



# **Avaya Contact Center Select Agent Desktop Guide**

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# Contents

<b>Chapter 1: Introduction</b> .....	9
Purpose.....	9
Intended audience.....	9
Related resources.....	9
Documentation.....	9
Viewing Avaya Mentor videos.....	10
Support.....	11
<b>Chapter 2: Avaya Contact Center Select overview</b> .....	12
Prerequisites.....	13
<b>Chapter 3: Using your Agent Desktop</b> .....	14
Installing Agent Desktop.....	14
Starting Agent Desktop.....	14
Creating a shortcut to Agent Desktop.....	15
Logging on to Agent Desktop .....	15
Logging on to Agent Desktop for Microsoft Lync.....	16
Agent Desktop User Interface.....	17
Work Item paradigm.....	17
Top bar.....	17
Work list window.....	18
Action bar.....	19
User preferences.....	20
Screen pops on Agent Desktop.....	20
Customize Agent Desktop window settings.....	21
Agent Desktop system tray icon.....	22
Shortcut keys in Agent Desktop.....	22
Agent Statistics.....	22
Agent Desktop Dashboard.....	24
Changing your password.....	25
Using the Agent Desktop configurable home page.....	26
Setting the Work Item Display.....	26
Swapping Panels on Agent Desktop.....	27
Viewing shortcut keys on Agent Desktop.....	27
Changing your status to Ready.....	28
Changing your status to Not Ready.....	28
Changing your status to Not Ready when on a contact.....	29
Accessing the Agent Statistics tab.....	29
Viewing the Skillset statistic chart.....	29
Viewing the Agent statistic chart.....	30
Enabling Service Level alerts.....	30

Using the Statistics Ticker.....	31
Collecting and uploading log files from the Agent Desktop Dashboard.....	31
Checking the network connection in the Agent Desktop Dashboard.....	32
Recording a video of your agent desktop actions.....	32
Changing the Agent Desktop Dashboard log settings.....	33
Accessing online help.....	34
Closing contacts if you receive a force log out message.....	34
Understanding supervisor changes to your Ready status.....	34
Logging off from Agent Desktop.....	35
Removing the Agent Desktop client software.....	35
<b>Chapter 4: Telephony.....</b>	<b>37</b>
Accepting a call.....	38
Declining a call.....	38
Entering an Activity code.....	39
Entering an After Call Work Item Code.....	39
Placing a call on hold.....	40
Releasing a call on hold.....	40
Transferring a call.....	40
Conferencing in another agent.....	41
Conferencing in a supervisor.....	42
Ending a call.....	42
Calling your supervisor.....	42
Making a call.....	43
Using DTMF digits.....	43
Using the Emergency key.....	43
Observing a voice contact.....	44
Barging-in on a voice contact.....	45
Joining two voice calls.....	45
Making a call while on an existing voice call .....	46
Accepting an inbound voice call while on an existing skillset voice call .....	46
Calling an agent using Contacts Presence.....	46
Searching for a contact in Phonebook.....	47
Calling an agent using Phonebook.....	47
Filtering contacts using Phonebook.....	48
Tagging a contact in Phonebook.....	49
Configuring the display of columns in Phonebook.....	49
Adding a custom contact.....	50
Editing a custom contact.....	51
Deleting a custom contact.....	51
Using the Call History tab.....	52
<b>Chapter 5: Telephony - Other Phone mode.....</b>	<b>54</b>
Logging on to Agent Desktop in Other Phone mode.....	55
Accepting a call in Other Phone mode.....	55

Transferring a call in Other Phone mode.....	56
Conferencing in another agent in Other Phone mode.....	57
Recovering the nailed-up call.....	57
<b>Chapter 6: Customer and contact details.....</b>	<b>59</b>
Prerequisites for working with customer and contact details.....	59
Creating a customer record.....	60
Searching for a customer.....	60
Adding or editing customer information.....	61
Setting the barred status for a customer phone number.....	62
Clearing the barred status for a customer phone number.....	62
Viewing an intrinsic.....	63
Copying an intrinsic.....	63
Viewing User to User Information.....	63
Modifying User to User Information.....	64
Viewing customer contact intrinsics.....	64
Launching an intrinsic-associated application manually.....	64
Searching for a contact.....	65
Printing search results.....	66
Viewing a contact.....	66
Opening a contact.....	67
Closing contacts.....	67
<b>Chapter 7: Outbound calls and callbacks.....</b>	<b>69</b>
Accepting an outbound contact.....	70
Declining an outbound contact.....	70
Placing an outbound call.....	70
Using a script.....	71
Recording the result.....	72
Ending the call.....	72
Scheduling a callback.....	73
Calling the customer manually.....	73
<b>Chapter 8: Email.....</b>	<b>75</b>
Supervisor approval of email messages.....	78
Accepting an incoming email message.....	79
Declining an incoming email message.....	79
Verifying customer information.....	79
Resetting customer password .....	80
Replying to an email message.....	80
Creating an email message.....	82
Using the address book to reply to a contact.....	83
Removing a name from the recipient list.....	83
Creating a template response.....	84
Defining your default template folder.....	84
Using a template response.....	85

Defining your default attachment folder.....	85
Adding an attachment to your email response.....	86
Viewing email attachments.....	86
Removing an attachment from an email response.....	86
Adding inline images.....	87
Using the spelling checker.....	88
Closing the email contact.....	89
Postponing work on a contact.....	89
Following up on a contact.....	90
Transferring a contact within the Contact Center.....	90
Transferring a contact outside the Contact Center.....	90
Printing contact details.....	91
Sending an email message to an agent using Phonebook.....	91
Approving email messages.....	92
Rejecting an email message sent for approval.....	93
Redrafting a rejected email message.....	94
<b>Chapter 9: Fax message.....</b>	<b>95</b>
Prerequisites.....	95
Accepting an incoming fax message.....	95
Declining an incoming fax message.....	96
Reviewing a fax message.....	96
Replying to a fax message.....	96
Closing a fax message.....	97
Transferring a fax message.....	97
<b>Chapter 10: Scanned document.....</b>	<b>99</b>
Prerequisites.....	99
Accepting an incoming scanned document message.....	99
Declining an incoming scanned document message.....	100
Reviewing a scanned document message.....	100
Replying to a scanned document message.....	100
Closing a scanned document message.....	101
Transferring a scanned document.....	101
<b>Chapter 11: Voice mail messages.....</b>	<b>103</b>
Prerequisites.....	103
Accepting an incoming voice mail message.....	103
Declining an incoming voice mail message.....	104
Listening to a voice mail message.....	104
Replying to a voice mail message.....	104
Closing a voice mail message.....	105
Transferring a voice mail message.....	105
<b>Chapter 12: Short Message Service text message.....</b>	<b>106</b>
Prerequisites.....	106
Accepting an incoming SMS text message.....	106

- Declining an incoming SMS text message..... 107
- Replying to an SMS text message..... 107
- Using the spelling checker..... 108
- Closing an SMS text message contact..... 109
- Transferring an SMS text message..... 109
- Chapter 13: Web communications**..... 110
  - Accepting a Web communications contact..... 110
  - Customizing a tab name..... 112
  - Declining a Web communications contact..... 113
  - Sending a chat message..... 113
  - Adding an auto-phrase to a chat message..... 114
  - Pushing a Web page to a customer..... 114
  - Performing a Web Communications transfer to a skillset..... 115
  - Transferring a chat session..... 115
  - Conferencing a chat session..... 116
  - Observing a Web Communications contact..... 117
  - Barging-in on a Web Communications contact..... 118
  - Ending the Text Chat session..... 118
  - Sending the chat log in an email message..... 119
- Chapter 14: Business Continuity**..... 120
  - Handling desktop phone loss of call control ..... 120
  - Handling multimedia contact refreshes during a switchover..... 121
  - Handling server communication issues..... 121
  - Handling configuration issues when launching Agent Desktop..... 122

# Chapter 1: Introduction

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## Purpose

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

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## Intended audience

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

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## Related resources

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## Documentation

The following table lists the documents related to Avaya Contact Center Select. Download the documents from the Avaya Support site at <http://support.avaya.com>.

Title	Use this document to:	Audience
Overview		
<i>Avaya Contact Center Select Solution Description</i>	This document provides a technical description of Avaya Contact Center Select. It describes the product features, specifications, licensing, and interoperability with other supported products.	<ul style="list-style-type: none"><li>• Sales engineers</li><li>• Implementation engineers</li><li>• Solution architects</li></ul>
Implementing		
<i>Deploying Avaya Contact Center Select DVD</i>	This document contains information about Avaya Contact Center Select DVD installation, initial configuration, and verification. This document contains information about maintaining and	<ul style="list-style-type: none"><li>• Sales engineers</li><li>• Implementation engineers</li></ul>

Title	Use this document to:	Audience
	troubleshooting the Avaya Contact Center Select server.	
<i>Deploying Avaya Contact Center Select Software Appliance</i>	This document contains information about Avaya Contact Center Select Software Appliance (VMware OVA) preparation, deployment, initial configuration, and verification. This document contains information about maintaining and troubleshooting the software appliance.	<ul style="list-style-type: none"> <li>• Sales engineers</li> <li>• Implementation engineers</li> </ul>
<i>Deploying Avaya Contact Center Select Hardware Appliance</i>	This document contains information about Avaya Contact Center Select Hardware Appliance (physical server) installation, initial configuration, and verification. This document contains information about maintaining and troubleshooting the hardware appliance.	<ul style="list-style-type: none"> <li>• Sales engineers</li> <li>• Implementation engineers</li> </ul>
<i>Avaya Contact Center Select Business Continuity</i>	This document contains information about deploying Avaya Contact Center Select Business Continuity.	<ul style="list-style-type: none"> <li>• Sales engineers</li> <li>• Implementation engineers</li> </ul>
Using		
<i>Administering Avaya Contact Center Select</i>	This document contains information and procedures to configure the users, skillsets, and contact center configuration data. This document contains information about creating Avaya Contact Center Select real-time and historical reports.	<ul style="list-style-type: none"> <li>• System administrators</li> <li>• Contact center supervisors</li> </ul>
<i>Avaya Contact Center Select Advanced Administration</i>	This document contains information about managing the Avaya Contact Center Select server, licensing, and multimedia configuration.	<ul style="list-style-type: none"> <li>• System administrators</li> </ul>
<i>Upgrading and patching Avaya Contact Center Select</i>	This document contains information about upgrading and patching Avaya Contact Center Select.	<ul style="list-style-type: none"> <li>• System administrators</li> </ul>
<i>Avaya Contact Center Select Agent Desktop Guide</i>	This document provides information and procedures for agents who use Agent Desktop to accept, manage, and close contacts of all media types in Avaya Contact Center Select.	<ul style="list-style-type: none"> <li>• Contact center agents</li> </ul>

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## Viewing Avaya Mentor videos

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

## About this task

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

## Procedure

- To find videos on the Avaya Support website, go to <http://support.avaya.com> and perform one of the following actions:
  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to [www.youtube.com/AvayaMentor](http://www.youtube.com/AvayaMentor) and perform one of the following actions:
  - Enter a key word or key words in the Search Channel to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

 **Note:**

Videos are not available for all products.

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## Support

Go to the Avaya Support website at <http://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

# Chapter 2: Avaya Contact Center Select overview

Avaya Contact Center Select is a context-sensitive, collaborative, voice and multimedia customer experience solution that allows small to midsize enterprises to anticipate, accelerate, and enhance customer interactions. Avaya Contact Center Select uses the Avaya IP Office telephone system to provide a real-time telephony platform. Avaya IP Office is a flexible and scalable phone system designed specifically for small and midsize enterprises. IP Office supports a wide range of phones and devices for use in contact centers.

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

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

- Voice contacts
- Email messages
- Web communications contacts
- SMS text messages
- Fax messages
- Scanned documents
- Voice mail messages

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

Agent Desktop uses Microsoft .NET Framework 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.

**\* Note:**

Agent Desktop does not support touch screen or tablet devices.

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## Prerequisites

### Procedure

- Ensure that you review the Contact Center installation procedures.
- Supported Operating Systems:
  - Windows 7 (32-bit and 64-bit) Professional, Ultimate, and Enterprise editions
  - Windows 8.1 (32-bit and 64-bit)
- Ensure that the following are installed on the client machine. You can download and automatically install these prerequisites from the Avaya Contact Center Select server when you are installing Agent Desktop. Administrative rights are required to install the following prerequisites:
  - Microsoft Internet Explorer 8.0, 9.0, 10.0, or 11.0 (32-bit).
  - 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)
- Ensure that each client computer can resolve the host name or computer name of the Avaya Contact Center Select server.

# Chapter 3: Using your Agent Desktop

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

---

## Installing Agent Desktop

### Before you begin

- Ensure that you have a valid user ID and password to use with 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. On the agent client computer, in Internet Explorer, type the HTTP address (URL) provided by your system administrator.

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

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

 **Note:**

You must have administrative privileges to install the prerequisite software.

3. Click **Launch**.

---

## Starting Agent Desktop

### About this task

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

## Procedure

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

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

The Agent Desktop toolbar appears.

---

## Creating a shortcut to Agent Desktop

### About this task

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

### Procedure

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

---

## Logging on to Agent Desktop

### About this task

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

### Note:

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

### Procedure

1. Start Agent Desktop.
2. On the **User Credentials** window, in the **User ID** box, type the agent user ID. For example, type 6002.
3. In the **Password** box, type the password for the agent. For example, type Pw\_6\_002.
4. In the **Domain** box, type the host name of the Avaya Contact Center Select server or the Windows domain name.

5. Click **OK**.
6. On the Agent Desktop Top bar, from the Status list, select **Login**.
7. Click the **Telephony** tab.
8. Select **Desk Phone** from the **Place and receive calls using** drop-down list.
9. If you are configured to handle Multimedia contacts (such as email), on the **Multimedia** tab, type your **ID** and **Password**.
10. Click **Login**.

The status icon changes to Not Ready.

---

## Logging on to Agent Desktop for 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 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 a Microsoft Lync client runs on the Agent Desktop PC, a warning message appears. Click **Yes** to close the Microsoft Lync client.

## Agent Desktop User Interface

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

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

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



**Figure 1: Example of Agent Desktop layout**

1	<a href="#">Top bar</a> on page 17
2	<a href="#">Work list window</a> on page 18
3	<a href="#">Action bar</a> on page 19

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

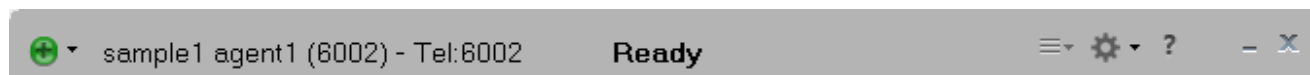
## Work Item paradigm

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

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

## Top bar

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







**Figure 2: Example of Top bar layout**

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

The Top bar has the following icons:

**Table 1: Top bar icons**

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

Use the Terminal Action menu to perform the following tasks:

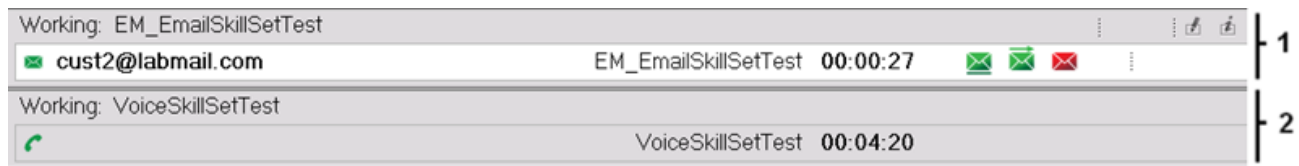
**Table 2: Terminal Action Menu**

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

## Work list window

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

The following figure shows the work list windows and controls.



**Figure 3: Example of work list layout**

The illustrated work list shows two work items:

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















- A work item is a collection of interactions with a customer, another agent, a supervisor, or an expert.

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

### Work item controls:

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

**Table 3: Examples of work item controls**

Voice	Email	Name	Description
		Accept	Accept the work item.
		Release	Release or reject the work item.
		Hold	Place the work item on hold.
		Transfer	Transfer the work item contact.
		Conference/Join	Conference the work item. Or join two work items.
		Activity code	Set the work item activity code.
		Work item details	Read work items details.

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

## Action bar


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















**Figure 4: Example of Action bar layout**

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

**Table 4: Action bar commands**

Icon	Name	Description
	Customer Details	View customer details.

Icon	Name	Description
	Contacts Presence	Contact presence.
	Observe	Listen in or participate in agent-customer calls or chat sessions. (Used by agent-supervisors only)
	Phonebook	Contact agents through the LDAP agent contact directory.
	Originate Call	Start a new work item.
	Supervisor	Call your supervisor.
	DTMF	Generate Dual-tone Multi-frequency (DTMF) tones.
	Call Log	Display the Call Log to view missed calls.
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule a callback.
	Agent Statistics	Display the agent statistics scroll bar.
	Teleworker Status	Display the status of the Teleworker or nail-up call. You can click the status icon to establish or recover the nail-up call.

---

## 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 **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 26.

---

## Screen pops on Agent Desktop

A screen pop is a third-party application that administrators configure using the Multimedia Administration tool. Agent Desktop displays screen pops when a contact alerts or is answered.

Screen pops can display relevant information about the alerting or answered contact based on intrinsics, such as the To Address or Skillset associated with the contact.

The following types of screen pops are available:

- Basic Screen pops
- Advanced Screen pops

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

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

Screen pops open in one of the following three ways:

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

---

## Customize Agent Desktop window settings

You can customize the following window settings on Agent Desktop:

- Window size and position.
- Window state (maximized or minimized).
- Splitter position. The splitter is an adjustable screen divider used to partition the user interface panels on Agent Desktop.
- Multimedia panel state (expanded or collapsed).
- Maximum number of work items you want the Work Items panel to display. If the number of Work Items is more than the maximum you have set, Agent Desktop displays the Work Items using a scroll bar. For more information, see [Setting the Work Item Display](#) on page 26.
- Panel swapping, that is, moving the **Left Pane** of Agent Desktop to the right side of Agent Desktop and vice versa. For more information about panel swapping, see [Swapping Panels on Agent Desktop](#) on page 27.

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.

---

## 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 system tray icon by default. To add the system tray icon, you must expand the Windows System Tray, select **Customize** and then select **Show icon and notifications**.

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

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

---

## Shortcut keys in Agent Desktop

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

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

Agent Desktop displays the list of the shortcut keys in a tab on the **Preferences** control. For more information, see [Viewing shortcut keys on Agent Desktop](#) on page 27.

---

## Agent Statistics

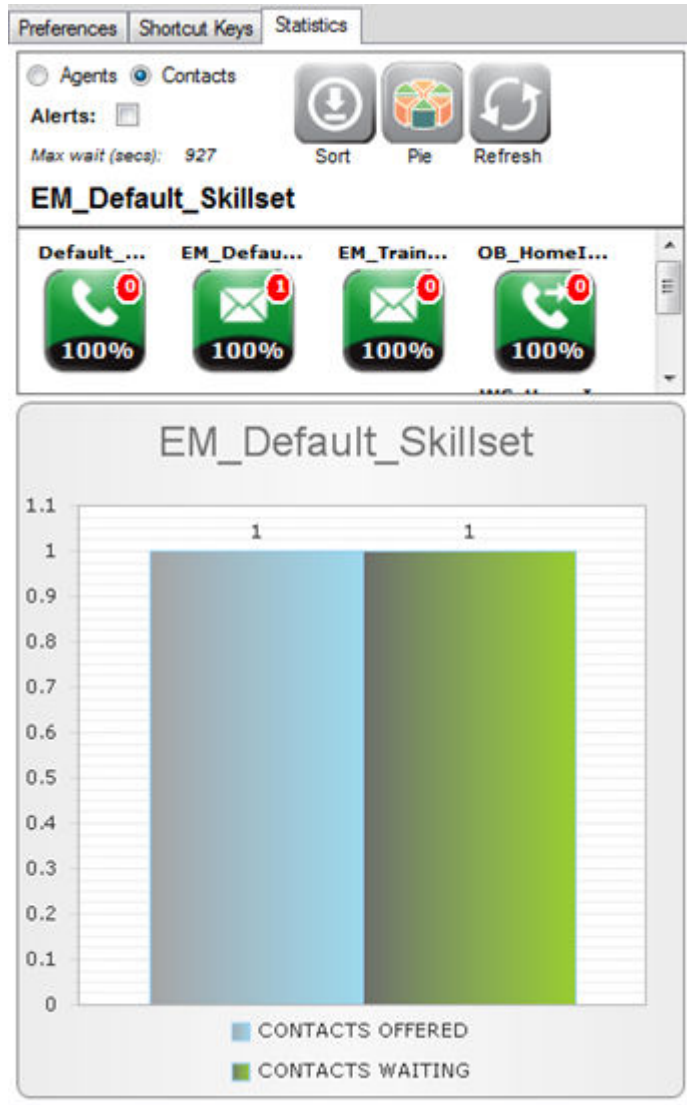
Agent Desktop displays live skillset-related statistics. Agents can display assigned skillset statistics in a pie or a bar chart format. Supervisors can display statistics for all skillsets. This chapter describes how to use the **Statistics** tab.

### **Note:**

Ask your supervisor to ensure that Contact Center Web Statistics are enabled.

The main **Statistics** tab parts are:

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



**Figure 5: Example of the Statistics tab on Agent Desktop**

**Control:**

- Refresh: Reloads and resets the skillsets list in the skillset area.
- Sort: Alphabetical sort of skillset icons. Due to contact type prefixes on the skillsets names the skillsets are also sorted by contact type.
- Pie/Bar: Dynamically changes between pie and bar charts in the chart display area.
- Agents Available: Displays the number of agents available.
- Agents Not Ready: Displays the number of agents not ready.
- Max Wait Time: Displays the maximum time (in seconds) the customer has to wait before being connected to an agent.
- Calls Waiting: Displays the number of waiting calls.

- Alerts: Activate or de-activate Outlook style alerts for skillsets, whose Service Level falls below the threshold defined in Contact Center Manager Administration.

**Skillsets:**

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

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

**Charts:**

The chart area displays a pie or bar chart.

---

## Agent Desktop Dashboard

The Agent Desktop Dashboard enables you to collect and upload log files or videos to the Contact Center server. You can also use the Dashboard to check the network connectivity of Agent Desktop with the Contact Center servers. This feature assists with troubleshooting if you experience a problem while using Agent Desktop. 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.

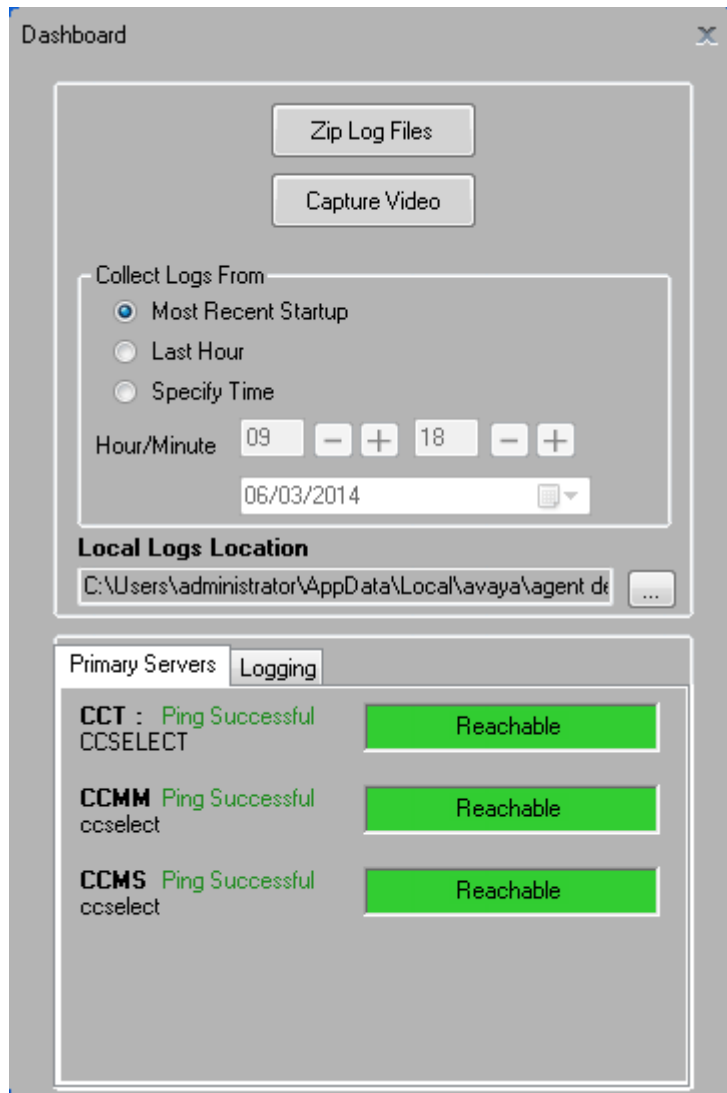


Figure 6: Example of the Agent Desktop Dashboard

## 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**.

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

---

## Swapping Panels on Agent Desktop

### About this task

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

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

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

### Procedure

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

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

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

---

## Viewing shortcut keys on Agent Desktop

### Before you begin

Log on to Agent Desktop.

### About this task

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

### Procedure

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

The system displays the list of shortcut keys.

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

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

---

## Changing your status to Ready

### About this task

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

### Procedure

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

The status icon changes to green.

---

## Changing your status to Not Ready

### About this task

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

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

### Procedure

1. 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 status icon changes to orange.

---

## 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.

---

## Accessing the Agent Statistics tab

### Before you begin

- Ensure that your status is set to Logged on.

### About this task

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

### Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Statistics** tab, to display the **Agent Statistics** tab and controls.

---

## Viewing the Skillset statistic chart

### Before you begin

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

### About this task

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

#### Procedure

1. On the Agent Desktop **Statistics** tab, select **Contacts**.
2. In the **Skillset** control, select the skillset to see the statistics.  
A chart is displayed in the chart area showing the statistics.
3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

---

## Viewing the Agent statistic chart

### About this task

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

#### Procedure

1. On the Agent Desktop **Statistics** tab, select **Agents**.
2. In the **Skillset** control, select the skillset for which you want to see the agent-related statistics.  
A chart is displayed in the chart area showing the statistics.
3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.

---

## Enabling Service Level alerts

### About this task

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

#### Procedure

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

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

---

## Using the Statistics Ticker

### About this task

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

### Procedure

1. On the Agent Desktop Action bar, click **Agent Statistics** to show or hide the **Agent Statistical Ticker**.
2. On the **Agent Statistical Ticker**, click the > icon to advance to the next skillset.
3. On the **Agent Statistical Ticker**, click on any item in the **Ticker** box to display the Agent Desktop **Statistics** page.
4. To show or hide the **Agent Statistical Ticker**, click the button that appears to the left of the **Agent Statistical Ticker**.

---

## Collecting and uploading log files from the Agent Desktop Dashboard

### About this task

The Agent Desktop Dashboard assists support staff by gathering all Agent Desktop logs and a screen capture of the Windows desktop. The Dashboard saves these logs in a .ZIP file which you can upload to the Contact Center server. Use this feature if a member of support staff requests the logs from your desktop PC. 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
<i>Most Recent Startup</i>	Select this check box to extract and upload only log events generated since the most recent launch of Agent Desktop.
<i>Last Hour</i>	Select this check box to extract and upload only log events generated in the last hour.
<i>Specify Time</i>	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 <b>Hour/Minute</b> field and, optionally, specify a date.

---

## Checking the network connection in the Agent Desktop Dashboard

### About this task

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

### Procedure

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

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

---

## Recording a video of your agent desktop actions

### About this task

You can record a sequence of screen captures from Agent Desktop to assist with troubleshooting Agent Desktop problems. When you start the Capture Video function, the Dashboard starts

recording one screen capture per second. When you finish recording, the Dashboard saves these screen captures in a .ZIP file which you can upload to the Contact Center server.

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

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

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

---

## Changing the Agent Desktop Dashboard log settings

### Before you begin

Log on to Agent Desktop.

### About this task

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

### Procedure

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

#### **Important:**

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

---

## Accessing online help

### About this task

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

### Procedure

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

Or

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

---

## Closing contacts if you receive a force log out message

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

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

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

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

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

---

## Understanding supervisor changes to your Ready status

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

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

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

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

---

## Logging off from Agent Desktop

### Before you begin

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

### About this task

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

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

### Procedure

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

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

---

## Removing the Agent Desktop client software

### About this task

Remove Agent Desktop client software from a client computer. The software uninstall is completed using the Windows Control Panel.

### Note:

This example procedure is performed on a Windows 7 client.

### Procedure

1. Log on to the Agent Desktop client computer.
2. Click the Start icon and select **Control Panel**.
3. Under **Programs**, click **Uninstall a program**.
4. From the **Name** list, select **Avaya Aura Agent Desktop 6.0** and click **Uninstall/Change**.

5. On the **Avaya Aura Agent Desktop 6.0 Maintenance** box, ensure **Remove the application from this computer** is selected and click **OK**.

# Chapter 4: Telephony

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

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

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

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

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

## Desktop phone behavior

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

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

---

## Accepting a call

### Before you begin

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

### About this task

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

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

### Procedure

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

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

---

## Declining a call

### Before you begin

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

### About this task

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

### Procedure

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

---

## Entering an Activity code

### About this task

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

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

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

### Procedure

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

---

## Entering an After Call Work Item Code

### About this task

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

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

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

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

### Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. To perform post call processing work and not receive any contacts, click **Set ACW Code**.

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

---

## Placing a call on hold

### About this task

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

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

### Procedure

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

---

## Releasing a call on hold

### About this task

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

### Procedure

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

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

---

## Transferring a call

### About this task

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

### Note:

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

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

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

# Conferencing in another agent

## About this task

You can 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 42.

### Procedure

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

---

## Making a call

### About this task

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

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

### Procedure

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

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

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

---

## Using DTMF digits

### About this task

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

### Procedure

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

---

## Using the Emergency key

### About this task

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

### Procedure

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

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

---

## Observing a voice contact

### Before you begin

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

### About this task

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

Using the Observe function, you can listen in on a voice contact without being heard. Using the Barge-in function, you can participate in a voice contact between the agent and the customer.

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

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

### Note:

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

### Procedure

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

The Agent Desktop displays the Supervisor Observe window.

2. Under **Filter**, select the **Item** as **Contact Type** with the **Value** as **Voice**.
3. Select a voice contact and click **Observe**.

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

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

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

---

## Barging-in on a voice contact

### Before you begin

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

### About this task

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

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

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

### Note:

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

### Procedure

1. In the Supervisor Observe window, click **Barge-in**, to barge-in on a voice contact you are observing.
2. Click **Release** when your conversation is complete.

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

---

## Joining two voice calls

### About this task

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

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

### Procedure

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

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

---

## Making a call while on an existing voice call

### About this task

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

### Procedure

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

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

---

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

### About this task

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

### Procedure

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

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

---

## Calling an agent using Contacts Presence

### About this task

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

## Procedure

1. On the Agent Desktop, click **Contacts Presence**.
2. To call an agent from your list, click the **My Contacts** tab.  
Or  
To call an agent from an Instant Experts group, click the **CC Contacts** tab.
3. Select the name of the person you want to call, after confirming that they are available.
4. Click the **Click-to-call** icon or right-click the name of the person and click **Call**, and then click the default phone number.  
The default phone number is dialed.
5. Click **Release** when you complete the call.

---

## Searching for a contact in Phonebook

### About this task

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

### Procedure

1. On the Agent Desktop, click **Phonebook**.  
The system displays the Phonebook tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.
2. Select the column name by which you want to search for a contact.  
For example, if you want to search by **First Name**, select **First Name** from the drop-down list.  
The system displays all the visible columns of the Phonebook in the drop-down list.
3. In the search text input box, type the search text that corresponds to the field selected in the drop-down list.  
For example, if you select **First Name**, type `John` in the search input text box. The system displays all the entries with the value John in the **First Name** column.

---

## Calling an agent using Phonebook

### About this task

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

## Procedure

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

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

2. Search for a contact.

For more information about searching for a contact, see [Searching for a contact in Phonebook](#) on page 47.

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 49.

Custom contacts are contacts that you add to Phonebook. For more information, see [Adding a custom contact](#) on page 50.

### Procedure

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

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

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

You can choose from the following types:

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

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

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

---

## Tagging a contact in Phonebook

### About this task

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

### Procedure

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

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

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

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

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

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

---

## Configuring the display of columns in Phonebook

### About this task

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

### Procedure

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

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

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

The system displays the Column Configuration window.

3. To add a column to the list that is displayed in the Phonebook grid, select the column title from the **Available** list.
4. Click **Add >**.  
The column title moves to the **Displayed** list.
5. To remove a column from the list that is displayed in the Phonebook grid, select the column title from the **Displayed** list.
6. Click **< Remove**.  
The column title moves to the **Available** list.
7. To arrange the columns in the Phonebook grid, select the column title under the **Displayed** list and click **Move Up** or **Move Down** in the Column Configuration window.  
You can also arrange the columns in the Phonebook by dragging the column in the Phonebook grid.
8. Click **Save**.  
The system saves the settings and displays the Phonebook grid based on your settings.
9. To sort the columns in the Phonebook grid, click the column heading.  
For example, if you click the **Display Name** column header, the system sorts the contacts alphabetically according to the display name.
10. To change the number of records that are displayed per page in Phonebook select the number of records from the **Records per page** drop-down list.  
By default, the system displays 20 records per page.
11. To navigate through the pages of Phonebook, click the arrows on the bottom-right of the Phonebook grid to move to the Next, Previous, First, and Last page.

---

## Adding a custom contact

### Before you begin

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

### About this task

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

### Procedure

1. On the Agent Desktop Top bar menu, click the **Phonebook** icon.  
The system displays the **Phonebook** tab. The Phonebook tab displays a list of entries from the LDAP agent contact directory.

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

3. Select **New Contact**.

The system displays the New Contact dialog box.

4. Fill in the details for the new contact.

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

5. Click **Save**.

The system adds the new contact in the Phonebook grid.

---

## Editing a custom contact

### About this task

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

 **Note:**

You cannot edit an LDAP contact.

### Procedure

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

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

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

3. Select **Edit Contact**.

The system displays the Edit Contact dialog box.

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

5. Click **Save**.

---

## Deleting a custom contact

### About this task

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

 **Note:**

You cannot delete an LDAP contact.

## Procedure

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

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

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

The system displays a Delete dialog box.

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

### \* **Note:**

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

---

## Using the Call History tab

### Before you begin

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

### About this task

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

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

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

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

### Procedure

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

Or

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

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

Select one of the following:

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

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

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

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

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

For more information, see [Adding a custom contact](#) on page 50.

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 47.

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 5: Telephony - Other Phone mode

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

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

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

## Important:

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

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

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

## Telephone status and display

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

---

## Logging on to Agent Desktop in Other Phone mode

### About this task

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

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

### Procedure

1. Start Agent Desktop.
2. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
3. Click the **Telephony** tab.
4. Select **Other Phone** from the **Place and receive calls using** drop-down list.

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

5. From the **Telephone at** list, select the offsite telephone number at which you want to take calls. If configured, you can type a telephone number.
6. If you are configured to handle Multimedia contacts (such as email), on the **Multimedia** tab, type your **ID** and **Password**.
7. Click **Login**.

The status icon changes to Not Ready, and the Teleworker Status is yellow. Your offsite telephone rings.

8. Answer your offsite telephone for your logon to complete.

The Teleworker Status icon changes to green.

---

## Accepting a call in Other Phone mode

### Before you begin

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

### About this task

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

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

## Procedure

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

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

---

# Transferring a call in Other Phone mode

## About this task

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

### **Note:**

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

## Procedure

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

Or

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

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

### **Important:**

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

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

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

---

## Conferencing in another agent in Other Phone mode

### About this task

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

### Procedure

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

Or

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

#### **Important:**

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

3. Click **Conference Contact** to begin the conference.
4. Speak with the agent, if necessary, before you conference in the customer.
5. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.

---

## Recovering the nailed-up call

### About this task

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

#### **Note:**

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

### Procedure

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

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

2. Answer the call on your offsite telephone.

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

# Chapter 6: Customer and contact details

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

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

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

---

## 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.  
Or  
Click **Add** to add new information to the customer details.
3. Select the information to add or change.

4. Copy and paste the information from the text of a contact, or type the information into the field.
5. If you add additional telephone numbers or email addresses, ensure that you select one as the default.
6. Click **Save**.

---

## Setting the barred status for a customer phone number

### About this task

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

### Procedure

1. Click the **Details** tab in the Customer Details pane.
2. Click **Edit** to change the customer information.
3. Select the phone number for which the bar status needs to set.
4. Select the **Barred** check box to tag the phone number as barred.

This phone number cannot be called.

---

## Clearing the barred status for a customer phone number

### Before you begin

- Ensure that the customer phone number is barred.

### About this task

Clear a customer phone number of its barred status.

### Procedure

1. Click the **Details** tab in the Customer Details pane.
2. Click **Edit** to change the customer information.
3. Select the phone number to be cleared off its barred status.
4. Clear the **Barred** check box to tag the phone number as not-barred.

This phone number can be called.

## Viewing an intrinsic

### Before you begin

- You must accept a contact.

### About this task

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

### Procedure

1. On the Agent Desktop window, click **Customer Details**.
2. In the **Custom Fields** section, click the **Intrinsic** tab.

The intrinsics appear.

---

## Copying an intrinsic

### About this task

Copy an intrinsic to use the intrinsic in another application.

### Procedure

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

## Viewing User to User Information

### About this task

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

### Procedure

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

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

## Modifying User to User Information

### About this task

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

### Procedure

1. On the work item, click **Work Item Details**.  
The **User to User Info** appears on the work item.
2. Double click **User to User Info**.  
The UUI data appears on the work item in an text box.
3. Modify the UUI data and press `Enter` to associate it with the work item.

---

## Viewing customer contact intrinsic

### Before you begin

- You must accept a contact.

### About this task

You can view customer contact intrinsic 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 **Intrinsic** tab.  
The default application appears with a check mark, in the **Screen Pops** section.
3. When you are finished viewing customer contact intrinsic, 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.

### 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**.

# Chapter 7: 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.

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 8: Email

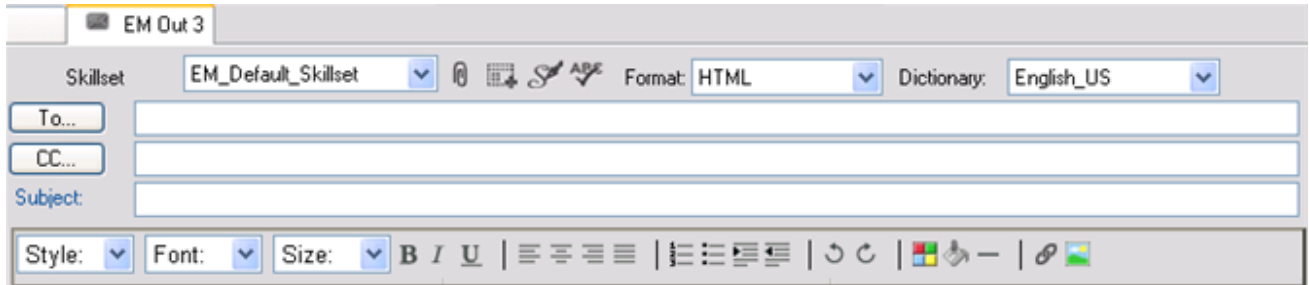
Use Agent Desktop to perform the following tasks when you handle an email message:

- 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 7: 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 5: Email editing and formatting controls**

Control	Name of the Control	Function
<b>B</b>	Bold	Bold the selected text
<i>I</i>	Italic	Italicize the selected text
<u>U</u>	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

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

---

## Supervisor approval of email messages

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

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

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

- When an agent sends an email message, the email message is marked for approval and returned to the queue to a predetermined skillset for approval. The approval skillset is staffed by supervisors who review the agent response. Supervisors who review the email message that the agent sends to the customer must be assigned to the approval skillset. This process is exactly the same as the current process for an agent sending an email. The agent has no indication that the contact the agent is handling is a part of an approval process. For more information, see [Creating an email message](#) on page 82 or [Replying to an email message](#) on page 80.

**\* Note:**

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

- If the supervisor approves the email, the email is either marked for sending to the customer, or returned to the queue marked for approval. The email is then targeted to the next approval skillset in the hierarchy. For more information, see [Approving email messages](#) on page 92.
- If the supervisor rejects the email message, the system marks the email message as rejected and returns the email message to the queue targeted to the previous skillset. The supervisor can add review comments so that the originator can redraft the email message: the administrator can configure whether to make comments for email approval mandatory or not. The email message flows through the rejection hierarchy until the email message reaches the originator for redrafting. For more information, see [Rejecting an email message sent for approval](#) on page 93 and [Redrafting a rejected email message](#) on page 94.

**\* Note:**

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

---

## Accepting an incoming email message

### About this task

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

### Procedure

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

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

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

---

## Declining an incoming email message

### About this task

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

### Procedure

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

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

---

## Verifying customer information

### About this task

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

If you accept a contact, or choose to read a contact, a maximum of 15 contacts appear before your selection and a maximum of 15 contacts appear after your selection on the **History** tab. Use the

navigation arrow buttons to scroll through the contacts that appear in the customer history. A page shows a maximum of 31 contacts. The status bar indicates the contacts you are viewing and the total number of contacts in the history list.

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

### Procedure

1. On the Agent Desktop, in the Customer Details window, click the **Details** tab to verify customer contact information.
2. Click the **History** tab to view the details of previous interactions with the customer for all the Multimedia types.
3. Click the **CI Details** tab to view the Customer Interface 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 83.
- Ensure that you understand how to create a template response. See [Using a template response](#) on page 85.
- Ensure that you understand how to add attachments to an email message. See [Adding an attachment to your email response](#) on page 86.

- Ensure that you understand how to use the spell check feature. See [Using the spelling checker](#) on page 88.

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

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

9. Click **Send**.

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

---

## Using the address book to reply to a contact

### About this task

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

### Procedure

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

 **Note:**

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

4. If you select **LDAP**:

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

 **Note:**

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

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

---

## Removing a name from the recipient list

### About this task

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

**\* Note:**

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

**Procedure**

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

---

## Creating a template response

**About this task**

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

**\* Note:**

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

**Procedure**

1. Create the response message in a text editor, such as Notepad.
2. Click **Save As**.
3. Name the file using a descriptive name and ensure that the file name has a `.txt` or an `.html` extension. For example, `WarrantyURL.txt`.
4. Navigate to the appropriate folder to store the template response file.
5. Save the file.

---

## Defining your default template folder

**About this task**

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

**Procedure**

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Preferences** tab.
3. In the **Default Template Location** box, type the complete path to the template folder.  
Or  
Click **Change** to select a new folder location.

4. Click **Save**.

---

## Using a template response

### About this task

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

### Procedure

1. In the email window, click **Insert a Template**.
2. Navigate to the template folder.  
If you have defined a template folder in the user settings, the default template folder automatically appears.
3. Select the template file, and then click **Open** to display the template text.
4. Edit the text in the body of the email message, if necessary.

---

## Defining your default attachment folder

### About this task

Define a default attachment folder in which to store files to add as attachments to email messages. You can add a file from the Shared Files folder that your administrator creates, or you can attach files by navigating to any other directory, folder, or subfolder on your computer.

### Note:

You must save file attachments with UTF-8 encoding.

### Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
2. Select the **Preferences** tab.
3. In the **Default Attachment Location** box, type the complete path to the folder containing the attachment.  
Or  
Click **Change** to change the current folder location.
4. Click **Save**.

---

## Adding an attachment to your email response

### About this task

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

### Procedure

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

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

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.

---

## 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
<i>Browse</i>	Browse to locate the inline image that you want to include in the email message.
<i>Image Address (URL)</i>	The URL for the inline image that you want to include in the email message.
<i>Alternate text</i>	The alternative text for the image. Alternate text is what the customer sees if their email client cannot display the image.

Name	Description
<i>Align</i>	Alignment of the image. The options are inline, left and right.
<i>Border</i>	Border around the image. For example, enter 2, to add a double-sized border around the image.
<i>Margin</i>	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.
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

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 48.

### 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 47.

3. Select a name, and click the **Click to email** icon under the Email column.

The systems displays the email window with the default address of the agent in the **To** address field.

4. In the **Subject** box, type the subject of the email message.
5. In the **Body** text box, type the message text.
6. To add a file to the email message, click **Insert a file**.
7. Click **Send**.

---

## Approving email messages

### Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.
- Ensure that the administrators have configured the approval hierarchy for email messages.

### About this task

A supervisor receives an email message for approval when an agent replies to a contact or sends an email message. The email message is marked for approval and returned to the queue to a pre-determined skillset for approval. The agent has no indication that the contact the agent is handling is part of an approval process.

Agent Desktop presents the supervisor with the option to approve or reject the email message. Supervisors can view existing review comments and enter additional review comments.

### Procedure

1. Accept the incoming email message. See [Accepting an incoming email message](#) on page 79.
2. Review the email message under the Proposed Email section.
3. In the Customer Details window, click the **Review** tab to view previously entered review comments.

In the **Review** tab, you can also view the ID and the name of the previous supervisors, the time of approval, and the hierarchy level.

4. In the **Review Comments** field, add your comments for the email message.
5. Click **Approve**.

The email is either marked for sending to the customer, or returned to the queue marked for approval and targeted to the next approval skillset in the hierarchy, depending on the approval hierarchy set up by the administrator.

The system displays the Approval Confirmation dialog box.

6. Click **Yes**.

---

## Rejecting an email message sent for approval

### Before you begin

- Ensure that administrators have assigned supervisors to the approval skillset of contacts that the agent handles.
- Ensure that the administrators have configured the rejection hierarchy for email messages.

### About this task

A supervisor can reject an email message that is sent for approval.

### Procedure

1. Accept the incoming email message. See [Accepting an incoming email message](#) on page 79.
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 79.
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 9: 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 88.

### 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

## Fax message

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 10: 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 88.

### 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 11: 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.

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 12: 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.

---

## 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 13: 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.

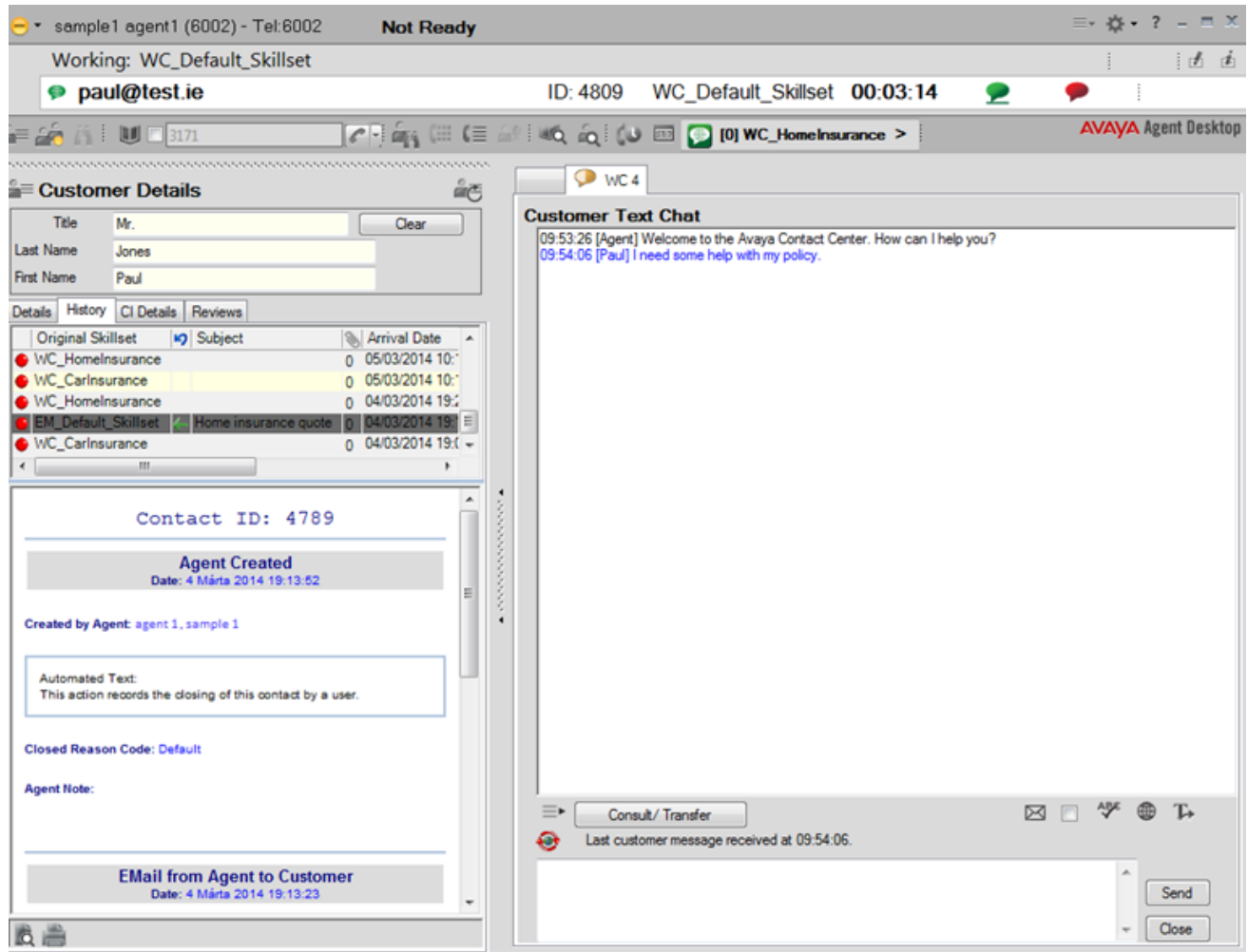
## Procedure

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

### **Note:**

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

## Example



## Customizing a tab name

### About this task

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

### Procedure

1. On the Agent Desktop right panel, double-click the required tab.
2. Type the <contact name>.

---

## Variable definitions

Name	Description
<contact name>	The keyword you use to identify the customer. For example, the first name or the last name.

---

## Declining a Web communications contact

### About this task

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

### Procedure

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

The contact returns to the queue and into Web-on-hold. Your status is set to Not Ready.

### Note:

If two or more Web communications contacts are simultaneously presenting to the agent on Agent Desktop and one Web communications contact is rejected, all contacts are rejected.

---

## Sending a chat message

### About this task

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

### Procedure

1. Type the message.
2. Click the **Send the Message** icon.

Your name or agent label appears in the Conversation frame, followed by your message.

---

## 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.

The page is pushed to the customer's browser and the URL is added to the Conversation frame and the text chat log.

---

## Performing a Web Communications transfer to a skillset

### About this task

You can transfer a Web Communications (WC) contact to a skillset, if your administrator allows.

The agent who answers the transferred contact views all the messages that were previously sent by the customer and the previous agent. The agent can also view the transfer details such as:

- the agent who transferred the contact
- the skillset from which the contact is transferred
- the skillset to which the contact is transferred
- the reason for transferring (if the agent who transferred the contact provides the reason)

### Important:

You cannot transfer a contact to a skillset that does not have active agents.

### Procedure

1. Click **Consult/Transfer**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Optionally, enter the reason for transfer under **Transfer Reason**.

The agent that answers the transferred contact can view the transfer details, including the reason for the transfer.

4. Click **Transfer**.

Agent Desktop refreshes the list of agents active on the selected skillset and queues the contact to the selected skillset.

---

## Transferring a chat session

### About this task

Transfer a chat session to another available agent. You can transfer a chat session only once.

### Procedure

1. Click **Consult**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Click the appropriate agent name.

4. Click **Consult**.

The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the transfer.

 **Note:**

The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Transfer**.

The chat session is now transferred to the other agent and it is no longer displayed on your Agent Desktop. Your status is set to Ready.

---

## Conferencing a chat session

### About this task

Conference a chat session to another available agent. You can conference only one agent into a chat session.

### Procedure

1. Click **Consult**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Click the appropriate agent name.
4. Click **Consult**.

The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the conference.

 **Note:**

The conversation between the agent and the customer is visible to the consulted agent.

5. Click **Complete Conference**.

The Consult Text Chat window closes and the original Conversation window reappears. When the agent who was added to the conference begins typing, it is visible to all three participants.

 **Note:**

On Agent Desktop, for the agent who initiated the conference, the **Consult** button is not visible for the entire duration of the Web communications contact. The agent cannot initiate another consult during this period.

6. When you want to leave the conference, click **Close**.

A message appears in the Conversation window that indicates when a participant leaves the conference.

---

# Observing a Web Communications contact

## Before you begin

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

## About this task

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 118.

5. Click **Close** when you finish observing the Web Communications contact.

---

## 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 117.

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 14: Business Continuity

Agent Desktop supports Avaya Contact Center Select Business Continuity for fault tolerant and resilient contact center solutions. In contact centers using Business Continuity, Agent Desktop normally connects to the active Contact Center server. If the active Contact Center server fails or is shut down for maintenance, you can point Agent Desktop at the other Contact Center server and, after a short interval, continue working.

The following procedures describe how to use Agent Desktop in a contact center using Business Continuity.

---

## Handling desktop phone loss of call control

### About this task

Normally you use Agent Desktop software to control your desktop phone and to handle customer phone calls. If Agent Desktop is unable to control your desktop phone, do not attempt to use Agent Desktop to handle customer phone calls. When Agent Desktop regains control of your desktop phone, a message box appears to inform you that Agent Desktop can now be used again for telephony operations.

### Procedure

1. If Agent Desktop displays a **Please use your phone for telephony operations. A message will appear when AAAD control returns** message box, show the message to your supervisor.
2. On the message box, click **OK**.
3. Do not attempt to use Agent Desktop to handle customer phone calls.
4. When the **AAAD can now be used again for telephony operations** message box appears, click **OK** and use Agent Desktop to handle customer phone calls.

---

## Handling multimedia contact refreshes during a switchover

### About this task

Agent Desktop software supports multimedia contacts such as email, web chat, and fax messages. Agent Desktop also supports a licensed multiplicity feature. Multiplicity is the ability to handle multiple concurrent contacts. At any one time you can be active on both a voice and multimedia contact. However, when one contact is active; the others are automatically placed on hold.

If a Contact Center server switchover occurs, 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. When the contacts have refreshed, the typed contact information is still present. If you were typing an email reply when the switchover occurred, your unfinished email is preserved and you can continue typing from where you were interrupted. You can then continue to handle customer contacts using Agent Desktop as normal.

The Agent Desktop Work Item list does not refresh after a switchover. Any multimedia contact tabs open during the switchover are preserved, but these contacts are not listed on the Work Item list.

### Procedure

1. If Agent Desktop starts to refresh your contacts, do not use Agent Desktop. Stop typing and allow Agent Desktop to completely refresh.
2. When the contacts have fully refreshed, confirm that all your contacts are still open in the multimedia contact tabs and continue handling multimedia and voice contacts using Agent Desktop.

---

## Handling server communication issues

### About this task

Agent Desktop connects to multiple Contact Center servers. In the event that the connection to the servers is lost, Agent Desktop repeatedly attempts to reconnect. If you are forced to exit Agent Desktop as a result of server communication issues, all multimedia contacts such as email and Web chats are lost. You can continue to handle phone calls using your desktop phone while server communication is lost.

### Procedure

1. If Agent Desktop shows a **CCT Session Disconnected** message box, show the message to your Supervisor.
2. On the message box, click **Dismiss** and continue to handle phone calls using your desktop phone.

3. If Agent Desktop shows a **ACCS Server Error - Unable to connect to the ACCS Server** message box, show the message to your Supervisor.
4. On the message box, select one of the Avaya Contact Center Select (ACCS) servers.
5. Click **Connect**.
6. Agent Desktop continues attempting to reconnect with the ACCS server. On successful reconnect you might need to login again.
7. If Agent Desktop repeatedly fails to reconnect with the server, speak with your Supervisor.

---

## Handling configuration issues when launching Agent Desktop

### About this task

Agent Desktop is downloaded from and connects to one or more Avaya Contact Center Select servers.

When launched, Agent Desktop attempts to connect to the default server and download the configuration file. In Business Continuity solutions, if Agent Desktop is unable to access the configuration file on the default server it attempts to access the configuration files on the other servers. If Agent Desktop can access the configuration files on another server it displays a message box. The agent can choose to accept the configuration settings for that server or choose to attempt to connect to another server.

### Procedure

1. If Agent Desktop displays a **Configuration Settings Error** message box, show the message to your Supervisor.
2. If you wish to accept the configuration settings from the server specified, on the **Configuration Settings Error** message box click **OK**.
3. If you do not wish to accept the configuration settings for the server specified, on the **Configuration Settings Error** message box click **Cancel**.
4. In the **CCMM Server Error** message box a list of available servers is displayed. Choose which server you want to connect to and click **Connect**.
5. If the problem persists, speak with your Supervisor.

# Index

## A

- accepting call
  - other phone mode ..... [55](#)
- active contact
  - changing to not ready ..... [29](#)
- activity code
  - enter ..... [39](#)
- add
  - custom contact ..... [50](#)
- after call work item
  - code ..... [39](#)
- Agent Desktop ..... [14](#)
  - action bar ..... [19](#)
  - creating a shortcut ..... [15](#)
  - customer contact intrinsics ..... [20](#)
  - home page ..... [26](#)
  - install ..... [14](#)
  - log off ..... [35](#)
  - screen pop ..... [20](#)
  - shortcut keys ..... [22](#)
  - start ..... [14](#)
  - system tray icon ..... [22](#)
  - top bar ..... [17](#)
  - user interface ..... [17](#)
  - user preferences ..... [20](#)
- Agent Desktop client
  - uninstall ..... [35](#)
- Agent Desktop dashboard ..... [24, 31, 32](#)
  - logging ..... [33](#)
  - video ..... [32](#)
- Agent Desktop window settings
  - swapping panels ..... [27](#)
- Agent statistic chart
  - view ..... [30](#)
- Agent Statistics ..... [22](#)
- Agent Statistics tab
  - access ..... [29](#)
- approval
  - email messages ..... [78](#)
- approve email messages ..... [92](#)

## B

- barge-in
  - voice contact ..... [45](#)
  - web communications contact ..... [118](#)
- Business Continuity ..... [120](#)

## C

- call
  - accepting ..... [38](#)

- decline ..... [38](#)
- end ..... [42, 72](#)
- make ..... [43](#)
- outbound ..... [69](#)
- release ..... [40](#)
- supervisor ..... [42](#)
- transfer ..... [40, 56](#)
- unhold ..... [40](#)
- callback
  - schedule ..... [73](#)
- calling you supervisor ..... [42](#)
- call join ..... [45](#)
- call on hold ..... [40](#)
- Change Agent State ..... [34](#)
- change password ..... [25](#)
- changing to not ready
  - active contact ..... [29](#)
- chat message
  - add auto-phrase ..... [114](#)
  - send ..... [113](#)
- clearing the barred status ..... [62](#)
- collecting log files
  - variable definitions ..... [32](#)
- conference
  - another agent ..... [41, 57](#)
  - supervisor ..... [42](#)
- configure display
  - Phonebook ..... [49](#)
- contact
  - follow up ..... [90](#)
  - open ..... [67](#)
  - postpone work ..... [89](#)
  - reply using address book ..... [83](#)
  - search ..... [65](#)
  - view ..... [66](#)
- contact details ..... [59](#)
  - prerequisites ..... [59](#)
  - print ..... [91](#)
- contact refreshes
  - handling ..... [121](#)
- contacts
  - supervisor closing ..... [67](#)
- Contacts Presence
  - call agent ..... [46](#)
- custom contact
  - add ..... [50](#)
  - delete ..... [51](#)
  - edit ..... [51](#)
- customer
  - push web page ..... [114](#)
  - search ..... [60](#)
- customer contact intrinsics ..... [20](#)
  - view ..... [64](#)

## Index

customer details .....	<a href="#">59</a>	filter contacts	
prerequisites .....	<a href="#">59</a>	phonebook .....	<a href="#">48</a>
customer information		Force Agent Log out .....	<a href="#">34</a>
adding .....	<a href="#">61</a>	<b>H</b>	
clearing the barred status .....	<a href="#">62</a>	handling	
editing .....	<a href="#">61</a>	contact refreshes .....	<a href="#">121</a>
setting the barred status .....	<a href="#">62</a>	server communication issues .....	<a href="#">121</a>
customer password .....	<a href="#">80</a>	hold .....	<a href="#">40</a>
customer record			
create .....	<a href="#">60</a>		
<b>D</b>			
default attachment folder			
define .....	<a href="#">85</a>	<b>I</b>	
default template folder		incoming contact	
define .....	<a href="#">84</a>	decline .....	<a href="#">79</a>
delete		incoming fax message	
custom contact .....	<a href="#">51</a>	decline .....	<a href="#">96</a>
desktop phone		incoming scanned document message	
logging on to Agent Desktop .....	<a href="#">15</a>	decline .....	<a href="#">100</a>
display		incoming SMS text message	
work items window .....	<a href="#">26</a>	decline .....	<a href="#">107</a>
document purpose .....	<a href="#">9</a>	incoming voice mail message	
DTMF digits .....	<a href="#">43</a>	decline .....	<a href="#">104</a>
<b>E</b>		inline images	
edit		add .....	<a href="#">87</a>
custom contact .....	<a href="#">51</a>	variable definitions .....	<a href="#">87</a>
email .....	<a href="#">75</a>	install	
accept .....	<a href="#">79</a>	Agent Desktop .....	<a href="#">14</a>
email attachments		intrinsic	
view .....	<a href="#">86</a>	copy .....	<a href="#">63</a>
email contact		view .....	<a href="#">63</a>
close .....	<a href="#">89</a>	intrinsic-associated application .....	<a href="#">64</a>
email message		introduction	
add attachment .....	<a href="#">86</a>	prerequisites .....	<a href="#">13</a>
create .....	<a href="#">82</a>		
remove attachment .....	<a href="#">86</a>	<b>L</b>	
reply .....	<a href="#">80</a>	log files .....	<a href="#">31</a>
send the chat log .....	<a href="#">119</a>	logging on to Agent Desktop	
send using phonebook .....	<a href="#">91</a>	desktop phone .....	<a href="#">15</a>
email messages		Other Phone mode .....	<a href="#">55</a>
approval .....	<a href="#">78</a>	Logging on to Agent Desktop	
Emergency key .....	<a href="#">43</a>	presence .....	<a href="#">16</a>
<b>F</b>			
fax message .....	<a href="#">95</a>	<b>N</b>	
accept .....	<a href="#">95</a>	nailed-up call	
close .....	<a href="#">97</a>	recovering .....	<a href="#">57</a>
prerequisites .....	<a href="#">95</a>	Not Ready status .....	<a href="#">28</a>
reply .....	<a href="#">96</a>		
review .....	<a href="#">96</a>	<b>O</b>	
transfer .....	<a href="#">97</a>	observe	
		voice contact .....	<a href="#">44</a>
		observing	
		web communications contact .....	<a href="#">117</a>

online help			
access	34	redraft	94
other phone mode	54	reject email messages	93
accepting call	55	related documentation	9
telephony	54	reply	
Other Phone mode		email message	80
logging on to Agent Desktop	55	fax message	96
oubound calls		scanned document message	100
call customer	73	SMS text message	107
outbound call	70	voice mail message	104
outbound callbacks	69	reset	80
outbound calls	69	resetting customer password	80
recording the result	72	review	
outbound contact		fax message	96
accept	70	scanned document message	100
decline	70		
		<b>S</b>	
<b>P</b>		scanned document	99
panels		close	101
swapping	27	prerequisites	99
panel swapping		scanned document message	
Agent Desktop	21	accept	99
phonebook		reply	100
call agent	47	review	100
filter contacts	48	transfer	101
search for a contact	47	screen pop	
send email message	91	Agent Desktop	20
viewing contact history	52	script	71
Phonebook		search	
configure display	49	contact	65
post call processing		customer	60
code	39	search for a contact	
prerequisites		phonebook	47
contact details	59	search results	
customer details	59	print	66
introduction	13	send	
scanned document	99	chat message	113
sms text message	106	server communication issues	
voice mail message	103	handling	121
presence		Service Level alerts	
Logging on to Agent Desktop	16	enable	30
print		setting the barred status	62
contact details	91	set work item display	
search results	66	user preferences	26
		shortcut keys	
<b>R</b>		Agent Desktop	22
Ready status	28	using	27
recipient list		skillset statistic chart	
remove name	83	view	29
recovering		sms text message	106
nailed-up call	57	accept	106
redraft		close	109
rejected email messages	94	prerequisites	106
redraft email messages	94	transfer	109
rejected email messages		SMS text message	
		reply	107
		spell checker	88

## Index

Statistics Ticker .....	<a href="#">31</a>	videos .....	<a href="#">10</a>
supervisor		view	
approve email messages .....	<a href="#">92</a>	Agent statistic chart .....	<a href="#">30</a>
reject email messages .....	<a href="#">93</a>	contact .....	<a href="#">66</a>
support .....	<a href="#">11</a>	customer contact intrinsics .....	<a href="#">64</a>
swapping		email attachments .....	<a href="#">86</a>
panels .....	<a href="#">27</a>	intrinsic .....	<a href="#">63</a>
switchover .....	<a href="#">121</a>	skillset statistic chart .....	<a href="#">29</a>
system tray icon		viewing contact history	
Agent Desktop .....	<a href="#">22</a>	phonebook .....	<a href="#">52</a>
<b>T</b>		voice contact	
tab name		barge-in .....	<a href="#">45</a>
customize .....	<a href="#">112</a>	observe .....	<a href="#">44</a>
variable definitions .....	<a href="#">113</a>	voice mail message .....	<a href="#">103</a>
tag contact		accept .....	<a href="#">103</a>
favorites .....	<a href="#">49</a>	close .....	<a href="#">105</a>
speed dial .....	<a href="#">49</a>	listen .....	<a href="#">104</a>
telephony .....	<a href="#">37</a>	prerequisites .....	<a href="#">103</a>
other phone mode .....	<a href="#">54</a>	reply .....	<a href="#">104</a>
template response .....	<a href="#">85</a>	transfer .....	<a href="#">105</a>
create .....	<a href="#">84</a>	<b>W</b>	
Text Chat session		web communications .....	<a href="#">110</a>
end .....	<a href="#">118</a>	accept .....	<a href="#">110</a>
third call appearance line .....	<a href="#">46</a>	conference .....	<a href="#">116</a>
three call appearance lines .....	<a href="#">46</a>	transfer .....	<a href="#">115</a>
transfer		transfer to skillset .....	<a href="#">115</a>
call .....	<a href="#">40, 56</a>	web communications contact	
contact outside the Contact Center .....	<a href="#">90</a>	barge-in .....	<a href="#">118</a>
contact within the Contact Center .....	<a href="#">90</a>	observing .....	<a href="#">117</a>
fax message .....	<a href="#">97</a>	Web communications contact	
scanned document message .....	<a href="#">101</a>	decline .....	<a href="#">113</a>
sms text message .....	<a href="#">109</a>	window settings	
voice mail message .....	<a href="#">105</a>	Agent Desktop .....	<a href="#">21</a>
web communications .....	<a href="#">115</a>	window size and position	
<b>U</b>		Agent Desktop .....	<a href="#">21, 22</a>
uninstall		work item paradigm .....	<a href="#">17</a>
Agent Desktop client .....	<a href="#">35</a>	work list window .....	<a href="#">18</a>
use			
Agent Desktop configurable home page .....	<a href="#">26</a>		
user preferences			
set work item display .....	<a href="#">26</a>		
user to user information			
modify .....	<a href="#">64</a>		
view .....	<a href="#">63</a>		
using			
shortcut keys .....	<a href="#">27</a>		
<b>V</b>			
variable definitions			
collecting and uploading log files .....	<a href="#">32</a>		
verify customer information .....	<a href="#">79</a>		