Avaya Aura® Agent Desktop

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Chapter 1: Introduction

Avaya Aura® Agent Desktop is a single-interface client application used to interact with customers. You can respond to customer contacts through a variety of media, including phone, outbound contacts, email, Web communication, instant messaging, fax, scanned documents, and Short Message Service (SMS) text messages. Agent Desktop provides automation for customer responses to eliminate repetitive actions, such as typing a common response in an email message.

Agent Desktop supports the following contact types:

- Voice contacts
- Email messages
- Outbound contacts
- Web communications contacts
- Instant Messages
- SMS text messages
- Fax messages
- Scanned documents
- Voice mail messages
- Social Networking

Your administrator determines which type of contacts you can handle.

Agent Desktop uses Microsoft .NET Framework 4.0 Click Once Deployment technology, which means that you can install and start the application by entering a URL address in Windows Explorer or Internet Explorer.

Prerequisites

Procedure

- Ensure that you review the Contact Center installation procedures.
- Supported Operating Systems:
  - Windows XP Professional SP2 or later
  - Windows Vista SP2 or later

Comments? infodev@avaya.com

- Windows 7 (32 bit and 64 bit) Professional, Ultimate, and Enterprise editions
- Windows 8.1 (32 bit and 64 bit)

Note:

Windows 8.1 environment does not support the *My Computer* mode in Agent Desktop, since embedded phone operation is not supported in Windows 8.1.

- Ensure that the following are installed on the client machine. Administrative rights are required to install the following applications:
  - Microsoft Internet Explorer 7.0, 8.0, 9.0, or 10.0.
  - Microsoft .NET Framework 4.0
  - Windows Installer 4.5 Redistributable
  - Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)
  - Microsoft Visual C++ 2008 SP1 Redistributable Package (x86)

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Procedure

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Chapter 2: New in this release

The following sections detail what is new in Avaya Aura® Agent Desktop Release 6.4.

Features

See the following sections for information about feature changes:

- Advanced Screen pops on page 15
- After Call Work Item codes on page 16
- Agent Desktop configurable home page on page 16
- Agent Desktop Dashboard on page 16
- Call Join support on page 16
- Force Agent Log out and Change Agent State on page 17
- Improved Activity Codes on page 17
- Monitoring of non-skillset calls on page 17
- Proactive Outreach Manager on page 18
- Simplified voice contact Observe process on page 18
- Social Networking Contact Type on page 18
- Supervisor approval of email messages on page 18
- Third Line Appearance support on page 18
- Windows 8.1 Support on page 19

Advanced Screen pops

A screen pop is a third-party application that administrators configure using the Multimedia Administration tool. Agent Desktop displays screen pops when a contact alerts or is answered. Administrators can configure these screen pops to display relevant information about the alerting or answered contact based on the intrinsics, such as Skillset, To Address, and DNIS associated with the contact. For more information, see Screen pops on Agent Desktop on page 25.

Administrators can use Advanced Screen pops to configure individual screen pops to open on specific intrinsic triggers, which provide administrators with more range and flexibility with respect to

conditions and triggers for opening a screen pop. For information about configuring Advanced Screen pops, see *Avaya Aura® Contact Center Server Administration* (44400-610).

After Call Work Item codes

You must enter After Call Work Item (ACW) codes to perform post call processing work such as adding contact information to a CRM system.

You can use a new control **Set ACW Code**, which is available on the Agent Desktop Top bar menu to track ACW time.

Important:

In a Multimedia Complement for Elite solution, the **Set ACW Code** is not available on Agent Desktop and therefore Agent Desktop does not support this after call work functionality. Agent Desktop reason codes work in the same way as previous releases.

For more information, see Entering an After Call Work Item Code on page 53.

Agent Desktop configurable home page

Administrators can set up an Agent Desktop configurable home page to open a screen pop when you start Agent Desktop. The screen pop displays a Web page that the administrators configure. For more information, see Using the Agent Desktop configurable home page on page 38.

Agent Desktop Dashboard

The Agent Desktop Dashboard allows you to easily collect all Agent Desktop logs and related screen captures. You can upload this information directly to the Contact Center Multimedia (CCMM) server with a single click. This feature makes it easier for support staff to quickly gather all the information they need to debug issues on Agent Desktop. The Agent Desktop Dashboard also displays the status of the network connection between your desktop PC and the Contact Center servers.

Call Join support

You can use Call Join to conference together two previously unrelated voice calls. If you are active on a call and have one or two other unrelated calls on hold, you can join two calls together and add parties to the conference until there are six parties live on the conference. You must use your desk phone to drop calls from the conference. The surviving call after a call join has taken place is the oldest call.

Avaya Aura® Contact Center and Avaya Aura® Agent Desktop support Call Join. If you are using Avaya Aura® Agent Desktop with Proactive Outreach Manager (POM), then Call Join is not supported.

For more information about using Call Join, see Joining two voice calls on page 61.

Force Agent Log out and Change Agent State

The Force Agent Log out and Change Agent State features allow a supervisor to log out an agent, or change an agent's state to Ready or Not Ready, from the Contact Center Real-Time Displays.

When a supervisor logs out an agent or changes their state, Agent Desktop displays a message to the agent informing them of the change and the supervisor who made it.

Improved Activity Codes

An activity code is a number that you can enter on a phone or on Agent Desktop to track time spent on activities and service areas, not ready reasons, and after call work.

A supervisor or system administrator configures activity codes. Activity codes can be alphanumeric.

In Contact Center Release 6.4, administrators provide all newly entered codes with a discrete type so that Agent Desktop displays the codes under three separate controls:

- Activity codes
- Not Ready Reason codes
- After Call Work Item (ACW) codes

For more information see, Entering an Activity code on page 52.

Monitoring of non-skillset calls

In a SIP-enabled contact center based on a Communication Manager PABX, Contact Center allows supervisor-agents to observe and barge-in to non-skillset calls.

The administrator can configure beep tones for both observe and barge-in events. The administrator can configure Agent Desktop so that it displays an indicator to the agent on any work item that a supervisor/agent is monitoring.

For more information about monitoring non-skillset calls, see Observing a voice contact or non-skillset call on page 58 and Barging-in on a voice contact or non-skillset call on page 59.

Proactive Outreach Manager

Avaya Aura® Contact Center 6.4 now supports integration with Avaya Proactive Outreach Manager (POM). This integration provides agents with a single desktop experience for inbound and outbound contacts. POM launches calls in anticipation of the agent becoming imminently available, which allows Contact Centers to efficiently contact large volumes of customers.

Simplified voice contact Observe process

Agent Desktop provides a simplified Observe process for inbound voice contacts. Agent supervisors perform fewer steps to listen to agent voice contacts. For more information about the simplified Observe feature, see Observing a voice contact or non-skillset call on page 58.

Social Networking Contact Type

Contact Center Release 6.4 introduces a new Social Networking contact type. The Social Networking contact type provides close integration with Avaya Social Media Manager (SMM). Previous releases of Contact Center integrated with SMM using a standard email contact.

For more information about working with the Social Networking contact type, see Social Networking on page 150.

Supervisor approval of email messages

Supervisors can approve or reject the email messages that agents send to customers, before the email reaches the customers. The approver of the email messages is the supervisor assigned to the approval skillset of the contacts that the agent handles. For more information, see Supervisor approval of email messages on page 117.

For information about configuring supervisor approval of email messages, see *Avaya Aura® Contact Center Server Administration* (44400-610).

Third Line Appearance support

Avaya Aura® Contact Center supports up to three lines on each Agent Desktop. The third line is reserved for outgoing calls. You cannot use the third line to receive a personal call; but you can use it to originate a call.

For more information about using Third Line Appearance, see Accepting an inbound voice call while on an existing skillset voice call on page 62 and Making a call while on an existing voice call on page 62.

Windows 8.1 Support

Agent Desktop is now supported on Microsoft Windows 8.1 operating system.

Chapter 3: Agent Desktop User Interface

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

- to handle voice contacts in a voice-only contact solution
- to handle voice contacts, outbound contacts (voice calls from you to customers), email messages, or Web communications contacts in a voice and multimedia contact solution
- to work with Avaya Aura® Presence Services server, Microsoft Office Communications Server, or Microsoft Lync to handle instant messaging in a SIP-enabled Contact Center

This chapter describes the main user interface of the Agent Desktop application. There are three main sections to the Agent Desktop user interface:

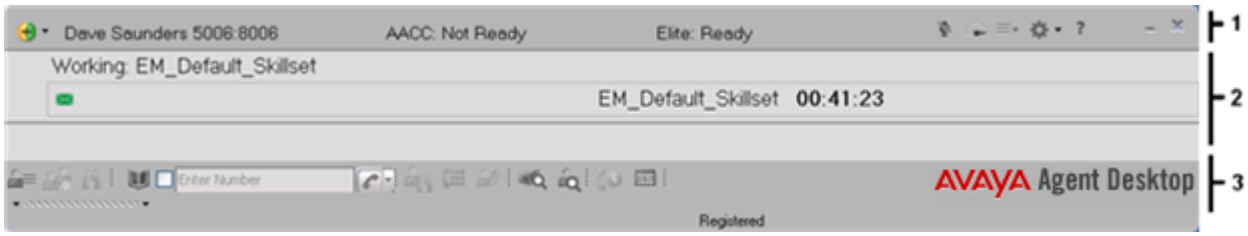


Figure 1: Example of Agent Desktop layout

1	Top bar on page 21
2	Work list window on page 22
3	Action bar on page 23

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

Work Item paradigm

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

The work list consists of work items and control buttons corresponding to the work item. The controls and functions change depending on the work list window status and available work flow

options. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

Top bar

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



Figure 2: Example of Top bar layout

The agent status icon appears on the top left corner of the Agent Desktop Top bar. In case of Elite integration, the status icon is split in half, the left half displays the status for receiving Multimedia contacts (Contact Center) and the right half displays the status for receiving Voice contacts (Elite). For example, in the image, the status icon is set to orange in the left half and green in the right half, which means that the agent is not ready to receive Multimedia contacts but is ready to receive Voice contacts.

The Top bar also displays the agent status, agent name, agent login ID, and dialable number of the agent.

The Top bar has the following icons:

Table 1: Top bar icons

Icon	Name	Description
	Mute/Unmute	Place the call on mute while using the computer (softphone) to place and receive calls. Use the same button to unmute.
	Audio Monitor	View the current audio levels used for your microphone and speakers.
	Terminal Actions	Access Emergency and Intrinsics controls.
	User preferences	Access user preferences and change audio settings for the softphone.
	Agent status	Select agent status.
	Help	Access help information.

Use the Terminal Action menu to perform the following tasks:

Table 2: Terminal Action Menu

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

Work list window

The work list window contains work items and control buttons corresponding to the work item. The controls and functions change depending on the information in the work list window. The top-right corner of the work list window has work item controls. These controls are common to all work items on the work list. When a new contact arrives, the Agent Desktop adds the new contact as a work item to the work list.

The following figure shows the work list windows and controls.

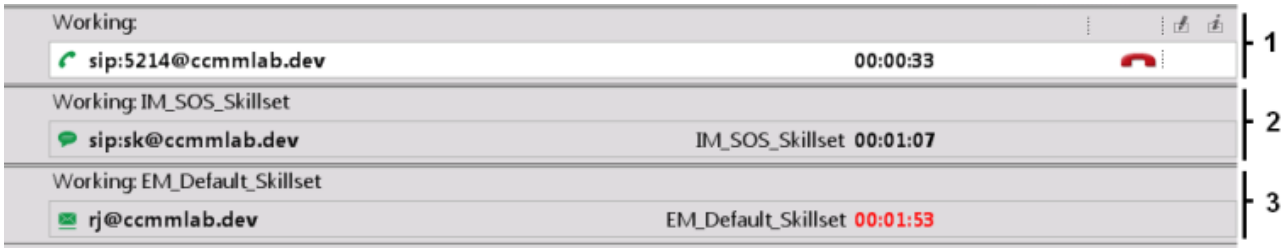


Figure 3: Example of work list layout

The illustrated work list shows three work items:

1	A voice call work item, at the top of the work list.
2	An Instant Message (IM) work item, in the middle of the work list.
3	An email work item, at the bottom of the work list. The email is on hold.

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

Work item controls:

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

Table 3: Examples of work item controls

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

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

Action bar

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



Figure 4: Example of Action bar layout

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

Table 4: Action bar commands

Icon	Name	Description
	Customer Details	View customer details.

Icon	Name	Description
	Contacts Presence	Contact presence.
	Observe	Listen in or participate in agent-customer calls or chat sessions. (Used by supervisor/agents only)
	Phonebook	Contact agents through the LDAP agent contact directory.
	Originate Call	Start a new work item.
	Supervisor	Call your supervisor.
	DTMF	Generate Dual-tone Multi-frequency (DTMF) tones.
	Call Log	Display the Call Log to view missed calls.
	Agent Greeting	Used to record an agent greeting.
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule a callback.
	Agent Statistics	Display the agent statistics scroll bar.
	Trunk Access	Number to access a trunk, generally 9.

User preferences

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

Use the Audio Settings page under the **User Preferences** menu, to adjust playback and record volume and select playback and record devices, while using the computer (softphone) to place and receive calls.

Use **Set Work Item Display** under the **User Preferences** menu, to set the size of the Work list window. The Work list window displays active work items. You can set the number of active work items you want to view in the Work list window. For more information, see Setting the Work Item Display on page 38.

Screen pops on Agent Desktop

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

Note:

In an AML-based Contact Center, intrinsics on voice calls are set for CDN calls only. In a SIP-enabled Contact Center, intrinsics on voice calls are set for both CDN and personal calls.

Administrators can use the CCMM Administration utility to configure the following types of screen pops:

- Basic Screen pops
- Advanced Screen pops

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

As administrators can configure multiple screen pops to open on a work item and assign different settings to different screen pops the behavior of screen pops varies between contact centers. For more information, see *Avaya Aura® Contact Center Server Administration* (44400-610).

Administrators can configure screen pops to open in the following three ways:

- as tabs within Agent Desktop
- external to Agent Desktop within a web browser
- as applications external to Agent Desktop

Customize Agent Desktop window settings

You can customize the following window settings of Agent Desktop:

- Window size and position.
- Window state (maximized or minimized).
- Splitter position.
- Multimedia panel state (expanded or collapsed).
- Maximum number of work items you want the Work Items panel to display. If the number of Work Items is more than the maximum you have set, Agent Desktop displays the Work Items using a scroll bar. For more information, see Setting the Work Item Display on page 38.

- Panel swapping, that is, moving the **Left Pane** of Agent Desktop to the right side of Agent Desktop and vice versa. For more information about panel swapping, see Swapping Panels in Agent Desktop on page 39.

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

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

The system saves these window settings according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center Multimedia database, and in case of a voice-only solution, the system stores the information in the local XML configuration file.

Agent Desktop system tray icon

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

Important:

The system does not display the **Avaya Aura Agent Desktop** system tray icon by default. To add the **Avaya Aura Agent Desktop** system tray icon, you must expand the Windows System Tray, select **Customize** and then select **Show icon and notifications**.

The **Avaya Aura Agent Desktop** system tray icon has a context menu that you can use to change your state in Agent Desktop to Go Ready, Go Not Ready, After Call Work, or Logged Out. When Agent Desktop is minimized, the **Avaya Aura Agent Desktop** system tray icon provides information about the state of the agent. The **Avaya Aura Agent Desktop** icon displays the state of the agent using the following icon colors: amber for Not Ready, green for Ready, blue for After Call Work, and white for Logged Out.

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

Note:

The **Avaya Aura Agent Desktop** icon is available only in an Avaya Aura® Contact Center environment and not in a Call Center Elite environment.

Shortcut keys in Agent Desktop

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

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

Agent Desktop displays the list of the shortcut keys in a tab on the **Preferences** control. For more information, see Viewing shortcut keys on Agent Desktop on page 39.

Administrators configure shortcut keys in the CCMM Administration utility. For more information, see *Avaya Aura® Contact Center Server Administration* (44400-610).

Agent Desktop Dashboard

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

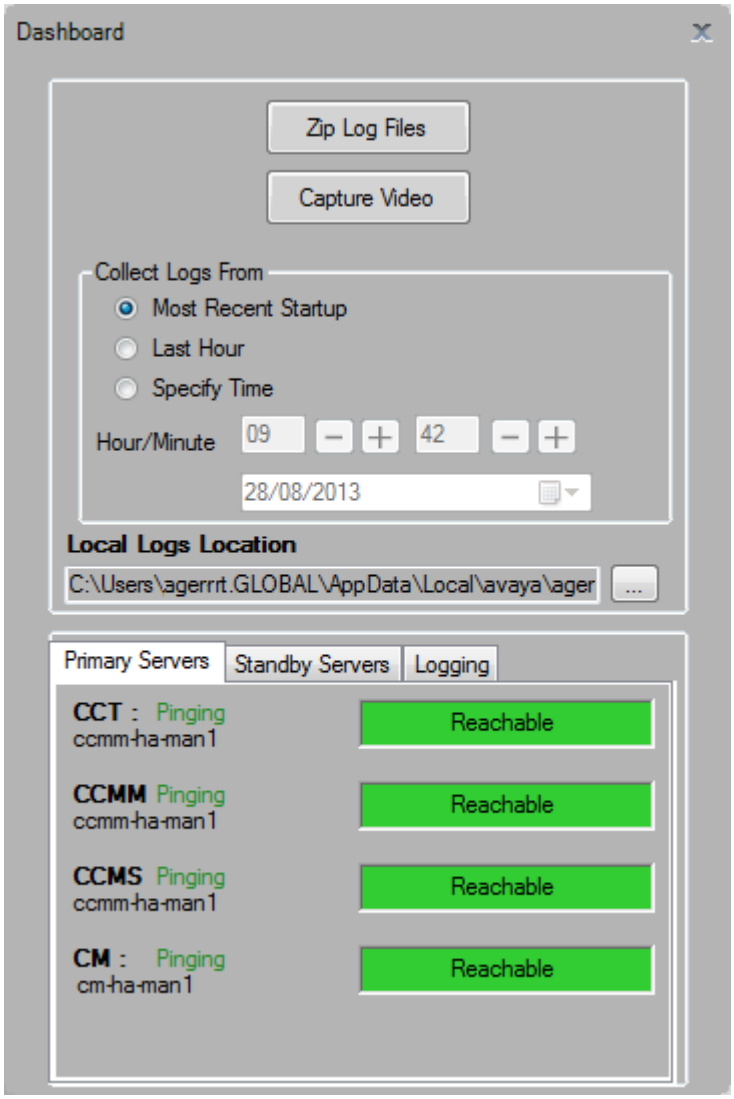


Figure 5: Example of the Agent Desktop Dashboard

Chapter 4: Using your Agent Desktop

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

Installing Agent Desktop

Before you begin

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain to use with Agent Desktop. You must also ensure that the client is joined to the appropriate domain before you use Agent Desktop.

About this task

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

Procedure

1. In Windows Explorer or Internet Explorer, type the HTTP address (URL) provided by your system administrator.

   The URL format is `<Contact Center MultiMedia Servername>/agentdesktop`.

2. Click **Launch**.

Starting Agent Desktop

Before you begin

- Ensure that you install Agent Desktop. See Installing Agent Desktop on page 29.
- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain for use with Agent Desktop.

Important:

If your contact center uses an Avaya Aura® Communication Manager, Avaya Aura® Agent Desktop client computers do not support the following applications running concurrently with Avaya Aura® Agent Desktop:

- Avaya one-X® Communicator
- IP Agent
- IP Softphone
- Any other non-Avaya softphone applications
- Avaya one-X® Agent. In a Multimedia-only Contact Center deployment, where the Contact Center agents are configured for Multimedia contact types only, running Avaya Aura® Agent Desktop concurrently with Avaya one-X® Agent on a client computer is supported.

Note:

In a SIP-enabled Contact Center, ensure no call is present on the deskphone when you launch and log on to Agent Desktop.

About this task

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

Procedure

1. In Windows Explorer or Internet Explorer, type the HTTP address (URL) provided by your system administrator.

   The URL format is `<Contact Center MultiMedia Servername>/agentdesktop`.

2. Click **Launch**.

   OR

   Click **Start** > **Programs** > **Avaya** > **Avaya Aura Agent Desktop 6.0**.

   The Agent Desktop toolbar appears. If a CCT Connection Failure message appears stating the automatic login to CCT using your Windows logon identity failed, your Windows User ID is not configured on CCT. Click **Retry** to enter valid User Credentials or click **Cancel** to exit the application.

Procedure job aid

If you log on to the Agent Desktop to handle Predictive Outbound contacts, a delay can occur before you can log on to 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 Predictive Outbound skillset, ensure that CPSEE Application server name is in the hosts file of the client machine.

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Creating a shortcut to Agent Desktop

About this task

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

Procedure

1. Click **Start** > **Programs** > **Avaya**.
2. Right-click **Avaya Aura Agent Desktop**.
3. Select **Send To** > **Desktop (create shortcut)**.

Logging on to Agent Desktop when using a desktop phone

About this task

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone (if the softphone option is available). The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Note:

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

Procedure

1. Start the Agent Desktop.
2. If you have Hot Desking enabled, type your workstation name at the prompt. Workstation based Hot Desking is supported only in Avaya Communication Server 1000 AML-based solutions.
3. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4. Click the **Telephony** tab, if available.
5. Select **Desktop Phone** from the **Place and receive calls using** drop-down list.

   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.
6. If you are configured to handle Multimedia contacts (such as email), in the **Multimedia** tab, type your **ID** and **Password**.
7. Click **Login**.

The status icon changes to Not Ready. You must be logged on to the desktop phone to handle customer calls. If you are not logged on to the desktop phone, when a customer call arrives, your agent state changes to Not Ready.

Variable definitions

Name	Description
ID (Multimedia)	Your logon ID appears in the ID box, based on your Communication Control Toolkit configuration.
Password (Multimedia)	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 on page 37. 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 Agent Desktop when using the softphone

About this task

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone (if the softphone option is available). The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Important:

If an audio device (such as a headset or microphone) is added while Agent Desktop is running, you must restart the Agent Desktop to start using the new audio device.

Procedure

1. Start the Agent Desktop.
2. If you have Hot Desking enabled, type your workstation name at the prompt.
3. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4. Click the **Telephony** tab, if available.
5. Select **My Computer** from the **Place and receive calls using** drop-down list.
6. If you are configured to handle Multimedia contacts (such as email), in the **Multimedia** tab, type your **ID** and **Password**.
7. Click **Login**.

The status icon changes to Not Ready and a My Computer (softphone) Registered message appears on the Action bar of the Agent Desktop. The Registered message means that you can now place and receive calls using your computer (softphone). Call control on the computer (softphone) is exactly the same as using a desktop phone.

Variable definitions

Name	Description
Extension	The extension number appears in the Extension box, based on your configuration.
Password	The password for the extension.
Server Address	The server address of the telephony switch. The server IP address must be configured in the Contact Center Manager Administration.
License Type	The Contact Center license type.
ID (Multimedia)	Your logon ID appears in the ID box, based on your Communication Control Toolkit configuration.
Password (Multimedia)	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 on page 37. 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 Agent Desktop for Call Center Elite Telephony

About this task

Log on to the Agent Desktop after you start the 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. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure

1. Start the Agent Desktop.

   The Agent Desktop Profile window appears.

2. Type **Agent ID** and **Password**.
3. Select the appropriate **Profile**.

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4. Select the **Auto Login** check box and click **OK** to automatically log on to Call Center Elite and Agent Desktop.

   Or

   Click **OK** to continue to log on to Call Center Elite using Agent Desktop.
5. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
6. Click the **Telephony** tab.

   The Telephony tab appears with pre-populated values based on the selected profile.
7. Select **My Computer** from the **Place and receive calls using** drop-down list.
8. Enter your **Extension** and **Password**.
9. Under Elite ACD, select the **Login to Elite** check box.
10. Type your Call Center Elite **Username** and **Password**.
11. If you are configured to handle Multimedia contacts (such as email), in the **Multimedia** tab, type your **ID** and **Password**.
12. Click **Login**.

    The Existing Login Detected window appears.
13. Click **Yes** to override the existing login association.

    The Agent Login progress bar appears. The Agent Desktop Top bar shows AACC: Not Ready and Elite: Not Ready, indicating that you are using Call Center Elite for voice calls and Contact Center Multimedia for multimedia contacts. A My Computer (softphone) Registered message appears on the Action bar of the Agent Desktop. The Registered message means that you can now place and receive calls using your computer (softphone). Call control on the computer (softphone) is exactly the same as using a desktop phone.

Variable definitions

Name	Description
Extension	The extension number appears in the Extension box, based on your configuration.
Password	The password for the extension.
Server Address	The server address of the telephony switch.
License Type	The Contact Center license type.
Login to Elite	Allows you to login to Call Center Elite ACD.
Username	Your Call Center Elite ACD username appears in the **Username** box, based on the selected profile.
Password	Password of Elite ACD.
ID (Multimedia)	Your logon ID appears in the **ID** box, based on your Communication Control Toolkit configuration.

Name	Description
Password (Multimedia)	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 on page 37. 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 Agent Desktop for Microsoft OCS or Microsoft Lync

About this task

Log on to Agent Desktop after you start the 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. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure

1. Start Agent Desktop.
2. On the Agent Desktop Top bar, from the **Status** list, select **Logged Out**.
3. In the Enter Login details window, select the **Presence** tab.
4. Select **Enable Presence Login**, and perform one of the following tasks:
   - If your user profile is configured in Microsoft Office Communications Server (OCS) or Microsoft Lync ensure that the information in the **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP** fields is correct. You must also ensure that the client is joined to the appropriate domain before you use Agent Desktop.
   - If your user profile is saved locally on the PC running Agent Desktop, click **Load profile**.
   - If you create a new user profile, enter your **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP**, and then click **Save Profile**.
5. Click **OK**.
6. If an Microsoft Office Communications Server (OCS) or Microsoft Lync client runs on the Agent Desktop PC, a warning message appears. Click **Yes** to close the Microsoft Office Communications Server (OCS) or Microsoft Lync client.

Variable definitions

Name	Description
Sign-in name	User name (for example, agent5001).
Password	Password.
Domain	The Windows domain in which the user name 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 (OCS) or Microsoft Lync server in the Domain. For example, OCS_Server.mydomain.com.
Connect using	Choose the connection protocol, TCP or TLS (more secure).

Logging on to Agent Desktop for Avaya Presence Services

About this task

Log on to the Presence Services server from the Agent Desktop after you start the Agent Desktop application. Logging on to the Presence Services server is essential if you are using the Presence Services to gather presence information for the Agent, Supervisor, and Expert.

Note:

After you log on to Agent Desktop, there can be a time lag before the Contacts Presence icon changes to an enabled state. This is because Agent Desktop must log on to the Presence Services server, which is different from the Contact Center server. The length of the time lag depends on factors such as network performance.

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

Procedure

1. Start the Agent Desktop.
2. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
3. Click the **Presence** tab.
4. Select the **Enable Presence Login** check box.

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5. If your user profile is saved locally on the PC running the Agent Desktop, click **Load saved profile**.
6. If you create a new user profile, enter the **User**, **Password**, **Server Name**, and then click **Save this profile**.
7. Click **Login**.

Variable definitions

Name	Description
Enable Presence Login	Allows you to login to the Presence Services server.
User	The username of the agent account created in the System Manager.
Password	The default password is “-”.
Server name	The server name of the Presence Services server.

Changing your password

About this task

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.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. Select the **Preferences** tab.
3. Near the bottom of the **Preferences** tab, in the **Password** section, 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 New Password** box, retype your new password.
7. Click **Save**.

Using the Agent Desktop configurable home page

About this task

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

Procedure

1. Start Agent Desktop.

   Agent Desktop opens a screen pop containing a Web page that the administrators configure.
2. Right-click the screen pop tab to close the screen pop.
3. Click the **Home Page** button on the Agent Desktop toolbar to reopen the screen pop.

Setting the Work Item Display

About this task

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

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

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. From the **User Preferences** menu, select **Set Work Item Display**.
3. From the **Set Work Item Display** menu, select the maximum number of active work items that you want the Work list window to display. You can choose from the following options:
   - **Size to show all**
   - **Show maximum of 1**
   - **Show maximum of 2**
   - **Show maximum of 3**
   - **Show maximum of 4**
   - **Show maximum of 5**

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

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

Swapping Panels in Agent Desktop

Before you begin

- Ensure that the administrators have enabled **Allow Agent Desktop Panel Swap** in the CCMM Administration utility.
- Log on to Agent Desktop.

About this task

You can move the **Left Pane** of Agent Desktop to the right side of Agent Desktop and vice-versa.

A **Swap Grip** bar has been added to the top of the left panel in Agent Desktop. You can drag and drop the **Swap Grip Bar** onto the **Swap** button to perform the panel swap.

The system saves the panel position information according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center Multimedia database, and in case of a voice-only solution, the system stores the information in the local XML configuration file.

Procedure

1. On the **Left Pane**, click the **Swap Grip** bar.

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

2. To perform the panel swap, drag and drop the **Swap Grip** bar onto the **Swap** button.

   The **Left Pane** moves to the right side of Agent Desktop.

Viewing shortcut keys on Agent Desktop

Before you begin

Log on to Agent Desktop.

About this task

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

Procedure

1. On Agent Desktop, click **User Preferences** > **Preferences**.
2. Click the **Shortcut Keys** tab.

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The system displays the list of shortcut keys.

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

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

Muting and unmuting when using the softphone

About this task

Use the mute function when you want to prevent other parties from listening to your conversation or to avoid the background noise during an active call.

Note:

The mute function is available only for the My Computer mode.

Procedure

On an active call or during a conference, perform any one of the following actions:

- To mute a call, in the Top bar, click **Mute**.

The Mute button changes to Unmute, and other parties present on the call cannot hear you speak and cannot hear any background noise.

- To unmute a call, in the Top bar, click **Unmute**.

The Unmute button changes to Mute, and other parties present on the call can hear you speaking.

Changing the audio settings for softphone

About this task

You can adjust the audio settings for recording and playback, if you are using your computer (softphone) to place and receive calls.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences** > **Audio Settings**.
2. In the **Audio Settings** tab, in the **Volume** section, adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.
3. Select the Playback **Mute** check box to eliminate any sound output through your computer speakers or headphones.
4. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your computer.

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5. Select the Record **Mute** check box to eliminate any sound being sent to your computer through the microphone.

Configuring the audio devices for softphone

About this task

You can configure the audio playback and recording hardware, if you are using your computer (softphone) to place and receive calls.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences** > **Audio Settings**.
2. In the **Audio Settings** tab, in the **Audio Devices** section, select the audio playback hardware on your local system from the **Playback Device** list.
3. Select the audio recording hardware on your local system from the **Record Device** list.
4. Click **Save Audio Devices**.

Monitoring the audio quality and VoIP traffic

About this task

The Audio Monitor window helps you in verifying the statistics of microphone, speaker, and Voice-over-IP (VoIP) traffic information. Use the Audio Monitor dialog box to determine the audio quality if the quality of your VoIP communications degrades. This procedure applies only when you are using Agent Desktop in My Computer mode.

Procedure

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

   The system displays the status of audio quality of volume and VoIP traffic information for the corresponding voice call.
2. During an active call, if you do not want Agent Desktop to transmit audio when you are not speaking, select **Silence Suppression enabled** in the **Audio Status** section.
3. Click **Close**.

Variable definitions

Name	Description
Microphone	Strength of the audio quality connected to your personal computer.
Speaker	Strength of the speaker quality connected to your personal computer.
Destination	IP address of the call destination.
Codec	A device or a computer program that converts binary signals transmitted on digital networks to analog signals converted on their analog networks.
Traffic	Amount of congestion in the network.
Discarded	Packets that were received but discarded.
Dropped	Packets that were not received.
Jitter Buffer	Packet buffer size in milliseconds (ms). The jitter buffer temporarily stores the incoming data packets in order to minimize delay variations and sends the voice packets to the voice processor in evenly spaced intervals. There can be variations in packet arrival time due to congestion in network, drift in timing, or change in routing.
Ping Delay	Time spent by the batch file waiting between two consecutive pings until a timeout.
Perceived Delay	Network delay in receiving packets in milliseconds.
Quality	Percentage of packet loss for receiving packets.
Silence Suppression enabled	Select the **Silence Suppression enabled** check box in the **Audio Status** section, if you do not want Agent Desktop to transmit audio when you are not speaking. By doing so, the system reduces the total amount of data that is sent through your network connection.

Changing your status to Ready

About this task

Change your status to Ready when you are available to create and receive contacts. In a Call Center Elite environment, you can change your status to Ready to receive Voice contacts, Multimedia contacts, or both types of contacts. This is available only for agents who use Call Center Elite Telephony.

When you change your status to Ready in a SIP-enabled Contact Center, your Contacts Presence status automatically changes to Available.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. Select **Go Ready** to create or receive both Voice and Multimedia contacts.

   In an Elite environment, select **Go Ready — Voice** to create or receive only Voice contacts.

   or

   Select **Go Ready— Multimedia** to create or receive only Multimedia contacts.

   The Agent Desktop places you in the following states:

   - If you select **Go Ready**: The status icon changes to green. In a Call Center Elite environment, the Top bar displays AACC: Ready and Elite: Ready.
   - If you select **Go Ready — Voice**: The left-hand side of the status icon changes to orange and the right-hand side of the status icon changes to green. The Top bar displays AACC: Not Ready and Elite: Ready.
   - If you select **Go Ready— Multimedia**: The left-hand side of the status icon changes to green and the right-hand side of the status icon changes to orange. The Top bar displays AACC: Ready and Elite: Not Ready.

Changing your status to Not Ready

About this task

Change your status to Not Ready when you are unavailable to receive contacts. In a Call Center Elite environment, you can change your status to Not Ready so that you do not receive Voice contacts, Multimedia contacts, or both types of contacts. This is available only for agents who use Call Center Elite Telephony.

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

When you change your status to Not Ready in a SIP-enabled Contact Center, your Contacts Presence status automatically changes to Do Not Disturb.

Your supervisor or administrator configures codes for Not Ready Reasons. Administrators define Not Ready Reason codes in Contact Center Manager Server. Not Ready Reason codes can be alphanumeric. Agent Desktop displays the Not Ready Reason codes list.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. To receive neither Voice nor Multimedia contacts, click **Go Not Ready**.

   In an Elite environment, select **Go Not Ready — Voice** to create and receive only Multimedia contacts.

Or

Select **Go Not Ready— Multimedia** to create and receive only Voice contacts.

Using Agent Desktop you can choose one of the following states:

- If you select **Go Not Ready**, the status icon changes to orange. In the Call Center Elite environment, the Top bar displays AACC: Not Ready and Elite: Not Ready.
- If you select **Go Not Ready — Voice**, the left-hand side of the status icon changes to green and the right-hand side of the status icon changes to orange. In the Call Center Elite environment, the Top bar displays AACC: Ready and Elite: Not Ready.
- If you select **Go Not Ready— Multimedia**, the left-hand side of the status icon changes to orange and the right-hand side of the status icon changes to green. In the Call Center Elite environment, the Top bar displays AACC: Not Ready and Elite: Ready.

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

Changing your status to Not Ready when on a contact

About this task

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

Procedure

1. While active on a contact, on the Agent Desktop Top bar menu click the **Status** icon.
2. Click **Go Not Ready**.
3. From the **Select or type a N/R Reason Code** drop-down list, select the Not Ready Reason code.

   The agent status changes to Not Ready on the Top bar.

   Note:

   You can also go Not Ready without selecting a Not Ready Reason code. If you go Not Ready without selecting a Not Ready Reason code, depending on the configuration set by your administrator, the agent status changes either to a Not Ready state or an ACW state.

Comments? infodev@avaya.com

Collecting and uploading log files from the Agent Desktop Dashboard

About this task

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

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. Click **Open Dashboard**.
3. If you want to collect log events for a specific time period, in the **Collect Logs From** section, select the check box for the appropriate time period .

   If you select **Specify Time**, complete the **Hour/Minute** fields.
4. On the **Dashboard** window, click **ZIP Log Files**.

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

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

Variable definitions

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

Comments? infodev@avaya.com

Checking the network connection in the Agent Desktop Dashboard

About this task

The Dashboard shows the status of the connection between Agent Desktop and the Contact Center servers. You can use this when troubleshooting, to determine whether you have an issue with your network connection. If your contact center has High Availability configured, Agent Desktop Dashboard has an additional tab for the Contact Center standby servers.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. Click **Open Dashboard**.
3. Select **Primary Servers**.
4. On the **Primary Servers** tab, review the status of the listed servers.

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

Recording a video of your agent desktop actions

About this task

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

Use this feature if a member of support staff wants to know the actions you took that resulted in an issue you encountered. If your Agent Desktop Dashboard is password protected, contact your administrator for the password.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. Click **Open Dashboard**.
3. On the Dashboard, click **Capture Video**.

   The **Dashboard** window relocates to bottom corner of the screen, so it does not interfere with the video capture. The button label changes to **Finish Recording**, and the button changes color to red.
4. Complete the actions required to reproduce the error.
5. Click **Finish Recording**.

Comments? infodev@avaya.com

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

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

Changing the Agent Desktop Dashboard log settings

Before you begin

Log on to Agent Desktop.

About this task

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

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
2. Click **Open Dashboard**.
3. Select **Logging**.
4. On the **Logging** tab, check additional logging options that you want to enable.

   Important:

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

Accessing online help

About this task

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

Procedure

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

Or

Press the `F1` key to display the online help.

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Closing contacts if you receive a force log out message

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

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

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

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

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

Understanding supervisor changes to your Ready status

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

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

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

Logging off from Agent Desktop

Before you begin

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

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About this task

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

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

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. Click **Log Out**.

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

Chapter 5: Telephony

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

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

- Accept and decline incoming contacts
- Enter an Activity code
- Enter an After Work Call Item code
- Place and release a call on hold
- Accept a CDN call by placing a DN call on hold
- Transfer a call to another party
- Conference a call
- Join two calls (if available)
- End a call
- Call a supervisor
- Make a call
- Enter DTMF Digits
- Handle an emergency
- Observe and barge-in on a voice contact or non-skillset call (supervisor/agents only)
- Call an agent using Contacts Presence
- Call an agent using the Phonebook

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

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

In a SIP-enabled Contact Center there are some telephony tasks that are not available on your agent phones. You must perform the following telephony tasks only using Agent Desktop:

- Enter activity codes

- Call a supervisor
- Observe and barge-in on a voice contact or non-skillset call (supervisor/agents only)

Important:

You must not use your desktop phone or Agent Desktop to phone, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point). For example, a Virtual Directory Number (VDN) routed to a CDN (Route Point).
- converted to a CDN (Route Point). For example, when using digit manipulation on the call server.
- call forwarded to a CDN (Route Point).

You can use your desktop phone or Agent Desktop to transfer a call, conference or phone directly to a CDN (Route Point).

Desktop phone behavior

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

- The Contact Center CDN number as the calling party.
- The name of the skillset that queued the call.

Accepting a call

Before you begin

- Ensure that you have set your status to either **Go Ready** or **Go Ready — Voice**.
- Ensure that you are assigned to a skillset for handling telephone calls.

About this task

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

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

Procedure

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

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

Declining a call

Before you begin

- Ensure that you have a skillset designated to handle telephone calls.

About this task

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

Procedure

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

Entering an Activity code

About this task

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

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

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

Procedure

1. Select the work item.
2. Click the **Activity Code** work item inline command.
3. From the **Select or type an Activity Code** drop-down list, select or type the activity code.

Comments? infodev@avaya.com

Entering an After Call Work Item Code

About this task

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

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

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

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

In an AML environment, you can use a phone to enter a code. However, if you want to enter an ACW code while you are working on a contact, you must use Agent Desktop and not a phone. If you use a phone and enter a non-ACW code, the time is not reported as ACW time or Post Call Processing time. Also, entering an ACW code or Not Ready code, while active on a contact might not be reflected correctly in reporting.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. To perform post call processing work and not receive any contacts, click **Set ACW Code**.
3. From the **Select or type an ACW Code** drop-down list, select or type the After Call Work Item code.

Placing a call on hold

About this task

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

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

Procedure

1. Select the work item.
2. Click **Hold**.

Comments? infodev@avaya.com

Releasing a call on hold

About this task

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

Procedure

1. Select the work item.
2. Click **Unhold**.

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

Accepting a CDN call by placing a DN call on hold

About this task

Place a Directory Number (DN) call on hold to interrupt your current call and accept an incoming Controlled Directory Number (CDN) call.

Note:

You must change your status to Not Ready and then change your status back to Ready in order to get the CDN call. You can get CDN calls while you are on a DN call only if the administrator assigned you a call presentation class with **Answer By Placing DN Call On Hold**.

Procedure

1. On the DN work item, click **Hold**.
2. Change your status to Not Ready and then change your status back to Ready.
3. On the Agent Desktop, select the new alerting CDN work item and click the **Accept** work item control.

Transferring a call

About this task

You can transfer a call to another agent using 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 you complete the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

Note:

The blind transfer option on Agent Desktop toolbar is disabled in a SIP-enabled Contact Center. However, you can complete the transfer before the third party answers the call (perform a blind

transfer) using the steps in this procedure. Alternatively, you can transfer the call from the main toolbar using the phone icons (this is a supervised transfer only).

Note:

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

Procedure

1. On the work item, click **Transfer**.
2. In the Transfer window, **Supervised Transfer** is automatically selected.
3. Select **Enter Value** and type the number to which you want to transfer the call.

   Or

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

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

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

Conferencing in another agent

About this task

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

Procedure

1. On the work item, click **Conference** to place the customer on hold and open the Conference window.
2. In the Conference window, select **Enter Value** and type the number of the agent to conference into the call.

   Or

   Select **Phonebook** to open Phonebook and conference in another agent using the click-to-conference feature of Phonebook.
3. Click **Conference Contact** to begin the conference.
4. Speak with the agent, if necessary, before you conference in the customer.
5. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.

Conferencing in a supervisor

About this task

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

Procedure

1. On the Agent Desktop Action bar menu, click **Supervisor** to place the customer on hold and conference in your supervisor.
2. Speak to your supervisor, if necessary, before you conference in the customer.
3. Click **Conference** again to take the customer off hold and conference in the customer and your supervisor.

Ending a call

About this task

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

Procedure

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

Calling your supervisor

About this task

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

To call a supervisor when you are on a call, see Conferencing in a supervisor on page 56.

Procedure

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

Comments? infodev@avaya.com

Making a call

About this task

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

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

Procedure

1. On the Agent Desktop Action bar menu, from the drop-down list click **Initiate Call**.
2. In the **Originate Call** text box, enter the phone number to dial.
3. Click the **Originate Call** icon.

   The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.
4. Click **Release** when you complete the call.

Using DTMF digits

About this task

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

Procedure

1. On the Agent Desktop Action bar menu, click **DTMF**.
2. Enter the numbers on the keypad that appears.

Using the Emergency key

About this task

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

Note:

Emergency key is not supported in Avaya Aura® Call Center Elite Telephony.

Comments? infodev@avaya.com

Procedure

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

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

Observing a voice contact or non-skillset call

Before you begin

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

Note:

Observing a voice contact or non-skillset call is possible only in a SIP-enabled Contact Center Contact Center.

About this task

In a SIP-enabled Avaya Aura® Contact Center, you must be a supervisor/agent to use the Observe function to listen in on a voice contact or call.

You can observe Avaya Aura® Contact Center voice contacts and non-skillset calls, except for Proactive Outreach Manager (POM) contacts. The call you want to observe must be under CTI control. That is, the agent is using Agent Desktop or a custom CTI application for handling the call. You cannot observe calls if the agent logs on only to their desktop telephone. The administrator must configure CCMA permissions to allow you to observe non-skillset calls.

Using the Observe function, you can listen in on a voice call without being heard. Using the Barge-in function, you can participate in a voice call. For more information, see Barging-in on a voice contact or non-skillset call on page 59.

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

For voice contacts, by default the agent or the customer hears a tone when you join or leave the contact. They also hear a tone repeatedly at regular intervals. The contact center administrator can customize these settings. For non-skillset calls, by default there are no observe tones. However, the administrator can configure these tones if required. Agents see an icon on Agent Desktop when you are observing their call.

When you are observing a voice contact, only the agent already interacting with the contact can set an activity code for that contact.

Important:

Many jurisdictions have legal requirements concerning observing calls: ensure you observe calls only in compliance with national and local legislation. You must familiarize yourself with and comply with all applicable laws, rules and regulations before using observe features.

Procedure

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

   The Agent Desktop displays the Supervisor Observe window.

2. Under **Filter**, select **Contact Type** from the **Item** list.
3. Select **Voice** from the **Value** list.
4. Select a voice call and click **Observe**.

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

   If you are using telecommuter mode, you have to accept the call on your phone before you can observe the voice call.

5. Click **Release** to finish observing the voice call.

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

Barging-in on a voice contact or non-skillset call

Before you begin

- Ensure that you log on to Agent Desktop.
- Ensure that you have supervisor/agent privileges.
- Ensure that you are observing an agent's voice contact or non-skillset call.

Note:

Observing and Barging-in on a voice contact or non-skillset call is possible only in a SIP-enabled Contact Center.

About this task

You can observe and barge-in on Avaya Aura® Contact Center voice contacts and non-skillset calls, except for POM contacts. The call you want to observe must be under CTI control: that is, the agent is using Agent Desktop or a custom CTI application for handling the call. You cannot observe and barge-in on calls if the agent logs on only to their desktop telephone. The administrator must configure CCMA permissions to allow you to barge-in on non-skillset calls.

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

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

For voice contacts, by default the agent and the customer hear a tone before you barge-in on the contact. For non-skillset calls, by default there is no tone; however, the administrator can configure a tone if required.

When you barge-in on a voice contact, only the agent already interacting with the contact can set an activity code for that contact.

Procedure

1. In the Supervisor Observe window, click **Barge-in**.
2. Click **Release** when your conversation is complete.

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

Observing a second voice contact or non-skillset call

Before you begin

- Ensure that you have supervisor/agent privileges.
- Ensure that you log on to Agent Desktop.
- Observe an agent's voice contact or non-skillset call.

About this task

If you have three call appearances on your telephone, you can observe two calls at the same time. You can listen to only one of these calls at a time, but you can readily toggle between them. When you are observing two calls, the agents are not aware of whether you are actively listening in on their call or not.

It is possible to barge-in to both calls; however one call is always on hold. You can participate in only one call at a time.

Procedure

1. In the Supervisor Observe window, under Filter, select Contact Type from the Item list.
2. Select Voice from the Value list.
3. Select a second voice call and click Observe.

   Agent Desktop places the call you are observing on hold, and presents a new voice contact to you. This contact connects you to the second voice call.

   If you are using telecommuter mode, you must accept the call on your phone before you can observe the voice call.
4. To switch between the two calls, select the work item for the call you are not currently observing, and click **Unhold**.

   You can listen to only one call at a time.
5. If you want to leave a call, switch to the work item for the call, ensure you are not on hold, and click **Release**.

Comments? infodev@avaya.com

Joining two voice calls

About this task

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

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

Procedure

1. Answer the first inbound voice call (from caller A).
2. Answer the second inbound voice call (from caller B).
3. On the active call (from caller B), click the Conference/Join button, and select the held or active call from the list.

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

Joining a call that you are monitoring with another call

Before you begin

- Ensure that you have supervisor/agent privileges.
- Ensure that you log on to Agent Desktop.
- Monitor an agent's voice contact or non-skillset call.

About this task

You can join a call that you are monitoring with another call. For example, you are observing a trainee agent, and you think a technical expert can help the agent with the call. You call the expert, barge into the agents' call, and then join the expert to the agent's call.

Before joining the calls, you must barge-in to the call you are monitoring. If you join a call you are observing with another call, your observe session terminates and you are not included in the joined call.

Procedure

1. On the Action Bar, dial the number of the person to whom you want to join the monitored call.

   Agent Desktop places your monitored call on hold. Wait until the person you are calling answers.

2. If you are observing the monitored call, In the Supervisor Observe window, select the monitored call and click **Barge-in**.

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3. On the work item for the monitored call , click **Conference/Join**, and select the other call from the list.

   This action joins the monitored call to the second call.

4. If you want to leave the call, click **Release**.

   The agent and the other caller that you joined can stay in the call until one of them releases the call.

Making a call while on an existing voice call

About this task

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

Procedure

1. On the Agent Desktop Action bar menu, click **Originate Call**.
2. In the **Originate Call** text box, enter the phone number to dial.
3. Click **Originate Call** again. The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.

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

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

About this task

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

Procedure

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

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

Calling an agent using Contacts Presence

About this task

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

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To call an agent from your list, click the **My Contacts** tab.

   Or

   To call an agent from an Instant Experts group, click the **CC Contacts** tab.
3. Select the name of the person you want to call, after confirming that they are available.
4. Click the **Click-to-call** icon or right-click the name of the person and click **Call**, and then click the default phone number.

   The default phone number is dialed.
5. Click **Release** when you complete the call.

Searching for a contact in Phonebook

About this task

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

Procedure

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

   The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.
2. Select the column name by which you want to search for a contact.

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

   The system displays all the visible columns of the Phonebook in the drop-down list.
3. In the search text input box, type the search text that corresponds to the field selected in the drop-down list.

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

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Calling an agent using Phonebook

About this task

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

Procedure

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

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

2. Search for a contact.

   For more information about searching for a contact, see Searching for a contact in Phonebook on page 63.

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

   The system dials the phone number stored in LDAP.

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

Filtering contacts using Phonebook

About this task

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

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

- Favorites
- Speed Dials
- Custom Contacts

You can tag a contact as favorite or add a contact to the speed dial list. For more information, see Tagging a contact in Phonebook on page 65.

Custom contacts are contacts that you add to Phonebook. For more information, see Adding a custom contact on page 66.

Procedure

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

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

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

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You can choose from the following types:

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

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

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

Tagging a contact in Phonebook

About this task

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

Procedure

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

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

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

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

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

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

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

Configuring the display of columns in Phonebook

About this task

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

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Procedure

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

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

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

   The system displays the Column Configuration window.

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

4. Click **Add >**.

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

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

6. Click **< Remove**.

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

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

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

8. Click **Save**.

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

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

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

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

    By default, the system displays 20 records per page.

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

Adding a custom contact

Before you begin

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

Comments? infodev@avaya.com

About this task

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

Procedure

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

   The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.
2. Right-click on any cell in the Phonebook grid.
3. Select **New Contact**.

   The system displays the New Contact dialog box.
4. Fill in the details for the new contact.

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

   The system adds the new contact in the Phonebook grid.

Editing a custom contact

About this task

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

Note:

You cannot edit an LDAP contact.

Procedure

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

   The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.
2. Right-click on any cell in the Phonebook grid.
3. Select **Edit Contact**.

   The system displays the Edit Contact dialog box.
4. Update the details that you need to change for the custom contact.
5. Click **Save**.

Deleting a custom contact

About this task

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

Note:

You cannot delete an LDAP contact.

Procedure

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

   The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.
2. Right-click on any cell in the Phonebook grid.
3. Select **Delete Contact**.

   The system displays a Delete dialog box.
4. Click **Yes** to confirm the deletion of the contact.

   Note:

   You can also delete a custom contact by selecting the row and pressing `Delete` on the keyboard.

Using the Call History tab

Before you begin

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

About this task

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

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

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

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

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Procedure

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

   Or

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

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

   Select one of the following:

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

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

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

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

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

   For more information, see Adding a custom contact on page 66.

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

   The system dials the phone number stored in LDAP.

   For more information, see Calling an agent using Phonebook on page 64.

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

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

   Or

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

Chapter 6: Call Center Elite Telephony

This chapter describes how to use Agent Desktop to handle incoming telephone calls from Call Center Elite.

Avaya Aura® Contact Center provides a single-interface client application to handle voice calls from Call Center Elite through a desktop phone, softphone or other phone (other phone used for Telecommuter mode only). To log on to Agent Desktop for Call Center Elite Telephony in Telecommuter mode, see *Avaya Aura® Offsite Agent User Guide* (44400-120). The Call Center Elite integration does not support Supervisor functions.

This allows you to handle voice calls and multimedia contacts from a single integrated Agent Desktop.

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

- Accept incoming calls
- Enter an activity code
- Place and release a call on hold
- Transfer a call to another party
- Conference a call
- End a call
- Make a call
- Use DTMF digits
- Call an agent using the Phonebook

Although you can use your phone to perform certain tasks, Avaya recommends that you use the Agent Desktop to perform all telephony tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting a call, placing a customer on hold, transferring a customer, and releasing a call. Do not use Feature Access Codes (FAC) on your desktop phone.

Call Center Elite agents using Agent Desktop have a pending logout status. This status occurs when an you initiate a logout while active on a call. During this pending logout status, the you retain call control on the active call, but you cannot initiate calls. When the active call ends, your status changes to Logged Out.

Important:

You must not use your desktop phone or Agent Desktop to call, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point). For example, a Virtual Directory Number (VDN) routed to a CDN (Route Point).
- converted to a CDN (Route Point). For example, when using digit manipulation on the call server.
- call forwarded to a CDN (Route Point).

You can use your desktop phone or Agent Desktop to transfer a call, conference a call, or call directly to a CDN (Route Point).

Accepting a call

Before you begin

- Ensure that you have set your status to either **Go Ready** or **Go Ready — Voice**.
- Ensure that you are assigned to a skillset for handling telephone calls.

About this task

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

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

Procedure

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

Declining a call

Before you begin

- Ensure that you have a skillset designated to handle telephone calls.

About this task

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

Note:

In an Elite integration, the status icon is split in half, the left half displays the status for receiving Multimedia contacts (Contact Center) and the right half displays the status for receiving Voice contacts (Elite). If you reject a voice call, your voice status changes to Not Ready and your multimedia status is not affected. If you reject a multimedia contact in an Elite integration, your multimedia status changes to Not Ready and your voice status is not affected.

Procedure

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

Entering an activity code

About this task

You can enter activity codes during your calls by using the **Activity Code** icon that appears on each work item. Activity codes provide a method to track the time you 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.

Your supervisor or system administrator provides activity codes. You can use alphanumeric codes. Activity codes that are defined in Contact Center Manager Administration appear on the 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 on again before you can select the new code from the list.

Activity codes are also used to enter Not Ready and Log Out reason codes. You can go Not Ready for either multimedia contacts, voice contacts, or both. You use the Agent Desktop Top bar Agent Status icon to select the relevant reason codes. When you select your status as not ready to handle multimedia contacts, the Agent Desktop Top bar shows “AACC: Not Ready (<Activity Code selected>)”. When you select your status as not ready to handle voice contacts, the Agent Desktop Top bar shows “Elite: Not Ready (<Activity Code selected>)”. When you are logging out, select the relevant Log Out reason.

The **Activity Code** icon appears on each work item, based on your Contact Center configuration. You use the **Activity Code** icon to set Work reason Activity codes. When selected, the Work reason activity code appears on the Work item.

Procedure

1. To enter a Work Reason code, select the work item.
2. Click on the **Activity Code** icon that appears on the work item.
3. In the **Activity Code** tree view, select the relevant **Activity Code** option.
4. To enter a Not Ready reason code, click the **Agent Status** icon on the Agent Desktop Top bar.
5. In the **Agent Status** tree view select **Go Not Ready** and the relevant **Activity Code** option. For example, if you are not ready to handle voice contacts select **Go Not Ready** > **Voice** and select the relevant activity code.

6. To enter a Log Out reason code, click the **Agent Status** icon on the Agent Desktop Top bar.
7. In the **Agent Status** tree view select **Log Out** and the relevant **Activity Code** option.

Placing a call on hold

About this task

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

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

Procedure

1. Select the work item.
2. Click **Hold**.

Releasing a call on hold

About this task

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

Procedure

1. Select the work item.
2. Click **Unhold**.

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

Transferring a call

About this task

You can transfer a call to another agent using a blind transfer. In a blind transfer, you transfer the call without speaking to the third party.

Note:

The blind transfer option on Agent Desktop toolbar is disabled in a SIP-enabled Contact Center. However you can complete the transfer before the third party answers the call (perform a blind transfer) using the steps in this procedure.

Note:

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

Procedure

1. On the work item, click **Transfer**.
2. Select **Enter Value** and type the number to which you want to transfer the call in the **Action bar** text box.

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

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

Conferencing in another agent

About this task

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

Procedure

1. On the work item, click **Conference**.
2. Select **Enter Value** and type the number of the agent to conference into the call in the **Action bar** text box.
3. Speak with the agent, if necessary, before you conference in the customer.
4. Click **Conference** and select the extension number again to take the customer off hold and conference in the customer and the other agent.

Ending a call

About this task

End a call when a call is completed. If your status was Ready before the call, your status is automatically set to Ready when you terminate the call. If you require time to perform call wrap-up tasks, before you accept another call, change your status to Not Ready and enter a Not Ready Reason Code in the **Code** field of the Top bar. Not Ready Reason codes are defined by the administrator.

Procedure

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

Making a call

About this task

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

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

Procedure

1. On the Agent Desktop Action bar menu, click **Originate Call**.
2. In the **Originate Call** text box, enter the phone number to dial.
3. Click **Originate Call** again.

   The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.
4. Click **Release** when you complete the call.

Using DTMF digits

About this task

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

Procedure

1. On the Agent Desktop Action bar menu, click **DTMF**.
2. Enter the numbers on the keypad that appears.

Searching for a contact in Phonebook

About this task

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

Procedure

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

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

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

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

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

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

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

Calling an agent using Phonebook

About this task

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

Procedure

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

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

2. Search for a contact.

   For more information about searching for a contact, see Searching for a contact in Phonebook on page 75.

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

   The system dials the phone number stored in LDAP.

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

Filtering contacts using Phonebook

About this task

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

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

- Favorites
- Speed Dials
- Custom Contacts

You can tag a contact as favorite or add a contact to the speed dial list. For more information, see Tagging a contact in Phonebook on page 77.

Custom contacts are contacts that you add to Phonebook. For more information, see Adding a custom contact on page 79.

Procedure

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

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

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

   You can choose from the following types:

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

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

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

Tagging a contact in Phonebook

About this task

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

Note:

The system saves information about tagged contacts according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center Multimedia database and in case of a voice-only solution, the system stores the information in a local XML file.

Procedure

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

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

2. In the Phonebook grid, select the row for the contact that you want to tag and right-click the row.
3. Select **Favorite** or **Speed Dial**.

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

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

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

Configuring the display of columns in Phonebook

About this task

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

Note:

The system saves the changes that you make to the Phonebook display setting according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center Multimedia database and in case of a voice-only solution, the system stores the information in the local XML file.

Procedure

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

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

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

   The system displays the Column Configuration window.

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

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

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

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6. Click **< Remove**.

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

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

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

8. Click **Save**.

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

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

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

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

    By default, the system displays 20 records per page.

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

Adding a custom contact

Before you begin

You can create custom contacts only if administrators have enabled creating custom contacts in the CCMM Administration utility.

About this task

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

Note:

The system saves information about custom contacts according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center Multimedia database and in case of a voice-only solution, the system stores the information in the local XML configuration file.

Procedure

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

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

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

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3. Select **New Contact**.

   The system displays the New Contact dialog box.

4. Fill in the details for the new contact.

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

5. Click **Save**.

   The system adds the new contact in the Phonebook grid.

Editing a custom contact

About this task

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

Note:

You cannot edit an LDAP contact.

Procedure

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

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

2. Right-click on any cell in the Phonebook grid.
3. Select **Edit Contact**.

   The system displays the Edit Contact dialog box.

4. Update the details that you need to change for the custom contact.
5. Click **Save**.

Deleting a custom contact

About this task

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

Note:

You cannot delete an LDAP contact.

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Procedure

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

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

2. Right-click on any cell in the Phonebook grid.
3. Select **Delete Contact**.

   The system displays a Delete dialog box.

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

   Note:

   You can also delete a custom contact by selecting the row and pressing `Delete` on the keyboard.

Using the Call History tab

Before you begin

- You can view the call history only if administrators have enabled call logging in the CCMM Administration utility.
- You can delete the call history only if administrators have enabled **Allow Agents to erase the Call Log** in the CCMM Administration utility.

About this task

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

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

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

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

Note:

The system saves the call history information according to your Contact Center configuration. In case of a multimedia solution, the system stores the information in the Contact Center

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Multimedia database and in case of a voice-only solution, the system stores the information in the local XML configuration file.

Procedure

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

   Or

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

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

   Select one of the following:

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

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

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

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

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

   For more information, see Adding a custom contact on page 66.

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

   The system dials the phone number stored in LDAP.

   For more information, see Calling an agent using Phonebook on page 64.

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

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

   Or

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

Chapter 7: Proactive Outreach Manager

This chapter describes how to handle Proactive Outreach Manager contacts using Avaya Aura® Agent Desktop.

Avaya Aura® Contact Center supports integration with Avaya Proactive Outreach Manager (POM) to provide agents with a single desktop experience for inbound and outbound contacts. Integration with POM also provides blending and reporting of outbound activities.

POM provides a capability to dynamically predict the availability of a Contact Center agent and to pace outbound calls accordingly. This type of dialing can be used in Contact Centers where there is a requirement to efficiently contact large volumes of customers. A predictive dialer uses a combination of current information and historical statistics to determine how frequently an agent becomes available within the Contact Center. Based on this, POM launches calls in anticipation of the agent becoming imminently available. Calls are connected to the agent only when a customer answers a call.

When you log on to Agent Desktop, POM initiates a voice path (or nail-up) call to the agents extension. Agent Desktop automatically answers this nail-up call. If you accidentally release the nail-up call, POM detects this and automatically reestablishes the nail-up call.

You can use POM to perform the following tasks on Agent Desktop:

- Accept incoming contacts
- Reject incoming contacts
- Preview contacts
- Place a call on hold
- Transfer a contact
- Conference a contact
- Release a contact
- Disposition a contact
- Schedule a callback
- Redial a customer

The presentation of POM contacts on Avaya Aura® Agent Desktop depends on the dialing mode of the POM campaign. POM supports Predictive, Progressive, and Preview dialing modes.

Predictive/Progressive dialing mode

Contacts dialed predicatively or progressively present to the agent on Agent Desktop in a similar way. The Customer Details pane displays customer information, and populates before the POM

campaign script loads. This script is Web-based and is hosted on the POM server - the URL is passed as a parameter of the contact. The actions available to an agent while on a contact depend on the POM configuration when sending the contact. For example, call transfer or agent conference might not be available depending on POM configuration.

In Predictive dialing mode, POM does not display the customer details and campaign script on Agent Desktop until the customer is successfully dialed. By this time, the agent is active on the voice call. In Progressive dialing mode, POM reserves the agent until the customer is successfully dialed. Progressive dialing prevents the system from dialing calls that exceed the number of idle agents. At this point, the agent experience is similar to a predictatively dialed contact - the agent is alerted to the contact and the customer details and campaign script are displayed. During the POM reservation period, the agent experiences idle time.

Preview dialing mode

In Preview dialing mode, Agent Desktop presents a dialog box to the agent before the contact is presented to the agent. The dialog box lists the available contact numbers on the customer record, with the default number highlighted. If configured on the preview campaign, the dial time also appears on the dialog box. If the campaign is configured without dial time, the agent can select the number to dial and can cancel the dial attempt. There is no time limit imposed on the agent.

Preview contacts with dial time present to the agent by first displaying the customer information and campaign script. A dialog box appears listing all phone numbers associated with the customer. The default phone number is highlighted. The agent can highlight an alternate number for dialing. If the timer expires, POM dials the highlighted number and agents cannot change the highlighted number or cancel the dial attempt. Depending on the POM campaign configuration, agents can reject the contact before the dial attempt is made.

Preview contacts without dial time also present to the agent by first displaying the customer information and campaign script. A dialog box also appears listing all phone numbers associated with the customer. The default phone number is highlighted. The agent dials the number at the time of their choosing and, depending on the POM campaign configuration, agents can reschedule or reject the contact.

Agent blending

Blending allows agents to move from outbound to inbound activities (and back again), if configured. Agent Desktop notifies agents, by means of a message box, that they are moving to Inbound activities. If the agent is on an Inbound call and they are selected to blend back to Outbound activities, their status changes to Not Ready. After the Inbound call is released, the agent immediately blends back to Outbound and their status automatically changes to Ready.

Note:

You must use Agent Desktop to perform all telephony tasks, such as conference and transfer.

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Prerequisites

Procedure

- Configure the hardware and software required to use the POM feature. For more information, see *Avaya Aura® Contact Center — Proactive Outreach Manager integration guide* (44400-515).
- Ensure you assign all POM agents to POM skillsets.
- If Microsoft Internet Explorer Enhanced Security is enabled on your computer, you must add the POM server to the list of trusted sites.

Logging on to Agent Desktop for POM

About this task

Log on to Agent Desktop for POM after you start Agent Desktop. While you log on, you can choose between a desktop phone and a softphone based on your usage mode. The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured.

Procedure

1. Start Agent Desktop.
2. If you have Hot Desking enabled, type your workstation name at the prompt.
3. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4. Click the **Telephony** tab.
5. Select **Desktop Phone** or **My Computer** from the **Place and receive calls using** drop-down list.
6. Click the **Multimedia** tab.
7. Type your **ID** and **Password**.
8. From the **Zone** list, select the appropriate zone to log on to.

   Note:

   Ask your supervisor what the appropriate Zone is.
9. Click **Login**.

   The status icon changes to Not Ready.

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Handling a Predictive or Progressive call

Before you begin

- Ensure your status is Ready.

About this task

Agents handle Predictive and Progressive calls in a similar way. Predictive and Progressive calls are presented on Agent Desktop automatically. The customer call is active and the customer details and campaign script appears on your Agent Desktop.

In Progressive dialing mode, POM reserves the agent until the customer is successfully dialed. During this reservation period, the agent experiences idle time. When the reservation period finishes, Agent Desktop presents the contact as described above.

Procedure

Respond to the customer call when Agent Desktop presents it to you.

Handling a Preview call

Before you begin

- Ensure your status is Ready.

About this task

Calls in Preview mode allow you to preview a call before you or the system dials the customer number. There is a predefined time period, configured by the POM administrator, in which you need to preview the contact information. Before this time period expires, you can select which customer phone number to dial, enter an alternative phone number to dial, reschedule the contact, or cancel the contact. You can also extend the time period. The availability of these options depends on the settings defined by the POM administrator

When the preview time period expires, the system dials the customer's number and Agent Desktop presents the contact to you.

Procedure

1. Preview the customer details and the campaign script that appears on Agent Desktop.

   At this point, your agent status is Preview. On the **Preview** dialog box, the **Time Remaining** begins to expire.

2. You can perform one of the following actions, if the administrator allows:
   - Select one of the customer's phone numbers from the **Preview** dialog box, and click **Dial** to call the customer.
   - In the **Number to dial** box, type an alternative customer phone number to dial, and click **Dial**.
   - Click **Cancel** to cancel the contact.

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- Click **Reschedule** to schedule a callback. For more information, see Rescheduling a call on page 90.
- Respond to the call when the Preview time period expires and Agent Desktop presents the call to you.

Releasing and dispositioning a call

About this task

When you release a customer call, your status changes to Wrapup and you can disposition the call using the Disposition Form. You have a certain period of time (determined by the administrator) in which to complete your after-call work. If you do not disposition the call in the specified period of time, the call is dispositioned with a default disposition code (defined by the POM administrator).

Procedure

1. On the customer call on Agent Desktop, click **Release**.

   The customer call is disconnected and the agent status changes to Wrapup.

2. To request additional time (additional to the time already allowed) to complete your after-call work after you release the call, on the Agent Desktop work list window, click **Change Work Completion** > **Request more time**.

   Additional time, defined by the POM administrator, is allowed for after-call work. You can request more time once only.

3. To disposition a customer call, on the Agent Desktop work list window, click **Disposition**.

   The **Disposition Form** appears.

   Note:

   If you click **Disposition** while active on a customer call, the customer call is disconnected, the agent status changes to Wrapup, and the **Disposition Form** appears.

4. On the **Disposition Form**, under Disposition Code, select a disposition code and click **Disposition**.

   All information related to the previous call clears from Agent Desktop and the agent status changes to Ready.

   Note:

   The **Extend** button on the **Disposition Form** performs the same action as clicking **Change Work Completion** > **Request more time** on the work list window.

Transferring a call

Before you begin

- Ensure the agent to whom you want to transfer a call can handle a POM call.

About this task

On an active customer call, you can transfer the call to another user. When the agents clicks **Transfer**, a **Transfer** dialog box appears. You can select an agent or a phone number and click **Consult**. This places the customer call on hold and sends a request to connect to the agent (or phone number).

Note:

If you select **Agent** as the transfer type, the list includes only agents that are logged in, Ready, and currently have a nail-up call.

Procedure

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

   The **Transfer** dialog box appears.

2. Under **Options**, select **Agent** or **Phone**, and select the agent to transfer the call to.

   OR

   Type a valid agent phone number in the **Number to Dial** field.

3. Click **Consult**.

   If the requested agent is available, a Consult work item appears on both work list windows and a voice connection is established between the originating agent and the consulted agent. The customer is placed on hold. Both agents are Ready.

   If the requested agent is on a customer call, the originating agent’s customer call is placed on hold and a Pending Consult work item appears on both work list windows. When the requested agent completes the Active call, the Pending Consult work item automatically changes to Consult and a voice connection is established between the originating agent and the consulted agent. Both agents are Ready.

4. Speak to the consulted agent and provide any information needed before transferring the call.

5. Click **Transfer**.

   The transfer is completed. If the call is transferred to another agent, the originating agent's status is set to Ready and the consulted agent status is set to Active.

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Conferencing in another agent

Before you begin

- Ensure the agent to whom you want to conference into a call can handle a POM call.

About this task

On an active customer call, you can conference in another user. When the agents clicks **Conference**, a Conference dialog box appears. You can select an agent or a phone number and click **Consult**. This places the customer call on hold and sends a request to connect to the agent (or phone number).

Note:

If you select **Agent** as the conference type, the list includes only agents that are logged in, Ready, and currently have a nail-up call.

Procedure

1. On the Agent Desktop work item, click **Conference**.

   The **Conference** dialog box appears.

2. Under **Options**, select **Agent** or **Phone**, and select the agent to conference into the call.

   Important:

   You must select the agent from the agent list. Do not type the agent's number in the **Number to dial** field.

3. Click **Consult**.

   If the requested agent is available, a Consult work item appears on both work list windows and a voice connection is established between the originating agent and the consulted agent. The customer is placed on hold. Both agents are Ready.

   If the requested agent is on a customer call, the originating agent's customer call is placed on hold and a Pending Consult work item appears on both work list windows. When the requested agent completes the Active call, the Pending Consult work item automatically changes to Consult and a voice connection is established between the originating agent and the consulted agent. Both agents are Ready.

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 status of the originating agent is set to Conference (Owner) and the consulted agent's status is set to Conference (Participant). Both agents can view the customer details and campaign script on Agent Desktop. The Conference Owner can place a conference call on hold. If the Conference Owner clicks Hold while on a conference call, the customer is placed on hold. The Conference Owner and Conference Participant remain active on the call.

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Ending and leaving a conference call

About this task

Release a customer call, and depending on the call and agent state, change ownership or leave a conference call. A three-way conference includes the customer, the conference owner, and a conference participant.

Procedure

On the conference call work item, click **End Conference**.

The conference participant is disconnected from the call and the status of the conference owner changes to active — this agent remains active on the customer call until it is released.

Example

Table 5: Options when ending a conference call

POM status	Options available
Conference (Owner)	• Change Ownership: This changes ownership of the conference call. The Owner becomes a Participant, and the Participant becomes the Owner. • End Conference: This ends the conference — the conference participant is disconnected from the call.
Conference (Participant)	• Leave Conference: The conference participant is disconnected from the call.

Rescheduling a call

About this task

POM agents can reschedule a preview call by creating a customer callback. Agents choose from three different callback options:

- Standard: At the specified time, POM presents the callback to any available POM agent.
- Agent: Agents choose whether POM presents the callback to themselves or another POM agent. At the specified time, POM checks if the selected agents is logged in and is performing outbound activities. If the agent is unavailable, POM presents the callback to the agent when available.
- Campaign: Agents choose the campaign that the callback is presented to. At the specified time, POM checks if the selected campaign is running. If the campaign is running, POM presents the callback to any agents assigned to the campaign.

Agents can specify an expiry time on all callback options. If no POM agents are available and the expiry time elapses, the callback expires.

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Note:

POM presents all callbacks in Preview dialing mode.

Procedure

1. On the **Preview** dialog box of the customer call you want to reschedule, click **Reschedule**.

   The **Schedule Callback** dialog box appears.
2. On the **Schedule Callback** dialog box:
   - From the **Phone** list, select a customer phone number to call.

     OR
   - In the **Number** box, type the customer phone number to call.
3. From the **Timezone** list, select the timezone of the scheduled callback.
4. Select **Agent Local Time** to schedule the callback in your own local time, or select **Customer Time** to schedule in the customer's time.
5. Under **Callback Start**, from the **Date** list, select the date of the scheduled callback.
6. In the **Time** box, enter the time of the scheduled callback.
7. Under **Callback Expiry**, from the **Date** list, select the expiry date of the scheduled callback.
8. In the **Time** box, enter the expiry time of the scheduled callback.

   Note:

   The default expiry time is set to 30 minutes after the scheduled callback time. You can change this default time.
9. Under **Type**, select the type of callback to schedule.
10. If you select **Standard**:
    a. In the **Memo** box, type an optional callback description.
    b. Skip to Step 13 on page 91.
11. If you select **Agent**:
    a. Select one of the available POM agents to present the callback to.
    b. In the **Memo** box, type an optional callback description.
    c. Skip to Step 13 on page 91.
12. If you select **Campaign**:
    a. Select one of the available POM campaigns to present the callback to.
    b. In the **Memo** box, type an optional callback description.
    c. Skip to Step 13 on page 91.
13. Click **OK**.

Redialing a customer

About this task

Redial a customer if a call is unexpectedly disconnected. When a call is unexpectedly disconnected, the agent is in an after-call work period.

Procedure

1. To redial a customer, after the call is disconnected, click the **Originate Call** button.

   The **Select Destination** dialog box appears with the disconnected customers contact details listed.

2. On the **Select Destination** dialog box, perform one of the following actions:
   - Select one of the customer's phone numbers from the **Destination** list, and click **Dial** to call the customer.
   - In the **Number to Dial** box, type an alternative customer phone number to dial, and click **Dial**.

   Note:

   If the redial attempt fails, Agent Desktop restarts the after-call work timer.

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Chapter 8: Outbound calls and callbacks

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

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

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

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

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

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

You can also use Agent Desktop to create a callback. Both customers and agents can create scheduled callbacks. If your Contact Center is licensed for Web communications, a customer can request a call from an agent through a Customer Interface 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. The Schedule Callback feature is available only if your Contact Center is licensed for outbound contacts. However, a scheduled callback is not associated with an outbound campaign.

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

Accepting an outbound contact

Before you begin

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

About this task

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

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

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

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

Procedure

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

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

Declining an outbound contact

About this task

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

Procedure

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

Placing an outbound call

Before you begin

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

About this task

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

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

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

- Verify customer information. After you successfully place the call, confirm that you have reached the correct customer by reviewing the contact information with the customer.
- Follow the script or complete the questionnaire, if applicable.
- Complete the call and assign a disposition code. Schedule a callback if required, enter applicable notes, and save the call results.

Procedure

1. On the Agent Desktop Action bar menu, click the **Initiate Call** button.
2. In the Enter Destination window, click the **Originate Call** icon to dial the default customer telephone number.
3. If you get to speak with the customer, proceed with the call using a script, if applicable.
4. If you do not get to speak with the customer, record the result of the call to update the contact with the appropriate disposition code, reschedule the call, and add applicable notes, if required.
5. Verify the customer information and update customer contact fields, if required.

Using a script

About this task

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

Note:

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

Procedure

1. On the Agent Desktop, click the **Call Script** tab.
2. Read the introduction to the customer.
3. Read each question present in the script to the customer.

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4. Record the customer responses by using one of the three methods defined on the **Call Script** tab (the customer responses are saved automatically):
   - Select an option from the list. Depending on the outbound campaign, you can read the options to your customer and then select the option based on the customer's response.
   - Select an option.
   - Type the customer comments in a text box.
5. To disconnect from the call, click **Release**.

Recording the result

About this task

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

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

Procedure

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

Ending the call

About this task

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

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

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

Procedure

Click **Finish**.

Scheduling a callback

Before you begin

- Identify a customer for a scheduled callback.

About this task

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

Note:

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

Procedure

1. Click **Schedule Callback**.
2. In the Schedule Callback window, select a skillset from the list to direct the contact to the agent with the most appropriate skills.
3. Select either an active agent for the call, or choose a specific agent from a list of all agents.
4. In the **Subject** box, type a subject for the callback.
5. In the **Time** box, select the time to perform the callback.
6. In the **Date** box, select the date to perform the callback.

   The dates appear according to the configuration set by your administrator.
7. In the **Reason** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Reason** box.
8. Click **Send**.

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

Calling the customer manually

Before you begin

- Ensure that you are assigned to an outbound skillset.

About this task

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

Procedure

1. When the contact is presented to your desktop, click **Accept**.
2. On the Agent Desktop Action bar menu, click **Initiate Call** to dial the default customer telephone number, which is displayed in the text box beside the **Initiate Call** button.
3. In the Enter Destination dialog box, click the **Originate Call** icon to dial the default customer telephone number.
4. When you complete the call, click **Release**.
5. If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.

Chapter 9: Predictive Outbound

This chapter describes how to handle Predictive Outbound contacts using the Avaya Aura® Agent Desktop.

Administrators create Outbound campaigns using the customer database, custom scripts, and Predictive Outbound settings that determine how calls are presented to agents with Predictive skillsets. Based on how the Administrator configures the campaign, calls can be dialed by the system or by the agent and presented to the agent either immediately or with a specified amount of time during which the agent can preview the contact.

The Predictive Outbound feature requires additional hardware and software.

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
- Transfer a contact to another agent, skillset or work session
- Conference a contact (call and data)
- End a contact (call and data)
- Schedule a callback

There are five dialing options in Predictive Outbound for delivering contacts to the Agent Desktop. The dialing option used is determined by the administrator during configuration of the campaign and routing the contact to the Agent Desktop. The five dialing options are as follows:

- Predictive: Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer simultaneously receives the call. The agent cannot cancel the contact or dial the number.
- Paced: Contact Center presents a record to the agent for review while the customer's number 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. The agent can cancel the contact or manually dial the number, before the configured period of time expires.
- 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 simultaneously receives the call. 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. There is no time limit specified. The agent can cancel the contact or manually dial the number.

Note:

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

Prerequisites for Predictive Outbound

Procedure

- You must have configured the hardware and software required to use the Predictive Outbound feature.
- You must have configured agents with Predictive skillsets.
- If Microsoft Internet Explorer Enhanced Security is enabled on your computer, you must add the Predictive Outbound application server to your list of trusted sites.

Changing to Ready status

About this task

Change your status to Ready after you log on to Agent Desktop and are ready to accept contacts.

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
2. Click **Go Ready**.

   The agent status changes to Ready.

Procedure job aid

Table 6: Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Not Ready	The agent cannot receive contacts. This is the initial status following the agent log on.	Click Ready. Log off Agent Desktop.

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Predictive Outbound status	Description	Actions Allowed
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.
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 disconnects • the contact disconnects • the DN disconnects	Click Disposition, Originate, Callback, Not Ready (pending), or Hangup (if a secondary call is connected).
Talk Customer Hold	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).

Changing to Not Ready status

Before you begin

- Ensure that you have no active contact.

About this task

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

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
2. Click **Go Not Ready**.

   The agent status changes to Not Ready.

Changing to Not Ready status when on a contact

Before you begin

- Ensure that you have an active contact.

About this task

Change your status to Not Ready, while still on a contact to indicate that you are not ready to accept contacts when the current contact is completed.

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
2. Click **Go Not Ready**.

   The button changes to Not Ready and Not Ready appears in title bar.

Handling a Predictive or Progressive call

Before you begin

- Ensure that your status is set to Ready.

About this task

Agents use the same procedure for handling a Predictive or Progressive call. 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 appears on your Agent Desktop.

Procedure

Respond to the call when it is presented to you.

Your agent status is Talking.

Handling a Paced call

Before you begin

- Ensure that your status is set to Ready.

About this task

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.

Procedure

1. Preview the customer details and the call script that appear on the Agent Desktop.

   Your agent status is set to Preview (Paced).

2. Respond to the call when it is presented to you.

   Your agent status is Talking.

Handling a Preview call

Before you begin

- Ensure that your status is set to Ready.

About this task

Handling a Preview call enables you to preview a call before you or the system dials the customer’s phone number. You have a predefined time period in which you need to preview the contact information. 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's number and presents the contact to you.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.

   Your agent status is set to Preview. The count down of the Preview time begins and the time remaining is displayed in the Preview Contact dialog box.

2. Choose one of the following actions:

   - Select one of the customer's phone numbers from 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 set to Talking. If you cancel the contact, your agent status is set to Ready.

Handling a manual call

Before you begin

- Ensure that you have set your status to Ready.

About this task

Handling a manual call uses a procedure similar to handling a preview call. However, a manual call is handled through the phone switch and not through the Predictive Outbound features.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.

   Your agent status is set to Preview (Manual).

2. Choose one of the following actions:

   - Select the phone number of one of the customer's 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.

Cancelling a call

Before you begin

- Ensure that your status is set to Ready.
- Ensure that you have a Predictive skillset designated for handling telephone calls.

About this task

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.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.

   Your agent status is Preview or Preview (Manual).

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2. In the Preview Contact dialog box, click **Cancel**.

   The contact is returned to the queue.

Transferring a call

Before you begin

- Ensure that the agent to whom you want to transfer a call has a Predictive skillset designated for handling telephone calls.
- Ensure that the agent to whom you want to transfer a call has the status set to Ready.

About this task

You can transfer a call to another agent in your Contact Center. Transferring a call requires several steps, particularly if the agent to whom you want to transfer a call does not have the status set to Ready, 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 events occur:

- If the requested agent is not logged on, 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 on, but does not have the status set to Ready, 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 on, but does not have the status set to Ready, and does not become available after 60 seconds, the request gets timed 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.

An agent with Predictive Outbound skillsets can encounter the following scenario during a call transfer:

- If an agent in a Predictive Outbound skillset performs 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 completing the transfer.

Procedure

1. On the Agent Desktop Predictive Outbound Voice Path work item, click **Transfer**.
2. In the Transfer dialog box, select whether 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.

Note:

In the Manual mode, if you press the **Transfer/Conference** buttons on the phone, the Transfer/Conference dialog box does not appear on the Agent Desktop 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 set to Talk Customer Hold. The consulted agent's status is set to Voice Only.

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's status is set to Ready and the consulted agent status is set to Talking. If the call is transferred to an external party, the originating agent's status is set to Wrapup.

Conferencing in another agent

Before you begin

- Ensure that the agent to whom you want to transfer a call has a Predictive skillset designated for handling telephone calls.
- Ensure that the agent to whom you want to transfer a call has the status set to Ready.

About this task

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 with does not have the status set to Ready, when you make the initial request. 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 events occur:

- If the requested agent is not logged on, 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 on, but does not have the status set to Ready, 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. 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 set to Conferenced (Owner). The consulted agent's status is set to Conferenced (Passive).
- If the requested agent is logged on, but does not have the status set to Ready, and does not become available after 60 seconds, the request gets timed 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 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 a Predictive Outbound skillset initiates 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.

Procedure

1. On the Agent Desktop work item, click **Conference**.
2. In the Conference dialog box, select whether to conference the 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.

   Note:

   In the Manual mode, if you press the **Transfer/Conference** buttons on the phone, the Transfer/Conference dialog box does not appear on the Agent Desktop 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 set to Talk Customer Hold. The consulted agent's status is set to Voice Only.
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 status of both the originating agent and the consulted agent is set to Talking.

Hanging-up and leaving a conference call

About this task

Hang up on a call with the customer, and depending on the call and agent state, leave a conference call with another agent.

Procedure

On the Agent Desktop, Predictive Outbound voice path work item, click **hangup/leave conference**.

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The agent gets disconnected from the call.

Procedure job aid

Table 7: Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The agent is disconnected from the customer and the agent's status is set to Wrapup.
Wrapup (available if a second call is connected)	The call is disconnected.
Talk Customer Hold (available for an agent who initiated a consultation and placed the customer on hold)	The agent being consulted is disconnected. The agent who initiated the consultation is reconnected with the customer and the agent's status returns to Talking.
Voice Only (available for an agent being consulted)	The agent being consulted is disconnected and the agent's status returns to Ready. The agent who initiated the consultation remains connected with the customer.
Conferenced (Passive) (available for an agent who has been conferenced)	The agent being consulted is disconnected. The agent who initiated the consultation remains connected with the customer.
Conferenced (Owner)	The agent is disconnected from both parties and the control of the call is passed to the agent who is being consulted.
ConferencedExt (Owner) (available for an agent that initiated a conference)	The agent is disconnected from the external party and the customer. However, the agent who initiated the consultation requires to add the disposition for the contact.

Ending a contact

About this task

End a contact with the customer.

Procedure

1. On the Agent Desktop, Predictive Outbound voice path work item, click **hangup/leave conference**.

   The agent gets disconnected from the call.

2. Click **Disposition Contact**.

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3. Select a disposition code from the Disposition Codes dialog.
4. Click **OK**.

   If the customer call is still connected both the contact and the customer call are disconnected.

Procedure job aid

Table 8: Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The Disposition Codes dialog box appears.
Wrapup	The Disposition Codes dialog box appears.
Conferenced (Owner)	The Disposition Codes dialog box appears.
ConferencedExt (Owner)	The Disposition Codes dialog box appears.

Originating a call

Before you begin

- Ensure that your status is set to Wrapup.

About this task

You can originate a call to a customer when your status is set to Wrapup.

Procedure

1. Click **Initiate a Call**.
2. Select one of the customer's phone numbers from the **Select Destination** box.

   OR

   Manually type the phone number in the **Number To Dial** box.
3. Click **Dial**.

Scheduling a callback

Before you begin

- Ensure that you have a Predictive skillset designated to handle telephone calls.

About this task

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

Procedure

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 is based on the **Agent Local Time** or the **Customer Time**.
4. Select one of the customer's phone numbers from 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 it is required for the callback.
8. Click **OK**.

Variable definitions

Schedule Callback fields

Name	Description
Date	Date for the scheduled callback.
Time	Time for the scheduled callback. The default for the scheduled callback is the current Contact Center time plus 20 minutes.
Agent Local Time or Customer Time	The location where the Date and Time apply. Select **Agent Local Time** to use the Date and Time of the Contact Center for the callback. Select **Customer 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 is 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.

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Name	Description
Type	Type of callback or Predictive Outbound campaign. The type selected determines the Agent and Team names that you can select. 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.
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 appears at the bottom of the call script when the callback contact is presented to an agent.

Handling a standard callback call

Before you begin

- Ensure that your status is set to Ready.
- Ensure that the work session on CPSEE Application server is active.

About this task

Handling a Standard callback call is similar to handling a normal call in each mode of predictive outbound calling (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 automatically delivered to your Agent Desktop. 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, cancel or dial the customer's phone number, if the contact presented to you is a Preview or manual contact.

Procedure

Respond to the call when it is presented to you.

Your agent status is set to Talking.

Handling a non-standard callback call

Before you begin

- Ensure that your status is set to Ready.

About this task

Handling a non-Standard callback call is similar to handling a Preview call. 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

For any of these callback call types you can preview a call before you or the system dials the customer’s phone number. You have a predefined time period in which you need to preview the contact information. 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's number and presents the contact to you.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.

   Your agent status is set to Preview Callback. The count down of the Preview time begins and the time remaining is displayed in the Preview Contact dialog box.

2. Choose one of the following actions:

   - Select one of the customer's phone numbers from 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's number, your agent status is set to Talking. If you cancel the contact, your agent status is set to Ready.

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Handling a closed zone or priority callback call

About this task

A contact is presented to an agent as a result of a closed zone or priority callback. A closed zone or priority callback call is automatically delivered to your Agent Desktop. The customer details and call script (including any memo notes entered when the callback was created) appear on your Agent Desktop. You can preview, reschedule or dial the customer's phone number.

Handling a closed zone or priority callback call is similar to handling a Preview call. However, there are differences:

- The call can contain memo text.
- The call includes a reschedule option to reschedule the callback for a later date.
- The call does not have a cancel option.
- The call does not have a preview time.

Procedure

Respond to the call when it is presented to you.

Your agent status is set to Talking.

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Chapter 10: Email

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

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

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

Important:

Contact Center limits the **To**, **CC**, and **BCC** fields to 4096 characters. If you exceed this limit, Agent Desktop truncates the address fields.

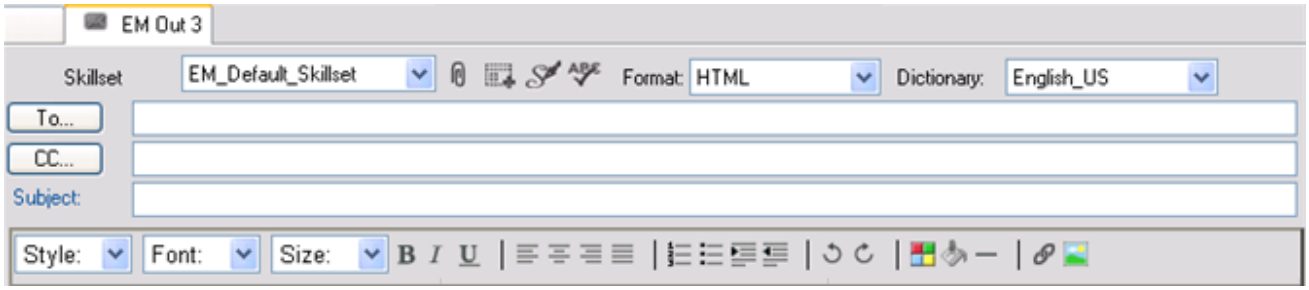


Figure 6: Example of the email toolbar

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

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

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

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

The following table describes the email feature buttons:

Table 9: Email editing and formatting controls

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

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Control	Name of the Control	Function
	Highlight	Highlights selected text with a color chosen from the color palette

Supervisor approval of email messages

Before an email message reaches a customer, supervisors can approve or reject the email messages that agents send to customers. The approver of the email messages is the supervisor assigned to the approval skillset of the contacts that the agent handles.

The approval process applies to email contacts only and does not apply to other contact types such as Fax, Scanned Documents, and SMS.

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

Agent Desktop follows the following process for approval of email messages from supervisors:

- When an agent sends an email message, the system marks the email message for approval and returns the email message to a predetermined skillset in the queue for approval. Supervisors who review the email message that the agent sends to the customer must be assigned to the approval skillset. This process is exactly the same as the current process of an agent sending an email message. The agent has no indication that the contact the agent is handling is a part of an approval process.

  Agents cannot request approval of email messages. Administrators cannot configure keywords to trigger the approval process.

  For more information, see Creating an email message on page 121 or Replying to an email message on page 120.
- If the supervisor approves the email message, the system marks the email message to be sent to the customer or returns the email message to the queue if the email message requires further approval. If the email message requires further approval, the system targets the email message to the next approval skillset in the hierarchy. For more information, see Approving email messages on page 131.
- If the supervisor rejects the email message, the system marks the email message as rejected and returns the email message to the queue targeted to the previous skillset. The supervisor can add review comments so that the originator can redraft the email message: the administrator can configure whether to make comments for email approval mandatory or not. The email message flows through the rejection hierarchy until the email message reaches the originator for redrafting.

  Only the originator of the email message can edit or redraft the email message. Supervisors at all levels can only add review comments.

For more information, see Rejecting an email message sent for approval on page 132 and Redrafting a rejected email message on page 133.

The system does not move email messages through the approval hierarchy in the following situations:

- Administrators delete a skillset that is part of the supervisor approval chain and the contact is already in queue waiting for that skillset to come into service
- Administrators delete the original agent and a supervisor rejects the email message
- Administrators delete the supervisor who must approve the email message

In order to handle such contacts, agents must use Agent Desktop to pull contacts.

Accepting an incoming email message

About this task

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

Procedure

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

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

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

Declining an incoming email message

About this task

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

Procedure

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

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

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Verifying customer information

About this task

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

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

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

Procedure

1. On the Agent Desktop, in the Customer Details window, click the **Details** tab to verify customer contact information.
2. Click the **History** tab to view the details of previous interactions with the customer for all the Multimedia types.
3. Click the **CI Details** tab to view the Customer Interface Web site details.

Resetting customer password

About this task

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

Procedure

1. On the Agent Desktop Action bar, click **Customer Search**.
2. Type a name in the **Search** field in the last name, first name format.

   The search field is not case-sensitive.
3. Click **Search**.

   The list scrolls to the appropriate name or the closest match.
4. Select the customer whose password you want to change.
5. Click the **CI Details** tab and select **Reset Password**.

Replying to an email message

Before you begin

- Ensure that you understand how to use the address book to reply to a contact. See Using the address book to reply to a contact on page 122.
- Ensure that you understand how to create a template response. See Using a template response on page 124.
- Ensure that you understand how to add attachments to an email message. See Adding an attachment to your email response on page 125.
- Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 127.

About this task

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

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

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

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

Procedure

1. On the Agent Desktop, in the Email window, click **Reply**.
2. In the E-mail Response window, accept the default **To** email address. The default email address is the address from which the message was sent.

   Or

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

   Or

   Click **Cc** to add other email addresses from the corporate address book or multimedia database.
3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
4. Add text to the reply using one or both of the following methods:
   - Type the message text.

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- Add a template response.

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

   You cannot format a plain text email message.

6. 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.
7. To perform a spell check, click the **SpellCheck** icon.
8. To insert an automatic signature to the email message, click the **Insert Signature** icon.
9. To add an attachment to the email response, click **Insert a file**.
10. In the **Agent Note** box, type additional information about the contact or the customer, if required.

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

11. Click **Send**.
12. Close the contact.

    If required, select a reason for closing the contact.

Creating an email message

Before you begin

- Ensure that you are assigned to an email skillset.

About this task

Create an email message to send to a customer.

Procedure

1. On the Agent Desktop Action bar, select **Initiate Email**.
2. In the **To** box, enter the email address of the customer.

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

3. Click **Create Email**.
4. In the **Subject** box, type the subject of the message.
5. In the body text box, add the email response. You can add the response using one or both of the following methods:

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

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

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7. Select the appropriate skillset from the **Skillset** list.
8. In the **Agent Note** box, type additional information about the contact or the customer, if required.

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

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

Using the address book to reply to a contact

About this task

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

Procedure

1. In the email window, click **To** or **Cc**.
2. In the Select Names dialog box, from the **Search for records from** box, select the database to search for customer address. Select either **Customers** or **LDAP**.
3. If you select **Customers**:
   a. Define your search criteria and type a name in the **Search** field. The **Search** field is not case-sensitive.
   b. Click **Search**.
   c. Select a name from the results list and click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.

      Note:

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

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

   Note:

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

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

Removing a name from the recipient list

About this task

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

Note:

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

Procedure

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

Creating a template response

About this task

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

Note:

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

Procedure

1. Create the response message in a text editor, such as Notepad.
2. Click **Save As**.
3. Name the file using a descriptive name and ensure that the file name has a .txt or an .html extension. For example, `WarrantyURL.txt`.
4. Navigate to the appropriate folder to store the template response file.
5. Save the file.

Defining your default template folder

About this task

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

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Preferences** tab.
3. In the **Default Template Location** box, type the complete path to the template folder.

   Or

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

Using a template response

About this task

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

Procedure

1. In the email window, click **Insert a Template**.
2. Navigate to the template folder.

   If you have defined a template folder in the user settings, the default template folder automatically appears.
3. Select the template file, and then click **Open** to display the template text.
4. Edit the text in the body of the email message, if necessary.

Defining your default attachment folder

About this task

Define a default attachment folder in which to store files to add as attachments to email messages. You can add a file from the Shared Files folder that your administrator creates, or you can attach files by navigating to any other directory, folder, or subfolder on your computer.

Note:

You must save file attachments with UTF-8 encoding.

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Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Preferences** tab.
3. In the **Default Attachment Location** box, type the complete path to the folder containing the attachment.

   Or

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

Adding an attachment to your email response

About this task

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

Procedure

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

   If you have defined an attachment folder in the user settings, the default attachment folder automatically appears.
3. To add a file from a different location, navigate to the appropriate directory or folder.
4. Locate and select the file to attach.
5. Click **Open**.

Viewing email attachments

About this task

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

Note:

Some browsers do not support some attachment formats.

Procedure

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

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Removing an attachment from an email response

About this task

You can remove one or more attachments from an email response to a contact.

Procedure

1. In the email window, click **Remove**.
2. In the **Select Attachment(s) to remove** list, select the attachment you want to delete.

   Use `Ctrl+click` to select multiple attachments.
3. Click **OK**.

Adding inline images

About this task

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

Inline attachments display complete information within the body of the email. This makes the information easily accessible to customers, even without explicitly opening the attachment. For example, you can add a company logo as an inline image to increase brand awareness.

Note:

The inline image formats supported are .gif, .bmp, .jpg, and .png.

Procedure

1. On the email toolbar, click the **Image** icon.
2. In the body text box, position your cursor where you want to add your image.
3. Click **Browse** to locate and select the image.

   Or

   Type the path for the image in the **Image Address (URL)** box.
4. Optionally, enter the **Alternate text** for the image.
5. Select the appropriate alignment option, for the image, from the **Align** drop-down list.
6. Optionally, enter the **Border** value to create a border around the image.
7. Optionally, enter the **Margin** value to insert a margin around the image.
8. Click **Insert Image**.

   The image is inserted at the cursor position.

Variable definitions

Name	Description
Browse	Browse to locate the inline image that you want to include in the email message.
Image Address (URL)	The URL for the inline image that you want to include in the email message.
Alternate text	The alternative text for the image. Alternate text is what the customer sees if their email client cannot display the image.
Align	Alignment of the image. The options are inline, left and right.
Border	Border around the image. For example, enter 2, to add a double-sized border around the image.
Margin	Margin around the image.

Using the spelling checker

About this task

Use the spelling checker on the Agent Desktop interface to locate spelling errors in your email message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select the default language for the spell checking dictionary. You can also specify a spell check dictionary for a particular email message by selecting a language from the list on the right side of the email toolbar.

The spell check feature highlights words in the email subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

Note:

The spell check feature does not check spelling in attachments.

Procedure

1. Once you complete typing your email message, click the **SpellCheck** icon.
2. If the spell check feature highlights a word, perform one of the following steps:
   - Click **Ignore** to keep the original spelling of the word.
   - Click **Ignore All** to keep the original spelling of all instances of the word.
   - Click **Add** to add the selected word to the dictionary.
   - Click **Replace** to replace the word with the suggested text.

- Click **Replace All** to replace all instances of the word with the suggested text.
- Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits, words in uppercase, and words with HTML tags.
- Click **Cancel** to terminate the spell check.

Closing the email contact

About this task

Close the email contact when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Close** to complete the contact.
2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your email contact.

Postponing work on a contact

About this task

You can postpone work on a contact after you have started to compose a reply. For example, postpone a contact if you need to wait for further information before replying to the contact. When you postpone the contact, you reschedule it for Contact Center re-present it at a future time and date.

If you postpone an email for less than 10 minutes, in certain scenarios the email does not reopen precisely at the scheduled time. The email reopens a few minutes after the scheduled time.

Important:

If you have started composing a reply and you postpone the contact, Contact Center does not save the content of the reply. Before clicking **Reschedule**, copy and save text from the reply if you want it for when presents it to you again.

Procedure

1. On an open email contact, click **Finish**.

   Agent Desktop displays the Disposition screen.
2. Click **Reschedule**.
3. In the Present Contact at dialog box, enter the time and date to reopen the contact.

   Contact Center resets the contact to present to you at the time you specify.

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4. In the **Agent Note** field, add a note to remind yourself why you rescheduled the contact.
5. Click **Save**.

   You still own the contact and can continue to work on the contact when Contact Center presents it to you again. You can view the pending contact in the **History** tab.

Following up on a contact

About this task

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

Procedure

1. Click **Follow-up**.

   The email display control appears.
2. Perform the necessary follow-up action.

Transferring a contact within the Contact Center

About this task

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

When you transfer a contact to a skillset or an agent, you also transfer ownership of the contact. The system automatically forwards the entire contact, including any attachments, to the new agent. You can also add additional information for the contact.

Procedure

1. Click **Transfer**.
2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the contact to a specific agent.
3. Select the skillset or agent to which you want to transfer the contact.
4. In the **Agent Note** box, type additional information about the reason for the transfer.
5. Click **Transfer**.

Transferring a contact outside the Contact Center

About this task

Transfer a contact to an email address outside the Contact Center for consultation.

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

Procedure

1. Click **Transfer**.
2. Click the **External** tab.
3. Enter the email address to which you want to transfer the contact.

   Or

   Click **To** to select an address from the corporate address book.
4. In the **Agent Note** box, type additional information about the reason for the transfer.
5. To add an attachment, click **Attach**.
6. Click **Transfer**.

Printing contact details

About this task

Print a summary of the interaction with a contact. All information that is displayed in the bottom-left of the email or Outbound contact window gets printed. Print Preview is also supported.

Procedure

Click **Print Contact**.

Sending an email message to an agent using Phonebook

About this task

You can use Phonebook to send an email message to an agent through the LDAP agent contact directory.

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

- Favorites
- Speed Dials
- Custom Contacts

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Once you filter contacts, it becomes easier to search for the contact and send an email message to that contact. For more information, see Filtering contacts using Phonebook on page 64.

Procedure

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

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

2. Search for a contact.

   For more information about searching for a contact, see Searching for a contact in Phonebook on page 63.

3. Select a name, and click the **Click to email** icon under the Email column.

   The systems displays the email window with the default address of the agent in the **To** address field.

4. In the **Subject** box, type the subject of the email message.
5. In the **Body** text box, type the message text.
6. To add a file to the email message, click **Insert a file**.
7. Click **Send**.

Approving email messages

Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.

  Note:

  Agents can belong to the skillset that approves email messages. Therefore, administrators must configure the approval process in a way that restricts agents from approving email messages.

- Ensure that the administrators have configured the approval hierarchy for email messages. For more information, see *Avaya Aura® Contact Center Server Administration* (44400-610).

About this task

A supervisor receives an email message for approval when an agent replies to a contact or sends an email message. The email message is marked for approval and returned to the queue to a pre-determined skillset for approval. The agent has no indication that the contact the agent is handling is part of an approval process.

Note:

Agents cannot request approval of email messages. Administrators cannot configure keywords to trigger the approval process.

Agent Desktop presents the supervisor with the option to approve or reject the email message. Supervisors can view existing review comments and enter additional review comments.

Procedure

1. Accept the incoming email message. See Accepting an incoming email message on page 118.
2. Review the email message under the Proposed Email section.
3. In the Customer Details window, click the **Review** tab to view previously entered review comments.

   In the **Review** tab, you can also view the ID and the name of the previous supervisors, the time of approval, and the hierarchy level.
4. In the **Review Comments** field, add your comments for the email message.
5. Click **Approve**.

   The email is either marked for sending to the customer, or returned to the queue marked for approval and targeted to the next approval skillset in the hierarchy, depending on the approval hierarchy set up by the administrator.

   The system displays the Approval Confirmation dialog box.
6. Click **Yes**.

Rejecting an email message sent for approval

Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.

  Note:

  Agents can belong to the skillset that approves email messages. Therefore, administrators must configure the approval process in a way that restricts agents from approving email messages.
- Ensure that the administrators have configured the rejection hierarchy for email messages. For more information, see *Avaya Aura® Contact Center Server Administration* (44400-610).

About this task

A supervisor can reject an email message that is sent for approval.

Procedure

1. Accept the incoming email message. See Accepting an incoming email message on page 118.
2. Review the email message under the Proposed Email section.

3. In the Customer Details window, click the **Review** tab to view previously entered review comments.

   In the **Review** tab, you can also view the ID and the name of the previous supervisors, the time of approval or rejection, and the hierarchy level.

4. In the **Review Comments** field, add your comments for the email message.
5. Click **Reject**.

   The email is marked as rejected and returned either to the originator or to the queue targeted to the previous skillset depending on the rejection hierarchy set up by the administrator. The email message is sent through the rejection hierarchy to the originator for a redraft of the email message. If a rejection hierarchy is set up by your administrator, supervisors at each level must approve the rejection.

   The system displays the Rejection Confirmation dialog box.

6. Click **Yes**.

Redrafting a rejected email message

About this task

The agent (originator of the email message) receives the rejected email message. The agent must redraft the email message and resubmit the email for approval. Agents can redraft the email message based on the comments added by the supervisors. The agent can also add additional comments for supervisors. After the agent redrafts the email message, the email must go through the complete approval hierarchy.

Note:

Only the originator of the email message can edit or redraft the email message. Supervisors at all levels can add review comments to the email message only.

Procedure

1. Accept the incoming email message. See Accepting an incoming email message on page 118.
2. In the Customer Details window, click the **Review** tab to review the comments added by the supervisors.

   In the **Review** tab, you can also view the ID and the name of the supervisor, the time of rejection, and the hierarchy level.

3. Under Proposed Email, click **Redraft** to rewrite the email message based on the comments added by the supervisors.
4. **(Optional)** In the **Agent Note** field, type additional information about the contact or the customer.

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

5. In the **Review Comments** field, add your comments for the supervisors.
6. Click **Send**.
7. Click **Close**.

   The email is returned to the queue marked for approval and targeted to the next approval skillset in the hierarchy, depending on the approval hierarchy set up by the administrator.

Chapter 11: Fax message

This chapter describes how to perform fax message tasks. Use Agent Desktop to perform the following tasks when you handle a fax message:

- Accept or decline the incoming fax message
- Review the fax message
- Send a reply
- Close a fax message
- Transfer a fax message

Fax messages from customers are forwarded by a fax server to an email address within the Contact Center. The fax is sent to an appropriate skillset queue. If you are assigned to this skillset, then the fax message is presented to you. You reply to the fax message by sending an email message back to the fax server. The fax server then sends the reply fax to the customer.

Prerequisites

Procedure

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling fax messages.

Accepting an incoming fax message

About this task

Accept an incoming fax message to view the message. The Agent Desktop presents this new fax message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new fax message work item, and click **Accept**.

The fax message opens in the fax display panel.

Declining an incoming fax message

About this task

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

Procedure

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

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

Reviewing a fax message

Before you begin

- Ensure that you have accepted a fax message and opened it in the fax viewer.

About this task

Use the Agent Desktop fax viewer to review a fax message.

Procedure

1. On the Agent Desktop fax viewer, click **Navigate** to view all the pages of the fax message.
2. Click **Rotation** to rotate the fax message.
3. Click **Zoom** to magnify the fax message.

Replying to a fax message

Before you begin

- Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 127.

About this task

Reply to a fax message when a customer sends a fax message to the Contact Center requesting a response. You reply to a fax message by sending an email message to a fax server. The fax server then sends the reply fax back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.
2. In the Fax Response window, accept the default email address that appears in the **To** box.

   The default email address is the same email address from which the message was sent.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
4. Type the reply in the email editor text box.
5. If you use the HTML format for creating the email message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.

   You cannot format email messages that are created in plain text.
6. To perform a spell check, click the **SpellCheck** icon.
7. To insert an automatic signature to the fax message, click the **Insert Signature** icon.
8. In the **Agent Note** box, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.
9. Click **Send**.
10. Close the contact.

    If required, select a reason for closing the contact.

Closing a fax message

About this task

Close a fax message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the fax message.
2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your fax message.

Transferring a fax message

About this task

Transfer a fax message to another skillset or to a specific agent in the Contact Center. When you transfer a fax message to a skillset or agent, you also transfer the ownership of the contact.

Procedure

1. Click **Transfer**.
2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

Click the **User** tab to assign the fax message to a specific agent.

3. Select the skillset or agent to which you want to transfer the contact.
4. In the **Agent Note** box, type additional information about the reason for the transfer.
5. Click **Transfer**.

Chapter 12: Scanned document

This chapter describes how to perform tasks to handle scanned documents. Use Agent Desktop to perform the following tasks when you handle a scanned document message:

- Accept or decline an incoming scanned document
- Review the scanned document
- Reply to a scanned document
- Close the scanned document
- Transfer a scanned document

A scanned document is an electronic version of a printed page or document. Scanned documents are forwarded in the TIFF format, in a Contact Center, by a document imaging server to an email address. You can reply to the scanned document by sending an email message to a printer. The printed email message is then sent back to the customer.

Prerequisites

Procedure

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling scanned documents.

Accepting an incoming scanned document message

About this task

Accept an incoming scanned document message to view the message. The Agent Desktop presents this new scanned document as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new scanned document work item, and click **Accept**.

The scanned document opens in the document display panel.

Declining an incoming scanned document message

About this task

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

Procedure

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

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

Reviewing a scanned document message

Before you begin

- Ensure that you have accepted a scanned document and opened it in the document viewer.

About this task

Use the Agent Desktop document viewer to review a scanned document message.

Procedure

1. On the Agent Desktop document viewer, click **Navigate** to view all the pages of the document.
2. Click **Rotation** to rotate the scanned document.
3. Click **Zoom** to magnify the scanned document.

Replying to a scanned document message

Before you begin

- Ensure that you understand how to use the spell check feature. See Using the spelling checker on page 127.

About this task

Reply to an scanned document message when a customer sends a scanned document to the Contact Center requesting a response. You can reply to the scanned document by sending an email message to a printer. The printed email message is then sent back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.
2. In the Response window, accept the default email address that appears in the **To** box.

The default email address is the same email address from which the message was sent.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
4. Type the reply in the email editor text box.
5. If you use the HTML format for creating the email message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.

   You cannot format email messages that are created in plain text.
6. To perform a spell check, click the **SpellCheck** icon.
7. To insert an automatic signature to the message, click the **Insert Signature** icon.
8. In the **Agent Note** box, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.
9. Click **Send**.
10. Close the contact.

    If required, select a reason for closing the contact.

Closing a scanned document message

About this task

Close the scanned document message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the scanned document message.
2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your scanned document message.

Transferring a scanned document

About this task

Transfer a scanned document to another skillset or to a specific agent within the Contact Center. When you transfer a scanned document to a skillset or agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.

2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the scanned document to a specific agent.
3. Select the skillset or agent to which you want to transfer the contact.
4. In the **Agent Note** box, type additional information about the reason for the transfer.
5. Click **Transfer**.

Chapter 13: Voice mail messages

This chapter describes how to perform tasks to handle voice mail messages. Use Agent Desktop to perform the following tasks when you handle a voice mail message:

- Accept or decline the incoming voice mail message
- Listen to a voice mail message
- Reply to a voice mail message
- Close a voice mail message
- Transfer a voice mail message

In the Contact Center voice mail messages are forwarded by a voice mail server to an email address as a .wav attachment. The voice mail message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles voice mail message, then the voice mail message is presented to you.

Prerequisites

Procedure

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling voice mail messages.

Accepting an incoming voice mail message

About this task

Accept an incoming voice mail message to view the message. The Agent Desktop presents this new voice mail message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new voice mail message work item, and click **Accept**.

The voice mail message opens in the email display panel. The voice mail is a .wav attachment present in this email.

Declining an incoming voice mail message

About this task

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

Procedure

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

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

Listening to a voice mail message

Before you begin

- Ensure that you have accepted a voice mail message and opened it in the email viewer.
- Ensure you have a media player that supports .wav file format audio files.

About this task

Use the default Windows Media player to listen to a voice mail message.

Procedure

1. On the Agent Desktop email viewer, under **Attachments**, double-click the .wav attachment to open it in your default media player.
2. Listen to the voice mail message.

Replying to a voice mail message

Before you begin

- Ensure that you obtain the customer's contact details from the voice mail or from the Customer Details panel.

About this task

Reply to an voice mail message when a customer sends a voice mail message to the Contact Center requesting a response. You reply to a voice mail message by calling back the customer.

Procedure

1. On the Agent Desktop Action bar menu, click **Initiate Call**.
2. In the text box to the left of **Initiate Call**, enter the phone number to dial.
3. Click **Initiate Call** again.

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

4. Click **Release** when you complete the call.
5. If required by your supervisor, type an activity code in the **Activity Code** box, and then press `Enter`.

Closing a voice mail message

About this task

Close the voice mail message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the voice message.
2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your voice mail message.

Transferring a voice mail message

About this task

Transfer a voice mail message to another skillset or to a specific agent within the Contact Center. When you transfer a voice mail message to a skillset or an agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.
2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the voice mail message to a specific agent.
3. Select the skillset or agent to which you want to transfer the contact.
4. In the **Agent Note** box, type additional information about the reason for the transfer.
5. Click **Transfer**.

Chapter 14: Short Message Service text message

This chapter describes how to perform tasks to handle Short Message Service (SMS) text message tasks. Use Agent Desktop to perform the following tasks when you handle an SMS text message:

- Accept or decline the incoming SMS text message
- Send a reply
- Check the spelling of an SMS text message
- Close an SMS text message contact
- Transfer an SMS text message

SMS text messages from customers are forwarded by an SMS gateway to an email address within the Contact Center. The SMS text message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles SMS text messages, then the SMS text message is presented to you.

Prerequisites

Procedure

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling SMS text messages.

Accepting an incoming SMS text message

About this task

Accept an incoming SMS text message to display customer details and begin contact with a customer. The Agent Desktop displays the customer details and the call timer appears on the work item. The new incoming SMS text message is presented as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new SMS text message work item, and click **Accept**.

The SMS text message opens in the display panel.

The customer details for the SMS text message appears in the bottom-left hand corner of the Customer Details panel.

Declining an incoming SMS text message

About this task

Decline an incoming SMS text message if you cannot handle the message.

Procedure

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

The SMS text message work item is removed from the work list. The contact returns to the queue and your status is set to Not Ready.

Replying to an SMS text message

About this task

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

You can use several features on the Agent Desktop interface to help you to create your response:

- one or more response templates
- the spelling checker

You can add a comment to the message in the **Agent Note** box to provides reference for later communications with the customer. The customer does not see the content of the **Agent Note** box.

Procedure

1. After you review the customer contact, click **Reply**.
2. In the E-mail Response window, accept the default To email address, with the same email address from which the message was sent.

   Or

   Click **To**, **Cc** to add other email addresses from the corporate address book or multimedia database.
3. In the **Subject** box, accept the subject currently displayed or edit the subject.
4. Add text to the reply using one or both of the following methods:
   - Type the message text.

- Add a template response.

5. To perform a spell check, click the **SpellCheck** icon.
6. In the **Agent Note** box, type additional information about the contact or the customer.

   Only agents and supervisors can view the information in the **Agent Note** box.
7. Click **Send**.
8. Close the contact.

   If required, select a reason for closing the contact.

Using the spelling checker

About this task

Use the spell check feature on the Agent Desktop interface to locate spelling errors in your message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select a default language for the spell check dictionary. You can also specify a spell check dictionary for a particular email message by selecting a language from the list on the right side of the toolbar.

The spell check feature highlights words in the SMS text message subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

Procedure

1. Once you complete typing your SMS text message, click the **SpellCheck** icon.
2. If the spell check feature highlights a word, perform one of the following steps:
   - Click **Ignore** to keep the original spelling of the word.
   - Click **Ignore All** to keep the original spelling of all instances of the word.
   - Click **Add** to add the selected word to the dictionary.
   - Click **Replace** to replace the word with the suggested text.
   - Click **Replace All** to replace all instances of the word with the suggested text.
   - Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
   - Click **Cancel** to terminate the spell check.

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Closing an SMS text message contact

About this task

Close the SMS text message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the contact.
2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your SMS text message.

Transferring an SMS text message

About this task

Transfer an SMS text message to another skillset or to a specific agent within the Contact Center.

When you transfer an SMS text message to a skillset or an agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.
2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.

   Or

   Click the **User** tab to assign the contact to a specific agent.
3. Select the skillset or agent to which you want to transfer the SMS text message.
4. Select the **External** tab if you want to transfer the SMS text message outside the Contact Center for consultation.
5. In the **Agent Note** box, type additional information about the reason for the transfer.
6. Click **Transfer**.

Chapter 15: Social Networking

Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle a Social Networking (SN) contact:

- accept or decline the incoming SN contact
- hold and unhold an SN contact that you accepted
- transfer an SN contact to another agent or an outside expert
- connect to the Social Media Manager (SMM) agent interface to reply to the social media message for the SN contact

In Agent Desktop, a Social Networking contact appears similar to an email contact, but has an Avaya Social Media Manager header. There is no toolbar, because your agent actions on an SN contact happen in a link to the SMM agent interface.

After accepting an SN contact, you can preview basic details such as the time of the original post, the mailbox to which SMM sent the contact, and the SMM user analysis. Agent Desktop displays a link to the SMM contact. When you click the link, Agent Desktop displays a pop up to allow you to log on directly to the SMM agent interface and work on the contact. Your Contact Center agent logon is not synchronized with the SMM logon, so you must have an SMM logon to process SN contacts.

You can only accept, hold, unhold, transfer, and release an SN contact. You cannot perform a conference on an SN contact, nor can a supervisor agent observe or barge in on an SN contact.

When you finish processing a Social Networking contact, you must first close the contact in SMM, and then separately close the SN contact in Agent Desktop. You do not enter a Closed Reason code when you close an SN contact.

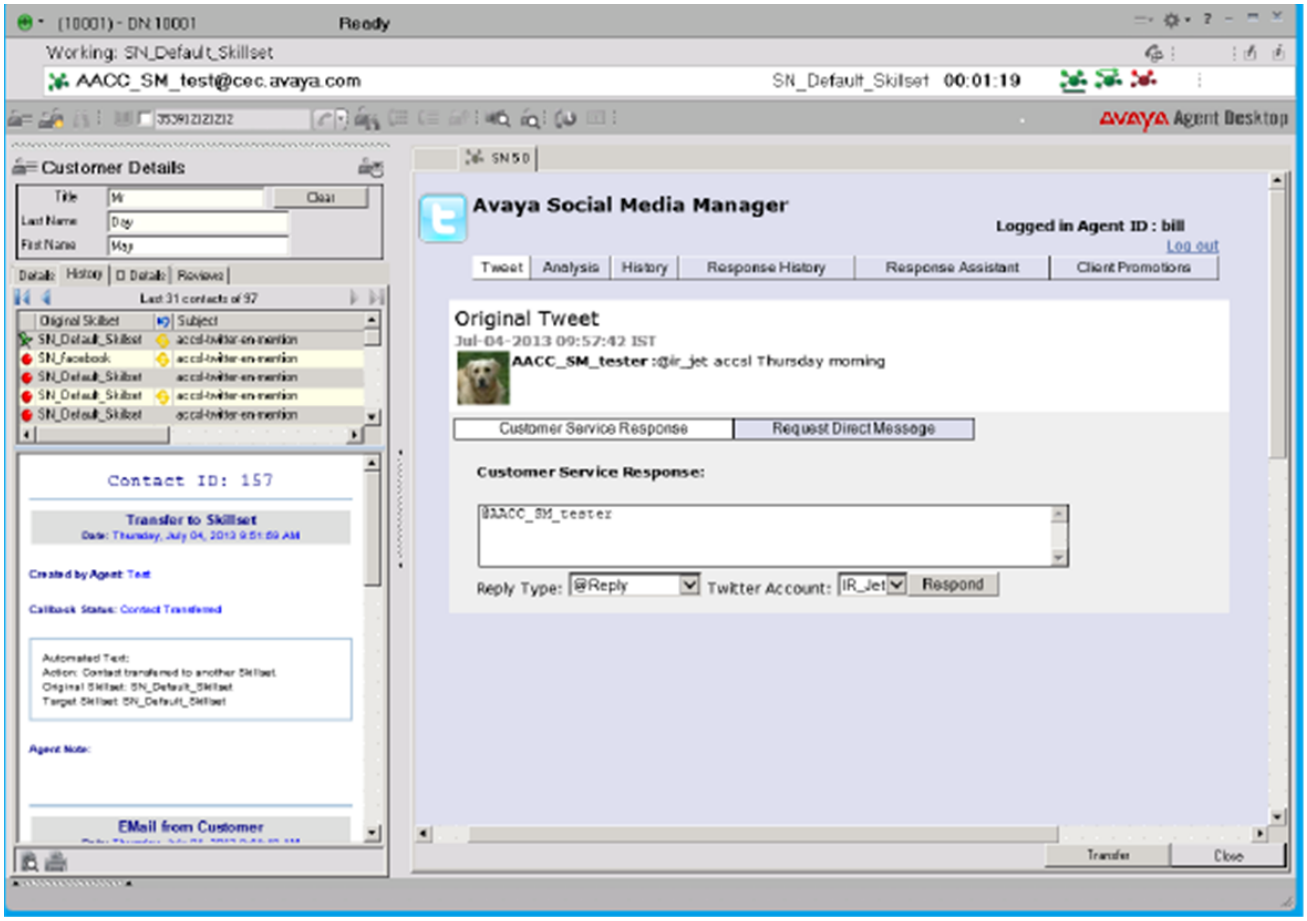


Figure 7: Example of a Social Networking contact with integration of the SMM client

Accepting a new social networking contact

About this task

Accept an incoming Social Networking contact to respond to a social media message that Social Media Manager forwarded to Avaya Aura® Contact Center (AACC). Agent Desktop displays the contact details and the call timer appears on the work item. The new incoming Social Networking contact appears as a new work item in the Work List window.

Procedure

On a presenting Social Networking work item in the work list window, click **Accept**.

The Social Networking contact opens in the **Display** panel. The information associated with the SN contact appears in the **Customer Details** panel.

Declining an incoming Social Networking contact

About this task

Decline an incoming Social Networking contact if you cannot handle the contact at this time. The new incoming SN contact disappears from your work list.

Procedure

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

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

Placing a Social Networking contact on hold

About this task

Place a Social Networking contact on hold if you do not want to work on it immediately.

Procedure

1. Select the Social Networking work item.
2. Click **Hold**.

Releasing a Social Networking contact on hold

About this task

Release a Social Networking contact that you placed on hold when you want to resume working on it.

Procedure

1. Select the Social Networking work item.
2. Click **Unhold**.

   The contact becomes active and the status bar color changes to green.

Responding to a Social Networking contact

Before you begin

- Ensure you are familiar with the Social Media Manager agent interface for responding to social networking contacts.

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- Ensure you have an agent ID for your Social Media Manager server.
- Accept a Social Networking contact in Agent Desktop.

About this task

Log in to the SMM agent interface from an open Social Networking contact, to respond to the social media contact selected by Social Media Manager.

Procedure

1. Select the Social Networking work item.
2. In the **Enter AgentID** field, enter your SMM agent ID.
3. Click **Submit**.

   The SMM agent interface opens in the SN contact tab.
4. Use the functions of the SMM agent interface to respond to the SN contact.

Example

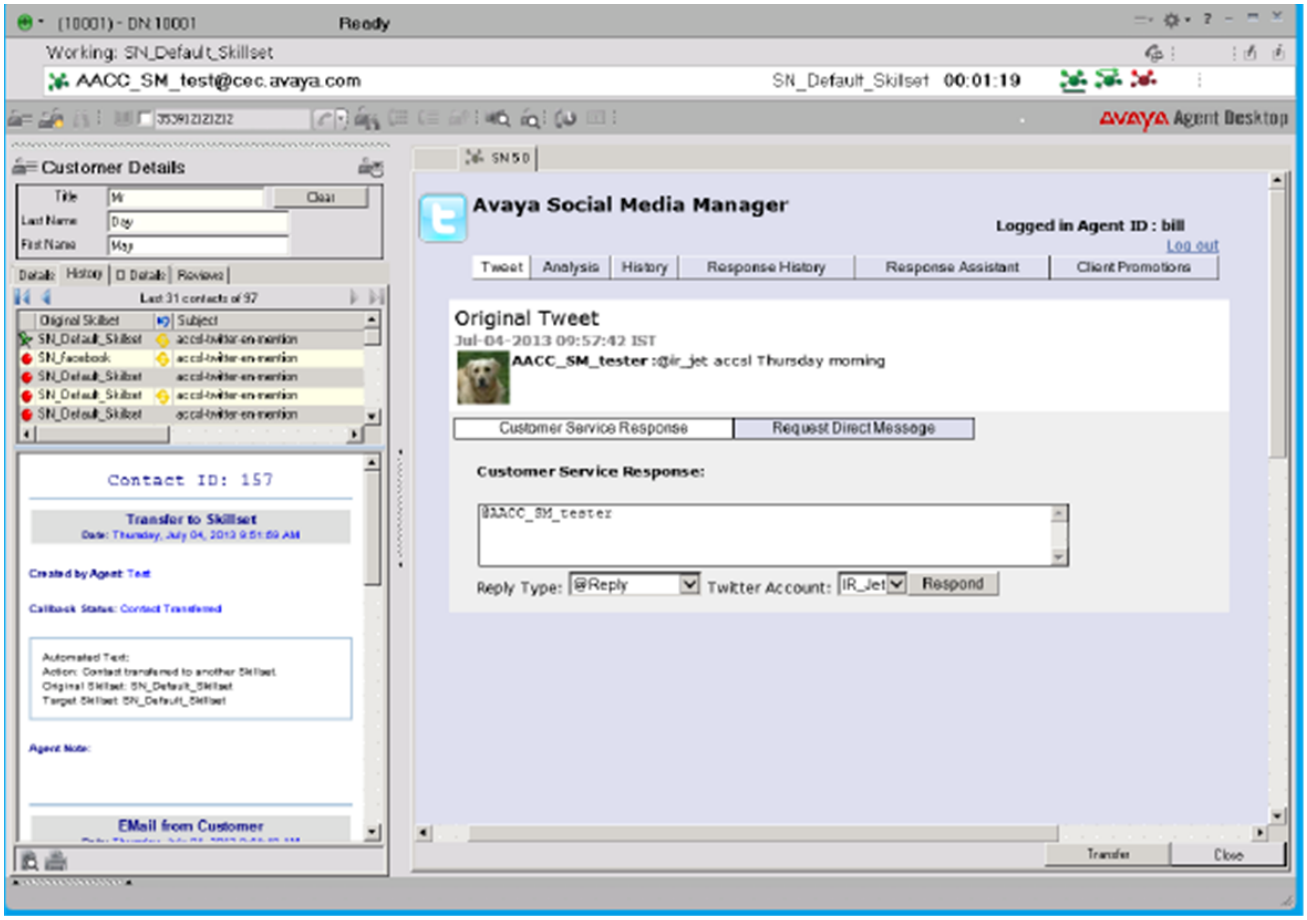


Figure 8: Example of an open Social Networking contact with the SMM agent interface for responding to the customer

Transferring a Social Networking contact

About this task

Transfer a contact to another skillset, to a specific agent within the Contact Center, or to an external email address.

Procedure

1. Select the Social Networking work item.
2. Click **Transfer**.

   Agent Desktop displays the **Transfer To** screen.
3. To transfer the contact to an agent:
   a. Click the **User** tab.
   b. Select the agent to whom you want to transfer the contact.
   c. In the **Agent Note** field, type a note on the reason for transferring the contact.
   d. Click **Transfer**.
4. To transfer the contact to a skillset:
   a. Click the **Skillset** tab.
   b. Select the skillset to which you want to transfer the contact.
   c. In the **Agent Note** field, type a note on the reason for transferring the contact.
   d. Click **Transfer**.
5. To transfer the contact to an external email address:
   a. Click the **External** tab.
   b. Complete the details for the external email.
   c. Click **Transfer**.

Closing a Social Networking contact

Before you begin

- Accept and respond to an SN contact.

About this task

Close a Social Networking contact after you have responded to it in the Social Media Manager interface. You do not enter a Closed Reason code when you close an SN contact.

Procedure

1. In the SN contact tab, complete your response to the customer using the SMM agent interface.

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2. Click **Close**.

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Chapter 16: Web communications

This chapter describes how to perform the tasks to handle Web communications contacts. It describes how to use the following Web communications features to communicate directly with customers in real time over the Internet using Agent Desktop:

- Accept or decline an incoming contact
- Customize a tab name
- Review and update customer information
- Send an automated response
- Push a Web page
- Transfer a chat session
- Conference a chat session
- Observe a Web Communications contact (supervisor/agent only)
- Barge-in on a Web Communications contact (supervisor/agent only)
- Check whether the customer's browser is still connected
- Check the time of the most recent customer action and whether the customer is currently typing a message
- Respond to the customer (email or voice) if more information or clarification is needed
- End a chat session
- Send the chat log in an email message

Accepting a Web communications contact

Before you begin

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

About this task

Accept a Web communications contact to communicate privately with a customer in real time over the Internet. An agent and a customer can use the text chat component of the Agent Desktop to conduct a two-way conversation by exchanging messages.

A customer requests a chat session by clicking the **Text Chat** icon on the Web site. The customer is presented with a form to fill in and select the appropriate skillset, subject, and objective for their chat session. The customer is then placed into Web-on-hold, or a similar treatment configured in your Contact Center, while waiting for an agent to accept their chat request.

The text chat frame displays a complete record of the conversation as well as any URLs that you previewed or pushed to the customer. Each chat message can contain up to 4045 characters.

The Agent Desktop can be configured to give audio and visual alerts when a contact is presented. These features are configured by an administrator, using the Contact Center Multimedia Administration tool.

After you accept the contact, you can view the customer details and a history of all past interactions with the Contact Center in the left pane, such as the most recent message sent by the customer, whether the customer's browser is still connected to the session, and whether the customer is currently typing a message. The right pane of the Agent Desktop shows the tools used for Web communications:

- Send the Message — Add the comments from the **Chat** box to the Conversation frame.
- Push the URL — Send a selected URL to the customer's browser.
- Add the selected auto-phrase — Add the selected auto-phrase to the Conversation frame.
- Select the text alignment — Change the alignment of text from left to right to right to left and vice versa.
- E-mail chat log — Select this check box to email a copy of the chat log to the customer.

Procedure

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

Note:

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

Customizing a tab name

About this task

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

Procedure

1. On the Agent Desktop right panel, double-click the required tab.
2. Type the <*contact name*>.

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Variable definitions

Name	Description
<*contact name*>	The keyword you use to identify the customer. For example, the first name or the last name.

Declining a Web communications contact

About this task

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

Procedure

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

The contact returns to the queue and into Web-on-hold. Your status is set to Not Ready.

Note:

If two or more Web communications contacts are simultaneously presenting to the agent on Agent Desktop and one Web communications contact is rejected, all contacts are rejected.

Sending a chat message

About this task

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

Procedure

1. Type the message.
2. Click the **Send the Message** icon.

   Your name or agent label appears in the Conversation frame, followed by your message.

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Adding an auto-phrase to a chat message

About this task

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

Procedure

1. Select the **Add the selected auto-phrase** icon.
2. Select the auto-phrase to use from the list.

   The automatic phrase is added to the **Chat** text box. When the chat message is completed and saved, the automatic phrase is added to the Conversation frame and the text chat log.

Pushing a Web page to a customer

About this task

Push a Web page to a customer's browser, if you decide that a Web page can assist with the contact. Use the Page Push feature to push a Web page. The customer can also push a Web page to your browser.

Page Push has the following limitations:

- Some Web pages do not appear the same when pushed to another person's browser. For example, in case of Web pages that can be personalized to display weather or news, each person sees their own version of the page.
- Dynamic pages that are customized through the use of cookies can appear differently since you and the customer both have separate cookies. Cookies are never shared by you or the customer.
- Framed pages cannot be pushed completely. The URL defining the frameset is pushed, but the individual URLs in each frame are not pushed.
- After a page is pushed, if either you or the customer follows a link to another page, the other person does not see that change.
- If you and the customer both click the **Push the selected web page** icon at approximately the same time, you both see the form that was pushed last. However, both URLs appear in the text chat log.

Procedure

1. Select the **Push the selected web page** icon.
2. Type the URL you want to send.
3. Select the URL to send.

   OR

   Select a predefined URL to send.

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The page is pushed to the customer's browser and the URL is added to the Conversation frame and the text chat log.

Performing a Web Communications transfer to a skillset

About this task

You can transfer a Web Communications (WC) contact to a skillset, if your administrator allows.

The agent who answers the transferred contact views all the messages that were previously sent by the customer and the previous agent. The agent can also view the transfer details such as:

- the agent who transferred the contact
- the skillset from which the contact is transferred
- the skillset to which the contact is transferred
- the reason for transferring (if the agent who transferred the contact provides the reason)

Important:

You cannot transfer a contact to a skillset that does not have active agents.

Procedure

1. Click **Consult/Transfer**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Optionally, enter the reason for transfer under **Transfer Reason**.

   The agent that answers the transferred contact can view the transfer details, including the reason for the transfer.
4. Click **Transfer**.

   Agent Desktop refreshes the list of agents active on the selected skillset and queues the contact to the selected skillset.

Transferring a chat session

About this task

Transfer a chat session to another available agent. You can transfer a chat session only once.

Procedure

1. Click **Consult**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Click the appropriate agent name.

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4. Click **Consult**.

   The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the transfer.

   Note:

   The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Transfer**.

   The chat session is now transferred to the other agent and it is no longer displayed on your Agent Desktop. Your status is set to Ready.

Conferencing a chat session

About this task

Conference a chat session to another available agent. You can conference only one agent into a chat session.

Procedure

1. Click **Consult**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Click the appropriate agent name.
4. Click **Consult**.

   The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the conference.

   Note:

   The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Conference**.

   The Consult Text Chat window closes and the original Conversation window reappears. When the agent who was added to the conference begins typing, it is visible to all three participants.

   Note:

   On Agent Desktop, for the agent who initiated the conference, the **Consult** button is not visible for the entire duration of the Web communications contact. The agent cannot initiate another consult during this period.

6. When you want to leave the conference, click **Close**.

   A message appears in the Conversation window that indicates when a participant leaves the conference.

Observing a Web Communications contact

Before you begin

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

About this task

An supervisor/agent can observe an agent-customer Web Communications contact. When an supervisor/agent starts observing a Web Communications contact, the agent receives a notification that an supervisor/agent is observing the contact. The agent can continue the conversation without interference from the supervisor/agent. The customer does not receive a notification and is not aware that an supervisor/agent is observing the contact.

Note:

You must log on to the Agent Desktop to observe a Web Communications contact.

When you are observing a contact, only the agent already interacting with the contact can set an activity code for that contact.

Procedure

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

   The Agent Desktop displays the Supervisor Observe window.

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

   In the **Contacts** list, the red flag indicates the contacts whose intrinsic values are exceeding the threshold defined by your administrator in the CCMM Administration tool.

3. Click the contact to view the intrinsics for that contact.

   The intrinsics are assigned with priority 1 to 5. Contacts exceeding threshold limits for high priority intrinsics, appear higher in the **Contacts** list.

   Note:

   Administrators must configure intrinsic priorities in the CCMM Administration tool.

4. Select a Web Communications contact and click **Observe**.

   The Agent Desktop displays the Customer Text Chat window.

   Note:

   When using the Observe function, you cannot participate in the Web Communications contact. Use the barge-in function to participate in the Web Communications contact. See Barging-in on a Web Communications contact on page 163.

5. Click **Close** when you finish observing the Web Communications contact.

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Barging-in on a Web Communications contact

Before you begin

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

About this task

An supervisor/agent can participate in an agent-customer Web Communications contact.

Note:

You must log on to the Agent Desktop to barge-in on a Web Communications contact. You can barge-in on a Web Communications contact only after you have observed that Web Communications contact.

When you barge-in on a contact, only the agent already interacting with the contact can set an activity code for that contact.

Procedure

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

   Note:

   The **Barge-in** button for an agent is enabled only after you observe the agent's Web Communications contact. To observe a Web Communications contact, see Observing a Web Communications contact on page 162.

   The Agent Desktop displays the Customer Text Chat window.

2. In the **Text** box, type your message to the customer.
3. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

4. Click **Close** when your conversation is complete.

   The agent-customer Web Communications contact continues until all the agents or the supervisor/agents have left the Web Communications contact or the customer leaves the Web Communications contact.

Ending the Text Chat session

About this task

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

Procedure

1. Click **Finish**.
2. In the **Notes** box, type additional information about the contact.
3. If Closed Reasons are required, select one of the configured **Closed Reason** codes that best describes the reason you closed your text chat session.
4. Click **Close**.
5. Repeat step 1 to step 4 to close each additional Web communications contact.

Sending the chat log in an email message

About this task

If your Contact Center is licensed for email, you can send a copy of the completed text chat log by email to the customer.

Procedure

Below the Conversation window, select the **Envelop** icon or the check box next to it, to email the chat log to the customer.

Chapter 17: Instant Messaging

Use the Avaya Aura® Agent Desktop 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
- Use suggested Web pages
- Check the spelling of an instant message
- View personnel using Contacts Presence
- Add or delete a contact from Contacts Presence
- Send an instant message using Contacts Presence
- Consult on an instant message
- Conference an instant message
- Transfer an instant message
- End an instant message

To perform any task with an agent, select an agent from your contacts list in the **My Contacts** tab or an agent from an Instant Experts group in the **CC Contacts** tab.

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 Agent Desktop Conversation window.

Using Contacts Presence you can view all or a subset of the personnel in your Contact Center, according to their current status (for example, Available, Busy, Online, Do Not Disturb, Inactive, Offline, or Away). Presence information is provided either by the Presence Services server, Microsoft Office Communications Server, Microsoft Lync server.

Note:

Busy status is available only when using Microsoft Office Communications Server or Microsoft Lync. Online status is available only when using Presence Services.

Prerequisites for instant messaging

Procedure

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

  Note:

  Support is not available for microbrowsers or portable devices.

Accepting an instant message

Before you begin

- Ensure that you work with the Presence Services server, Microsoft Office Communications Server, or Microsoft Lync in your Contact Center.
- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling instant messages.

About this task

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.

Note:

When you work with a Call Force Presentation Class, Agent Desktop accepts contacts automatically, except in case of Instant Message (IM) contacts. You always must manually accept IM contact types.

Procedure

On the new IM work item, click **Accept**.

The top pane of the Agent Desktop shows the customer details and history of all past interactions between the customer and the Contact Center. The bottom pane shows the text window and the tools available for instant messages.

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Declining an instant message

About this task

Decline an instant message request when you are not able to handle the IM request.

Procedure

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

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

Sending an instant message

About this task

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

Procedure

1. In the text box, type your message to the customer.
2. Review your messages before you send them by using the scroll bars, if necessary.
3. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

Using an auto-phrase

About this task

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

Procedure

1. In the Conversation window, click **Suggest Phrase**.
2. Click the automatic phrase to use from the list.

   The automatic phrase is added to the Conversation preview window.
3. Edit the text if necessary.
4. Click **Send**.

Using suggested Web pages

About this task

Use a suggested Web page to add a commonly used Web page URL to an instant message. The administrator defines suggested Web pages using the Contact Center Multimedia Administrator.

Procedure

1. In the Conversation window, click **Suggest Web Page**.
2. Click the Web page you want to use from the list.

   The Web page is added to the Conversation preview window.
3. Click **Send**.

Using spelling checker in an instant message

About this task

Use the spelling checker to check spelling before you send an instant message.

Procedure

1. In the Conversation window, click the **SpellCheck** icon.
2. If the spelling checker highlights a word that is not found in the dictionary, perform one of the following steps:
   - Click **Ignore** to keep the original spelling of the word.
   - Click **Ignore All** to keep the original spelling of all instances of the word.
   - Click **Add** to add the selected word to the dictionary.
   - Click **Replace** to replace the word with the suggested text.
   - Click **Replace All** to replace all instances of the word with the suggested text.
   - Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
   - Click **Cancel** to terminate the spell check.
3. When the spell check is complete, click **Send**.

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Viewing personnel using Contacts Presence

About this task

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

Contacts presence control has two tabs: **My Contacts** and **CC Contacts**.

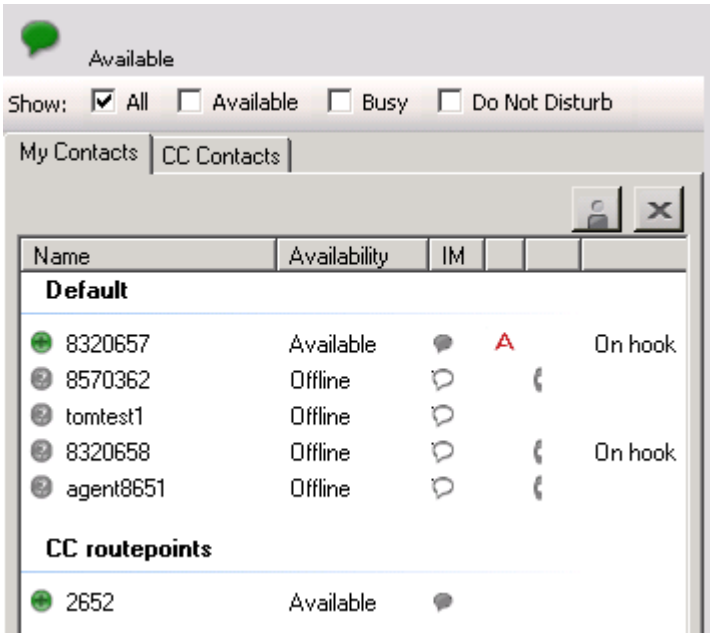


Figure 9: Example of My Contacts tab

The **My Contacts** tab lists contacts that you configure with the Presence Services server, Microsoft Office Communicator (OC), or Microsoft Lync. The **CC Contacts** tab lists the Instant Experts groups that a site administrator configures. Using Contacts Presence you can:

- Add a new contact (Presence Services only)
- Delete an existing contact (Presence Services only)
- Send an instant message
- Transfer an instant message
- Consult on an instant message
- Conference an instant message

If you are using the Presence Services server, Contacts Presence provides additional functionality such as click-to-chat and click-to-call. Using these functions you can click the respective icons to instantly place a call or send an Instant Message to an agent. If a contact in the list is using a Presence/IM client that publishes its phone state, you can also see the agent's phone status whether it is On-hook, Off-hook, or On a call. However, not all supported client software publish the phone state. The agent's phone status is updated only when the agent's state is changed. For example, If an agent's phone status is "On a call", it changes to "On-hook" only after the agent's state is changed to "Available".

Note:

Agent Desktop does not publish the phone state of agents. In certain scenarios, where you are using Agent Desktop and a desktop phone, the desktop phone publishes the phone state.

You can view additional information about the other agents, if the agent is using Avaya Aura® Agent Desktop. Hovering over the agent's name displays a tool tip containing additional information about the agent such as the contact type the agent is handling, whether the agent is multimedia enabled, and the agent's status (Ready / Not Ready).

The following table shows the My Contacts tab icons.

Table 10: Contacts Presence controls

Control	Function
	Add Contact
	Delete Contact
	Click-to-chat Black icon indicates that you can contact the agent through Instant Messaging. White icon indicates that you cannot contact the agent through Instant Messaging. Hovering over the icon shows a tooltip containing the agent's Instant Messaging address.
	Agent Indicates that the agent is using Avaya Aura® Agent Desktop.
	Click-to-call Black icon indicates that you can contact the agent through a voice call. White icon indicates that you cannot contact the agent through a voice call. Hovering over the icon shows a tooltip containing the agent's phone number.

A site administrator can configure default Instant Experts groups to load automatically after you log on to Agent Desktop. The name of the default Instant Expert groups begin with an underscore, for example, _autoload. Other skillset-associated and keyword-associated Instant Experts groups appear after you accept an incoming contact or when you click on a highlighted keyword in the text of a chat conversation. The default Instant Experts groups appear first in the list of groups.

Note:

The name of the Instant Expert group, along with the keywords associated to the group, is also highlighted in the text of a chat conversation on Agent Desktop.

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

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To view your contacts, click the **My Contacts** tab.

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3. To view Instant Experts groups, click the **CC Contacts** tab.

Contacting experts using Contacts Presence

About this task

You can use an Avaya Aura® Presence Services server, Microsoft Office Communications Server (OCS), or Microsoft Lync server to contact experts and get your queries answered.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. Click the **CC Contacts** tab.
3. To display all the IM expert groups that administrators have configured, click the **Keywords** button.

   The system displays the **Groups and Keywords** window.

   Or

   Type the first letter of the IM expert group in the **Keywords** field. The system displays all the matches. You can add more letters to refine the search and the list scrolls to the appropriate name or the closest match. Select the IM expert group that you want to add to the **CC Contacts** tab and click **Go**.
4. Select the IM expert group that you want to add to the **CC Contacts** tab.

   Or

   Select **Check/Uncheck** to either add or clear all the IM expert groups from the **CC Contacts** tab.

   Note:

   The system displays the Always-on groups even if you clear all the IM expert groups from the **CC Contacts** tab.
5. Click **Apply**.
6. To display only the Always-on groups, click the **Reset** button on the **CC Contacts** tab.

Adding a new contact in Contacts Presence

About this task

If you are using an Avaya Aura® Presence Services server, you can add a contact to the My Contacts list.

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Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. Click the **My Contacts** tab.
3. To add a new contact, click the **Add Contact** icon.

   You can add contacts only if the IM contacts in your Contact List are below the maximum threshold value of IM contacts set by administrators. The system disables the **Add Contact** icon if you have reached the threshold.

   The system displays the Add a contact window.
4. In the **ID** field, enter the user name of the agent account created in System Manager.
5. From the **Group** combo box, select an existing group name to add the new contact to an existing group in the **My Contacts** tab.

   Or

   Enter a new group name in the **Group** combo box to create a new group in the **My Contacts** tab and add the new contact to that new group.

   Note:

   Leave the **Group** field blank to add the new contact to the default group.
6. Click **Add**.

Deleting a contact from Contacts Presence

About this task

If you are using Presence Services server, you can delete a contact from the My Contacts list.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. Click the **My Contacts** tab.
3. Click the appropriate contact from the My Contacts list.
4. Click the **Delete Contact** icon to delete the contact.

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Sending an instant message using Contacts Presence

About this task

Send an instant message to a person after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To send a message to an agent from your list, click the **My Contacts** tab.

   Or

   To send a message to an agent from an Instant Experts group, click the **CC Contacts** tab.
3. Select the name of the person you want to send the instant message to, after confirming that they are available.
4. Click the **Click-to-chat** icon or right-click the name of the person and click **Send an Instant Message**.

   A new Conversation window appears.
5. In the text box, type your message to the agent.
6. Click **Send**.

   Your name or agent label appears before your message in the Conversation frame.

Transferring an instant message using Contacts Presence

About this task

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

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To transfer a message to an agent from your list, click the **My Contacts** tab.

   Or

   To transfer a message to an agent from an Instant Experts group, click the **CC Contacts** tab.
3. Select the name of the person you want to send the instant message to, after confirming that they are available.
4. 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 that person's Conversation window.

5. Click **Complete Transfer**.

   The instant message is now transferred to the person and it is no longer displayed on your Agent Desktop.

Consulting on an instant message using Contacts Presence

About this task

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

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To consult an agent from your contacts list, click the **My Contacts** tab.

   Or

   To consult an agent from an Instant Experts group, click the **CC Contacts** tab.
3. Select the name of the person you want to send the instant message to, after confirming that they are available.
4. 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 that person's Conversation window.
5. When your consultation is complete, click **Close**.

Conferencing an instant message using Contacts Presence

About this task

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

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To conference with an agent from your contacts list, click the **My Contacts** tab.

Or

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

3. Determine the person with whom you want to have a conference with, and confirm that they are available.
4. Right-click the name of the person, and click **Conference**.

   A new Conversation window appears.
5. Click **Complete Conference**.

   The new Conversation window closes and the original Conversation window reappears. When the person who you have added to the conference begins typing, the participant list above the text displays updated contact information for all participants in the conference.
6. To leave the conference, click **Close**.

   A message in blue appears in the Conversation window, which indicates when a participant leaves the conference. The departure is added as an Action to the Contact History.

Transferring an instant message using the work item control

About this task

Transfer an instant message to another available agent using the work item control.

Procedure

1. On the work item, click the **Transfer** control.
2. Select the name of the person you want to send the instant message to, after confirming 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 that person's Conversation window.
4. Click **Complete Transfer**.

   The instant message is now transferred to the person and it is no longer displayed on your Agent Desktop. Your status is set to Ready.

Consulting on an instant message using the work item control

About this task

Consult on an instant message with another available person using the work item control.

Procedure

1. On the work item, click the **Conference** control.
2. Select the name of the person you want to send the instant message to, after confirming that they are available.
3. Right-click the name of the person and then click **Consult**.

   The person you want to consult with must click **Accept**. The current instant message text then appears in that person's Conversation window.
4. When your conversation is complete, click **Close**.

Conferencing an instant message using the work item control

About this task

Conference an instant message to another available agent using the work item control.

Procedure

1. On the work item, click the **Conference** control.
2. Select the name of the person you want to send the instant message to, after confirming that they are available.
3. Right-click the name of the person and click **Conference**.

   A new Conversation window appears.
4. Click **Complete Conference**.

   The new Conversation window closes and the original Conversation window reappears. When the person who you have added to the conference 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, which indicates when a participant leaves the conference. The departure is added as an Action to the Contact History.

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Ending an instant message

About this task

End an instant message when the contact is complete.

Procedure

Click **Close**.

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Chapter 18: Using Agent Greeting

The Agent Greeting feature allows you to pre-record greetings. The system plays the greeting automatically when you answer a call.

Agent Greeting has the following additional benefits:

- your greeting is consistent for all callers
- you get time to prepare for the call

Administrators can configure all agents, in the Contact Center, to be on mute during agent greeting playback. Additionally, agents can go on mute using the mute button on their telephones. However, if agents mute their telephones, no party to the call can hear the agent greeting playback. Therefore, agents must not mute their telephones during agent greeting playback.

Note:

Agent Greeting applies only to SIP-enabled Contact Centers.

Logging on to the Agent Greeting recording application

Before you begin

- Check with your administrator that you have access to the Agent Greeting application.

About this task

Log on to the Agent Greeting recording application to record your default greeting. You can use the Agent Desktop softphone to log in to Agent Greeting.

Using Agent Desktop, press the **Agent Greeting** button, which automatically makes a call to the Agent Greeting recording application. Alternatively, you can type the Agent Greeting recording number and invoke the **Originate Call** option. If you use Agent Desktop to make calls, you can enter your login ID and password by using the DTMF option on Agent Desktop.

Note:

Agent Desktop does not support transferring or conferencing the Agent Greeting recording call.

Procedure

1. On your telephone, dial the number of the Agent Greeting application (If you do not know this number, ask your Contact Center administrator).

   The Agent Greeting application plays a welcome prompt and prompts you for your agent ID.

2. Using your telephone keys, enter your agent ID followed by pound (#).

   The Agent Greeting application prompts you for your password.

3. Using your telephone keys, enter your agent password followed by (#).

   The application plays the main menu.

Changing your Agent Greeting password

Before you begin

- Log on to the Agent Greeting application.

About this task

This procedure describes how you can change your Agent Greeting password.

Procedure

1. From the **Agent Greeting** main menu, select `8` to reach the **Password Change** menu.
2. When the application prompts you, enter your old password using your telephone keys.
3. When the application prompts you, enter your new password using your telephone keys.
4. When the application prompts you, enter your new password again using your telephone keys.

   The application plays back a message confirming that your password has been changed.

Recording your default greeting

Before you begin

- Log on to the Agent Greeting application.

About this task

Record your default greeting, which the system plays to voice contacts on skillsets for which you have not recorded a skillset-specific greeting. You must record a default greeting before the system allows you to record skillset-specific greetings.

The first time you log in to Agent Greeting, the application automatically prompts you to record your default greeting.

Procedure

1. From the **Agent Greeting** main menu, select `2` to reach the default greeting option.
2. When the application prompts you to record your default greeting, select `1`.
3. Record your greeting.

4. Select (#) to return to the main menu.

   If you want to change your recording, you can record it again. See Re-recording a greeting on page 183.

Recording the Time of Day greetings

Before you begin

- Log on to the Agent Greeting application.

Note:

You can set Time of Day greetings only in a Contact Center Manager Administration configuration.

About this task

The Time of Day greeting recording menu allows you to select the time of day greeting you want to record, delete, or playback.

Procedure

1. From the **Agent Greeting** main menu, select 1 to record the Time of Day greeting.
2. Select 1 to review your morning greeting.

   Or

   Select 2 to review your afternoon greeting.

   Or

   Select 3 to review your evening greeting.

   After you have selected the Time of Day greeting, the application presents the standard greeting menu with options to record, playback, or delete (if the greeting is already recorded) a greeting.
3. Select (#) to return to the main menu.

Recording skillset-specific greetings

Before you begin

- Log on to the Agent Greeting application.

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About this task

Skillset-specific greetings are played back when you answer calls specific to a skillset. If your supervisor has not recorded skillset tags for your skillsets, then the Agent Greeting recording application identifies the skillsets by the skillset ID number.

Procedure

1. From the **Agent Greeting** main menu, select `4` or `6` to navigate to the skillset.
2. Select `2` when you reach the required skillset.
3. Select `1` to record a new greeting.
4. Record your greeting.
5. Select `(#)` to return to the main menu.

   If you want to change your recording, you can record it again. See Re-recording a greeting on page 183.

Deleting skillset-specific greetings

Before you begin

- Log on to the Agent Greeting application.

About this task

Follow this procedure to delete a skillset-specific greeting.

Procedure

1. From the **Agent Greeting** main menu, select `4` or `6` to navigate to the skillset.
2. Select `2` to choose the greeting.
3. Select `76` on your phone to delete the greeting.
4. Select `(#)` to return to the main menu.

Identify skillset IDs to record skillset tags

Before you begin

Ensure that you have a license for the Report Creation Wizard.

About this task

You must identify the skillset IDs before you can record skillset tags for those skillset IDs.

You can obtain these from the Contact Center Manager Administration Historical Reports. The report is `Sample Reports – SIP_CC – Voice Skillset Name ID Mapping.rpt`.

Procedure

1. Log on to Contact Center Manager Administration.
2. From the **Launchpad**, click **Historical Reporting**.
3. In the left pane, click the Contact Center Manager Server on which to create, edit, or view the Report Creation Wizard report.
4. From the **Report** menu, select **Report Creation Wizard**.
5. Click **Import to Historical Reporting**.
6. In the Import window, in the **Report Title** box, type the name for the report.

   The name appears in **Historical Reporting**.
7. Click **Browse**.
8. In the Open RCW Report dialog box, browse to and select the `Sample Reports – SIP_CC – "Voice Skillset Name ID Mapping.rpt` report to import.
9. Click the **Report Options** header.
10. From the **Report Group** list, select the standard report folder into which you import the report. For private reports, you import the report into your private folder.
11. In the **Select Server** list, select the servers to which to import the report.
12. Click **Import**.
13. Navigate through the reports till you find the `Sample Reports – SIP_CC – "Voice Skillset Name ID Mapping.rpt` report.
14. Click **Run Now**.

    The report runs and you can look for the required voice skillset name ID mapping.

Recording skillset tags

Before you begin

- Log on to the Agent Greeting application.
- Find out the skillset IDs for which you want skillset tags. See Identify skillset IDs to record skillset tags on page 181.

Note:

You must be a supervisor or an supervisor/agent to record skillset tags.

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About this task

Supervisor/agents can record skillset tags to provide agents with a skillset name when they browse the skillset in the Agent Greeting Recording application.

If the supervisor does not record tags, the Agent Greeting application plays back only the skillset ID in the **Record Skillset** menu. If the skillset tag is recorded, the agents hear the skillset name recorded by the supervisor instead of the skillset ID number.

Supervisors can record the skillset tags for all skillsets.

Supervisor/agents can record the skillset tags only for the skillsets assigned to that supervisor/agent.

Procedure

1. From the **Agent Greeting** main menu, select `4` or `6` to navigate to the skillset.
2. Select `3` when you reach the required skillset.
3. Select `1` to record a new skillset tag.
4. Record your greeting.
5. Select `(#)` to return to the main menu.

   If you want to change your recording, you can record it again. See Re-recording a greeting on page 183.

Playing back a greeting

Before you begin

- Log on to the Agent Greeting application.

About this task

This procedure describes how you can play back a greeting.

Procedure

1. Navigate to a particular skillset, Time of Day, or default greeting option.
2. Select `2` to listen to your greeting.
3. Select `(#)` to return to the main menu.

Re-recording a greeting

Before you begin

- Ensure you have a recorded greeting.

About this task

This procedure describes how you can re-record a greeting.

Procedure

1. Delete the skillset-specific recorded greeting. See Deleting skillset-specific greetings on page 181.
2. Record your greeting again. See Recording your default greeting on page 179 and Recording skillset-specific greetings on page 180.

Interrupting a greeting

Before you begin

- Ensure that your status is set to Ready.
- Ensure that Agent Greeting is enabled and you have greetings recorded.
- Ensure that Contact Center Manager Administration is configured to allow an agent to interrupt greeting.

About this task

While a greeting is being played back for a call, you can interrupt the greeting. The greeting stops playing and you can start talking with the customer.

Important:

If Call Force Answer (CFA) Zip Tone is enabled, agents can also interrupt the silence period following the zip tone using the procedure below. If agents interrupt the silence period following the zip tone being played, the greeting is also interrupted. Subsequently any greeting queued to play following the silence period is not played.

Procedure

1. On the Agent Desktop, the `Playing Agent Greeting` message appears when an agent greeting is being played for an incoming call. Select the work item and click the **Accept** work item control.

   Note:

   If Call Force Answer (CFA) Zip Tone is enabled, the `Playing Agent Greeting` message appears when the zip tone is being played.

2. While the agent greeting is being played, enter `83` on your phone or Agent Desktop DTMF keypad, to interrupt the greeting.

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Chapter 19: High Availability

Avaya Aura® Agent Desktop supports High Availability for fault tolerant and resilient contact center solutions. In High Availability contact centers, Avaya Aura® Agent Desktop connects to multiple Contact Center servers. If one of the Contact Center servers fails or is shut down for maintenance, your Agent Desktop software switches over to the remaining Contact Center servers and continues working.

Normally, you do not notice a server switchover, you remain logged on and you continue handling customer phone calls without interruption. The Agent Desktop multimedia contacts list refreshes during a server switchover and this causes a short delay before new multimedia contacts arrive. In limited circumstances, Agent Desktop experiences a short delay during server switchover and if this occurs you must log on again after the switchover. Phone calls in progress with a customer are not affected by a switchover.

The following procedures describe how to handle Avaya Aura® Agent Desktop in a High Availability contact center.

Handling desktop phone loss of call control

About this task

Normally you use Avaya Aura® Agent Desktop software to control your desktop phone and to handle customer phone calls. If Agent Desktop is unable to control your desktop phone, use your desktop phone to continue handling customer phone calls. Do not attempt to use Agent Desktop to handle customer phone calls. When Agent Desktop regains control of your desktop phone, a message box appears to inform you that Agent Desktop can now be used again for telephony operations.

Procedure

1. If Agent Desktop displays a **Please use your phone for telephony operations. A message will appear when AAAD control returns** message box, show the message to your supervisor.
2. On the message box, click **OK**.
3. Continue to handle customer phone calls using your desktop phone. Do not attempt to use Agent Desktop to handle customer phone calls.
4. When the **AAAD can now be used again for telephony operations** message box appears, click **OK** and use Agent Desktop to handle customer phone calls.

Handling softphone loss of call control

About this task

Normally you use the Avaya Aura® Agent Desktop embedded softphone to handle customer phone calls. If you have a desktop phone, and if the Agent Desktop embedded softphone is unable to handle your customer phone calls, use your desktop phone to handle the customer calls. During a system outage, do not attempt to use Agent Desktop to handle customer phone calls. When Agent Desktop regains call control, a message box appears to inform you that the Agent Desktop embedded softphone can now be used again for telephony operations.

Note:

Agents that use Agent Desktop in the “My Computer” embedded softphone mode without a desktop phone, cannot handle customer calls during an Application Enablement Services outage or switchover.

Procedure

1. If Agent Desktop displays a **Please use your phone for telephony operations. A message will appear when AAAD control returns** message box, show the message to your supervisor.
2. On the message box, click **OK**.
3. If you have a desktop phone, continue to handle customer phone calls using your desktop phone. Do not attempt to use Agent Desktop to handle customer phone calls.
4. When the **AAAD can now be used again for telephony operations** message box appears, click **OK** and use Agent Desktop to handle customer phone calls.
5. You might need to restart Avaya Aura® Agent Desktop to regain embedded softphone call control.

   Note: If you complete a transfer during an Application Enablement Services outage or switchover, your Real Time Display (RTD) might incorrectly show your status as on a call although you are now idle. No new calls are presented to you until the main call between the customer and contact center is disconnected.

Handling multimedia contact refreshes during a switchover

About this task

Avaya Aura® Agent Desktop software supports multimedia contacts such as email, web chat, and fax messages. Agent Desktop also supports a licensed multiplicity feature. Multiplicity is the ability to handle multiple concurrent contacts. At any one time you can be active on both a voice and multimedia contact. However, when one contact is active; the others are automatically placed on hold.

If a Contact Center server switchover occurs, you might notice that all of your Agent Desktop contacts refresh; they are removed and recreated in Agent Desktop after the switchover. This contact refreshing can take a few seconds, depending on the number of contacts you have open. During the contact refreshing period you cannot use Agent Desktop to handle multimedia contacts, but you can continue to handle customer voice calls using your desktop phone. When the contacts have refreshed, the contact open time is correct and typed contact information is still present. If you were typing an email reply when the switchover occurred, your unfinished email is preserved and you can continue typing from where you were interrupted. You can continue to handle customer contacts using Agent Desktop as normal.

Note:

High Availability does not support Instant Message (IM) contact types. If a Contact Center server switchover occurs, IM contacts are lost.

Procedure

1. If Agent Desktop starts to refresh the contacts in your Work Item list, do not use Agent Desktop. Stop typing and allow Agent Desktop to completely refresh the contacts Work Item list.
2. If you are handling a customer voice contact, continue to handle the phone call using your desktop phone.
3. When the contacts Work Item list has fully refreshed, confirm that all your contacts are still open and continue handling multimedia and voice contacts using Agent Desktop.

Handling server communication issues

About this task

Avaya Aura® Agent Desktop connects to multiple Contact Center servers. In the event that the connection to the servers is lost, Agent Desktop repeatedly attempts to reconnect. If you are forced to exit Agent Desktop as a result of server communication issues, all multimedia contacts such as email, Web chats and IM are lost. You can continue to handle phone calls using your desktop phone while server communication is lost.

Procedure

1. If Agent Desktop shows a **CCT Session Disconnected** message box, show the message to your Supervisor.
2. On the message box, click **Dismiss** and continue to handle phone calls using your desktop phone.
3. If Agent Desktop shows a **Server Error - Failed to connect to the CCMM Server** message box, show the message to your Supervisor.
4. On the message box, click **Dismiss** and continue to handle voice contacts.
5. Agent Desktop continues attempting to reconnect with the server. On successful reconnect you might need to login again.

6. If Agent Desktop repeatedly fails to reconnect with the server, speak with your Supervisor and if necessary click **Exit Application**.

Handling configuration issues when launching Avaya Aura® Agent Desktop

About this task

Agent Desktop is downloaded from and connects to one or more Contact Center Multimedia (CCMM) servers.

When launched, Agent Desktop attempts to connect to the default server and download the configuration file. In High Availability solutions, if Agent Desktop is unable to access the configuration file on the default server it attempts to access the configuration files on the other servers. If Agent Desktop can access the configuration files on another server it displays a message box. The agent can choose to accept the configuration settings for that server or choose to attempt to connect to another server.

Procedure

1. If Agent Desktop displays a **Configuration Settings Error** message box, show the message to your Supervisor.
2. If you wish to accept the configuration settings from the server specified, on the **Configuration Settings Error** message box click **OK**.
3. If you do not wish to accept the configuration settings for the server specified, on the **Configuration Settings Error** message box click **Cancel**.
4. In the **CCMM Server Error** message box a list of available servers is displayed. Choose which server you want to connect to and click **Connect**.
5. If the problem persists, speak with your Supervisor.

Chapter 20: Agent Statistics

Agent Desktop displays live skillset-related statistics. Agents can display assigned skillset statistics in a pie or a bar chart format. Supervisors can display statistics for all skillsets. This chapter describes how to use the **Statistics** tab.

Agent Desktop Statistics are generated by accessing the Contact Center Web Statistics (CCWS) on Contact Center Manager Server (CCMS).

The main **Statistics** tab parts are:

- **Control**: Used to select charts types
- **Skillsets**: Used to display and select skillsets
- **Charts**: Used to display charts

Control:

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

Skillsets:

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

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

Charts:

The chart area displays a pie or bar chart.

Prerequisites for Agent Statistics

Procedure

Ask your supervisor to ensure that the Contact Center Web Statistics are enabled on the CCMS server.

Accessing the Agent Statistics tab

Before you begin

- Ensure that your status is set to Logged on.

About this task

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

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Statistics** tab, to display the **Agent Statistics** tab and controls.

Viewing the Skillset statistic chart

Before you begin

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

About this task

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

Procedure

1. On the Agent Desktop **Statistics** tab, select **Contacts**.
2. In the **Skillset** control, select the skillset to see the statistics.

   A chart is displayed in the chart area showing the statistics.
3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

Comments? infodev@avaya.com

Viewing the Agent statistic chart

About this task

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

Procedure

1. On the Agent Desktop **Statistics** tab, select **Agents**.
2. In the **Skillset** control, select the skillset for which you want to see the agent-related statistics.

   A chart is displayed in the chart area showing the statistics.
3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

Changing the Agent statistic chart properties

About this task

Use the VuStats window to change the display interval and refresh interval for Agent statistic charts.

Procedure

1. Launch the Agent Desktop and log into Elite.
2. Click on **Agent Statistics** to launch the VuStats window.
3. Click the **Settings** icon.
4. Type the number of seconds in the **Display Interval** box.
5. Type the number of seconds in the **Refresh Interval** box.
6. Click **Save Settings**.

   The system saves the settings for this agent session only.

Variable definitions

Name	Description
Refresh Interval	Use the **Refresh Interval** box to define the refresh interval for each VuStats information before it changes the focus from the last line of display in the list to the first line.
Display Interval	Use the **Display Interval** box to define the interval to display each VuStats before the VuStats Monitor

Name	Description
	changes focus from one VuStats line of display to the next one in the list.

Enabling Service Level alerts

About this task

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

Procedure

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

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

Using the Statistics Ticker

About this task

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

Procedure

1. On the Agent Desktop Action bar, click **Agent Statistics** to show or hide the **Agent Statistical Ticker**.
2. On the **Agent Statistical Ticker**, click the **>** icon to advance to the next skillset.
3. On the **Agent Statistical Ticker**, click on any item in the **Ticker** box to display the Agent Desktop **Statistics** page.
4. To show or hide the **Agent Statistical Ticker**, click the button that appears to the left of the **Agent Statistical Ticker**.

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Chapter 21: Customer and contact details

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

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

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

Note:

Voice Contact intrinsics are supported in both SIP-enabled and AML-based contact centers. However, in AML-based contact centers intrinsics on voice calls are set for CDN calls only, whereas in SIP-enabled contact centers intrinsics on voice calls are set for both CDN and personal calls.

Prerequisites for working with customer and contact details

Procedure

- Ensure that you have permission to handle multimedia contacts.

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

Creating a customer record

Before you begin

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

About this task

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

Note:

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

Procedure

1. In the Customer Details window, click **Create**.
2. In the **Title** box, select a salutary title for the customer.
3. In the **Last Name** box, type the surname of the customer.
4. In the **First Name** box, type the given name for the customer.
5. In the **E-mail Address** box, type an email address for the customer.

   Note:

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

Searching for a customer

Before you begin

- Ensure that the Action bar is visible.

About this task

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

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

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

Procedure

1. Click **Customer Search**.
2. In the first column, select the criteria to use for the search (for example, last name or phone number).
3. In the second column, select the logical operators for the search criteria (for example, is or is not).
4. In the third column, type your search value (for example, Smith).
5. Click **Search**.
6. To sort the search results based on a field, click the column heading of the field by which you want to sort.
7. Double-click the customer record to open.

Adding or editing customer information

Before you begin

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

About this task

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

Procedure

1. Click the **Details** tab in the Customer Details pane.
2. Click **Edit** to change the customer information.

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

3. Select the information to add or change.
4. Copy and paste the information from the text of a contact, or type the information into the field.
5. If you add additional telephone numbers or email addresses, ensure that you select one as the default.
6. Click **Save**.

Setting the barred status for a customer phone number

About this task

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

Procedure

1. Click the **Details** tab in the Customer Details pane.
2. Click **Edit** to change the customer information.
3. Select the phone number for which the bar status needs to set.
4. Select the **Barred** check box to tag the phone number as barred.

   This phone number cannot be called.

Clearing the barred status for a customer phone number

Before you begin

- Ensure that the customer phone number is barred.

About this task

Clear a customer phone number of its barred status.

Procedure

1. Click the **Details** tab in the Customer Details pane.
2. Click **Edit** to change the customer information.
3. Select the phone number to be cleared off its barred status.
4. Clear the **Barred** check box to tag the phone number as not-barred.

   This phone number can be called.

Viewing an intrinsic

Before you begin

- You must accept a contact.

About this task

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

Procedure

1. On the Agent Desktop window, click **Customer Details**.
2. In the **Custom Fields** section, click the **Intrinsic** tab.

   The intrinsics appear.

Copying an intrinsic

About this task

Copy an intrinsic to use the intrinsic in another application.

Procedure

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

Viewing User to User Information

About this task

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

Note:

User to User Information is not supported when you use Agent Desktop to log on to Avaya Aura® Call Center Elite.

Procedure

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

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

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Modifying User to User Information

About this task

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

Note:

User to User Information is not supported when you use Agent Desktop to log on to Avaya Aura® Call Center Elite.

Procedure

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

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

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

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

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

Viewing customer contact intrinsics

Before you begin

- You must accept a contact.

About this task

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

Procedure

1. On the Agent Desktop, click **Customer Details**.
2. In the **Custom Fields** section, click the **Intrinsics** tab.

   The default application appears with a check mark, in the **Screen Pops** section.

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

Launching an intrinsic-associated application manually

Before you begin

- You must accept a contact.

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About this task

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

Procedure

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

   Agent Desktop displays the screen pop.

Searching for a contact

Before you begin

- Ensure that the Action bar is visible.

About this task

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

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

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

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

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

Procedure

1. Click **Contact Search**.

2. In the first column, select the criteria to use for the search (for example, Status or Skillset).
3. In the second column, select the logical operators for the search criteria (for example, is or is not).
4. In the third column, type your search value (for example, Closed).
5. Click **Search**.
6. To sort the search results based on a field, click the column heading of the field by which you want to sort.
7. Double-click the contact to open.

Printing search results

Before you begin

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

About this task

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

Procedure

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

Viewing a contact

Before you begin

- Ensure that your status is set to Not Ready.

About this task

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

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

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.
2. Right-click and select **Read-only Contact**.

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

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

Opening a contact

Before you begin

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

About this task

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

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

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.
2. If **Take Ownership** appears on the **Contact History** tab, another agent currently owns the customer and you cannot open this contact. If necessary, click **Take Ownership** to own the customer and click **Yes** to confirm.
3. Right-click the contact and select **Pull Contact**.

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

   The Agent Desktop automatically changes your status to Ready, answers the pulled contact, and then automatically changes your status to Not Ready again.
5. View the contact details on the right pane of the Agent Desktop window.

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

Closing contacts

Before you begin

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

About this task

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.

Procedure

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

   Selected contacts are highlighted in blue.
2. Right-click and select **Close All**.
3. In the Close Contact Details window, type the reason for closing the selected contacts.
4. Click **Close**.

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