establish and modify your own greetings.

About call center greeting types

When you add a greeting, a default type of “Auto Answer” is automatically assigned and will play that greeting for all incoming calls. There are other greeting types that may apply to your operation depending on how your call center is set up and how many different customers are assigned to an agent. Your supervisor will assist you in setting up your greetings or might set them up for you. Because different greeting types have different match criteria options (and associated text strings), use the chart below to determine with your supervisor the type of greeting and associated information best suited to each type of greeting you record.

Table 3: Greeting Types and Match Criteria

Greeting Type	Description	Match Criteria Options
Manual	Agent must select the **Greetings** softkey to play the message for each incoming call.	None
Auto answer (default)	The greeting plays automatically for an incoming call or automatically for any incoming call that does not fully match other options.	Play for all incoming calls (default) or play for incoming calls when agent status is Available.
VDN	Vector Directory Number. Call vectors are commands that route incoming calls to the call center and determine how these calls are processed. The VDN permits each call to be treated uniquely according to a number of factors, including the number the caller dials, the number the caller calls from, the number of calls in queue, and the time of day and/or day of the week.	Anywhere (default) — the data matches any set of characters in the incoming call-associated display message; On left — the data matches the characters on the left end of the incoming call-associated display message; On right — the data matches the characters on the right end of the incoming call-associated display message; Exact match — the data matches exactly the entire incoming call-associated display message .
ANI	Automatic Number Identification. This type makes vector routing decisions based on the caller identity and the number of the originating line.	Anywhere (default) — the data matches any set of characters in the incoming call-associated display message; On left — the data matches the characters on the left end of the incoming call-associated display message; On right — the data matches the characters on the right end of the incoming call-associated display message; Exact match —the data matches exactly the entire incoming call-associated display message.
Prompted Digits	Used in call centers with automatic recordings for that “prompt” the caller to enter “digits” to reach a specific area of assistance in the call center. For example,	Anywhere (default) — the data matches any set of characters in the incoming call-associated display

Greeting Type	Description	Match Criteria Options
	a caller might be prompted to press “1” to reach Sales or “2” for Billing inquiries.	message; On left — the data matches the characters on the left end of the incoming call-associated display message; On right — The data matches the characters on the right end of the incoming call-associated display message; Exact match — the data matches exactly the entire incoming call-associated display message.

Adding an agent greeting using a touch-based deskphone

About this task

You can add up to six different greetings and set them to play automatically or manually when you have an incoming call.

Note:

Use this procedure if you have a touch-based deskphone (9621G or 9641G). If you have a button-based deskphone (9608 or 9611G), see Adding an agent greeting using a button-based deskphone on page 31.

Procedure

1. Press **Home**.
2. Touch **Greetings**.
3. Touch **New** or touch any numbered blank greeting line.
   The on-screen keyboard displays to allow entry of the new greeting's label.
4. Use the on-screen keyboard to enter a label that distinguishes this greeting from other greetings you may already have or will be adding. The Greeting Label can be up to 15 characters. See Using the on-screen keyboard on page 17 for details on entering text using the keyboard.
5. Touch the **Next** keyboard button.
6. Touch **Record**.
7. Speak your greeting (up to ten seconds) into the headset, then press **Stop**.
8. Choose one of the following options:
   - To listen to the greeting, touch **Play**.

- To replace the greeting, touch **Restart** and repeat the previous step.
- To save the recording, touch **Done** and proceed to the next step.
- To delete the recording you just made touch **Cancel**.

Next steps

If the default greeting type shown is correct, touch **Save** to save the Greeting, its label, and the Greeting type.

If the default greeting type is not the one you want, proceed to Changing the greeting type using a touch-based deskphone on page 30 before saving the greeting.

Related topics:

Changing the greeting type using a touch-based deskphone on page 30

Changing the greeting type using a touch-based deskphone

About this task

When adding a new greeting, the Greetings Type Selection screen displays after you indicate you are Done recording your greeting; new greetings are automatically assigned a default type of “Auto Answer ” with a Match Criterion of “All Calls” and you use the Greetings Type Selection screen to change that default type, if desired. When changing an existing greeting, the Greeting Type Selection screen displays when you select the greeting you want to change, and touch the Type Details icon.

The default greeting type “Auto Answer” with a Match Criterion of “All Calls” means that this greeting plays automatically when you answer an incoming call. Other types are Manual, VDN, ANI and Prompted Digits. Types other than Manual require that you also select match criteria (when to invoke this greeting, or where to find the data to trigger the greeting), and possibly additional data (a telephone number sequence or string) that allows the system to match the display message to a specific greeting. This is useful when you deal with different groups of customers and want a customer-specific greeting to play based, for example, on the number the caller has dialed. For more information about Greeting Types and their applicable match criteria, see About call center greeting types.

Procedure

1. With the greeting whose type you want to change displayed, touch the **Details** icon on the right side of the Type line.
2. Use the **Right Arrow** on the Type line to cycle consecutively through the available types or the **Left Arrow** to cycle back through the types. Notice that the Match Criteria value below the type may change to correspond with the type currently displayed

3. To change the match criterion for the greeting type, use the **Right Arrow** on the Match Criterion line to cycle consecutively through the available criteria or the **Left Arrow** to cycle back through the choices.
4. If the “String to Match” label displays, you must indicate what string of digits the telephone should look for. Touch the **Details** icon on the String to Match line and use the dialpad to enter the number sequence that should be matched for this greeting. For example, if you serve two customers with the telephone numbers 732–842–1111 and 732–842–2222, you can enter just the last four digits of those numbers as the strings to match for their respective greetings. After entering the string, press **Done** to return to the Type Selection screen.
5. Touch **Done** again, then touch **Save** on the Greetings Summary screen.

Adding an agent greeting using a button-based deskphone

About this task

You can add up to six different greetings and set them to play automatically or manually when you have an incoming call. The default greeting type “Auto Answer” with a Match Criterion of “All Calls” means that this greeting plays automatically when you answer an incoming call. Other types are Manual, VDN, ANI and Prompted Digits. Types other than Manual require that you also select match criteria (when to invoke this greeting, or where to find the data to trigger the greeting), and possibly additional data (a telephone number sequence or string) that allows the system to match the display message to a specific greeting. This is useful when you deal with different groups of customers and want a customer-specific greeting to play based, for example, on the number the caller has dialed. For more information about Greeting Types and their applicable match criteria, see About call center greeting types.

Note:

Use this procedure if you have a button-based deskphone (9608 or 9611G). If you have a touch-based deskphone (9621G or 9641G), see Adding an agent greeting using a touch-based deskphone on page 29 instead.

Procedure

1. Press **Home**.
2. Select **Greetings**.
3. Press **New** or press the line button for any numbered blank greeting line.
4. Use the dialpad to enter a label for that distinguishes this greeting from other greetings you may already have or will be adding. The Greeting Label can be up to 15 characters.

5. Press **Record**.
6. Speak your greeting (up to ten seconds) into the headset or speaker (whichever device is active) then press **Stop**.
7. Choose one of the following options:
    - To listen to the greeting, press **Play**.
    - To replace the greeting, press **Restart** and repeat the previous step.
    - To save the greeting, press **Done** and proceed to the next step.
    - To delete the greeting without saving it, press **Cancel**.
8. If the default greeting type shown (Auto Answer with a Match Criterion of “All Calls”) is correct, proceed to the last step. To change the greeting type, press the line button for the line on which Type appears to display the Greetings Type Selection screen and proceed to the next step.
9. On the Type line, use the **Right Arrow** to cycle consecutively through the available types or the **Left Arrow** to cycle back through the types. Notice that the Match Criteria value below the type may change to correspond with the type currently displayed.
10. To change the match criteria for the greeting type, press the line button on which Match Criteria appears, then use the **Right Arrow** to cycle consecutively through the available criteria or the **Left Arrow** to cycle back through the types.
11. Press the line button on which “String to match” appears and press **More**. Use the dialpad to enter a number sequence that should be matched. For example, if you serve two customers with the telephone numbers 732–842–1111 and 732–842–2222, you can enter just the last four digits of those numbers as the string to match for their respective greetings. After entering the string, press **More** again to return to the Type Selection screen.
12. Press **Done**, and then press **Save** on the Greetings Summary screen.

Changing existing greetings

You can change an existing greeting in any or all of the following ways:

- You can edit a greeting's label.
- You can re-record a greeting without changing any other part of it.
- You can edit the greeting Type, Match Criteria, and/or String to Match.
- You can delete the entire greeting and any associated data.

To change any part of a greeting, press **Home**, select **Greetings**, and then select the greeting you want to change or remove, as described in Adding an agent greeting using a touch-based

deskphone on page 29 and Changing the greeting type using a touch-based deskphone on page 30 for 9641G and 9621G models, and Adding an agent greeting using a button-based deskphone on page 31 for 9608 and 9611G models. You can then make a change as indicated in those procedures, and select **Save** to store the change(s).

Chapter 5: About Call Center Deskphone Functionality

Using Agent Deskphones in the Call Center

Your duties as an agent involve understanding how the deskphone presents work-related information, including work modes and agent status, call information, and greetings.

About status line information and icons

What you see on the display screen's status line depends on what you are doing at the time. Special icons indicate your status. At times, more than one icon might display, for example, when a greeting is playing and you have queued calls waiting.

If you see this icon and text:	your Status is:
(for monochrome displays) or  (for color displays) and the word **Available**	Signed in; in Available mode with no Aux Work pending.
(for monochrome displays) or  (for color displays) and the word **Pending**	Signed in; in Available mode with Aux Work or After Call Work pending.
(for monochrome displays) or  (for color displays) and the words **Aux Work**	Signed in; in Aux Work mode.
(for monochrome displays) or  (for color displays) and the words **After Call**	Signed in; in After Call Work mode.
(for monochrome displays) or  (for color displays) and the words **Logged Out**	Signed out as an agent.

If you see this icon and text:	your Status is:
Σ (for monochrome displays) or VU (for the 9611G color display) or 123 (for the 9621G and 9641G)	The VU Stats feature is active.
(for monochrome displays) or (for the 9611G color display) or (for the 9621G and 9641G)	Incoming calls are queued up and waiting.
(for monochrome displays) or (for the 9611G color display) or (for the 9621G and 9641G)	Forced logout override is in effect.

See Other call center action icons on page 14 for descriptions of other status indicators and icons for call center activities.

About the agent information line

When the Phone screen is displayed, the Agent Information line displays directly below the Status line. This line provides information such as the company or group for which you are assigned to receive calls or caller information based on the number the caller dialed.

About agent work modes and states

When you are logged in as an agent, icons on the top two display lines and the Feature buttons show your current work mode and state. Agent work modes are Auto-In, and Manual-In. An agent will usually have only one work mode (either Auto-In or Manual-In) administered for him or her. Agent states are:

Pending This state appears when you are in the Available state, but have pressed an Aux or ACW button. The Pending state reminds you that when the call is completed, you will be placed in the Aux or ACW state as applicable.

Aux You are placed in the Auxiliary state after agent login. You must change to Auto-In or Manual-In work mode to become available to receive incoming call center calls. You can change back to Aux to indicate you are not available to receive call center calls, for example, when you want to take a break. Depending on how your system is administered, you might be prompted to optionally enter or be required to enter a Reason Code when changing to Aux.

ACW	The deskphone may automatically put you into an ACW (After Call Work) state after you complete each call. If you were in Manual-In mode before the call you must re-enter a Manual-In mode to accept another call. Switch to ACW to perform after call work, such as completing a call-related form.
Available	This state is automatically assigned when you are not on an active call for both Auto-In and Manual-In modes.
Logged Out	This state is automatically assigned when the deskphone is administered as a call center phone but no agent sign-in has occurred. If you sign out as an agent but do not log off the deskphone, this status is also assigned.

See About status line information and icons on page 35 and About the agent information line on page 36for how to interpret upper line displays. See also Call center work icons on page 14 and Status alerting on page 16 for information on the icons and button LEDs you might see while signed in as an agent.

Changing agent work mode or status

Press or touch the line or feature button assigned to the work mode or work state to which you want to change. Alternately, access the Features menu screen and select the desired work mode/state. The associated LED flashes to indicate you are transitioning into the work mode or state you chose, then is steadily lit when the selected work mode or status is active.

Chapter 6: Answering a Call

Procedure

To answer a call to the Call Center, you must be signed in as an agent. When you receive an incoming call on a touch-based deskphone, the incoming line is highlighted. When you receive an incoming call on a button-based deskphone, the green LED associated with the call flashes. The incoming call is usually selected automatically. However, if you are already on a call or if you receive more than one incoming call at a time, you may need to select the call you want to answer manually. Receiving incoming call center calls also depends on your current work mode and status, as described in About agent work modes and states on page 36.

Answering a call if you are signed in as an agent

About this task

Several variables such as your call center system configuration, call delivery mode, agent status and whether you have one or more greetings recorded determine how you answer a call; see About agent work modes and states on page 36 and About status line information and icons on page 35 for more information. In all cases, you are alerted to incoming calls by a special tone, the call appearance line button flashing green (for button-based models) or the call appearance line itself highlighted in green (for touch-based phones), and the ringing icon displayed on the incoming call's line.

Note:

If you have a touch-based deskphone (9621G or 9641G), touch the desired softkey. If you have a button-based deskphone (9608 or 9611G), press the desired softkey. Alternate ways to using the **Answer** softkey to answer a call are to press the flashing line button for the incoming call (button-based models) or touching the call appearance line itself (for touch-based models). Your supervisor will advise you as to how incoming calls to the call center appear and provide any details not covered below.

Procedure

1. If you are in either Manual-In or Auto-In mode, you must always wait for an alerting signal (such as a ring or tone), then touch or press the **Answer** softkey. If Auto-Answer is enabled, the phone generates a zip tone to alert you, then activates the call. In either case, the table below identifies how to answer the call depending on what type of greeting(s) you have recorded:

If :	To answer the call:
No greeting is recorded	Start speaking to the caller.
A non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call	Listen to the greeting, then start speaking to the caller.
No non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call, but one Manual greeting has been recorded	Touch or press the **Greeting** softkey, listen to the greeting, then start speaking to the caller.
No non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call, but more than one Manual greeting has been recorded	Touch or press the **Greeting** softkey, select the appropriate greeting to return to the Phone screen, listen to the greeting, then start speaking to the caller.
No non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call, and no Manual greeting has been recorded	Start speaking to the caller.

2. Press or touch **Release** to end a call, unless you are instructed otherwise by your supervisor.

Chapter 7: About Features

Your administrator may have set up your telephone so that it presents the Features as described in this chapter together on one screen with your call appearances; if so, the features do not appear on a separate Features menu. However, for most agent deskphones, the Features menu gives you access to agent work modes, Speed Dial buttons and/or advanced telephony features like Directory, Abbreviated Dial, and Call Forwarding. Directory allows you to dial other users on your system by name. Abbreviated dialing, if set up by your administrator, lets you dial certain numbers by touching one number on the dialpad. You can use Send All Calls and Call Forward to have your incoming calls sent to other numbers. Note that if you have a touch-based phone, any features assigned to an attached Button Module will not display on the Features menu; if you have a button-based phone, features assigned to the Button Module will display on the Features menu. The particular features available to you depend on what your administrator has assigned to your phone.

In addition to the Features menu, your administrator may also place selected features on softkeys on the call appearance (Calls) screen. For touch-based phones, frequently used features can also be set up on the Quick Touch panel, if the panel is activated. For more information about what features and options are available for your extension, contact your system administrator.

Accessing the Features menu

Procedure

1. If you have a touch-based deskphone model (9621G or 9641G), from the Calls screen, touch the **Features** button at the upper right corner to view the Features menu. If you have a button-based deskphone model (9608, 9611G), use the **Right** navigation arrow from the Phone screen to access the Features menu.

   On a touch-based model, the ☐ icon next to a feature indicates the feature status; for a button-based model, the feature line button indicates its status. If shown in green on color phone models, the feature is active; if the icon is gray-shaded it is available but not active. For models with LEDs (9608, 9611G), the LED next to the feature name indicates if the feature is currently on or off. If the light is on, the feature is on.

2. Scroll down to see the features that have been administered for your extension.

Accessing features using a button module

About this task

If you have a button module attached to your agent deskphone, the button module might have feature buttons for call center features, additional call appearances, and standard deskphone features like Call Forwarding, Call Pickup, Go to Coverage, or Auto Callback.

Note:

The 9621G Deskphone does not support button modules.

Procedure

To use a feature button on a button module, press the button next to the feature you want to activate. Depending on your button module model, the LED associated with the feature you select lights up to indicate that feature is active.

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