

# Quick Reference Guide

## Agent Desktop

### 5.1

This document provides quick reference procedures for Contact Center Agents

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## Getting Started with Agent Desktop

Agent Desktop is designed to enhance handling and reporting of calls into a queuing environment. The Desktop module gives contact center and customer service agents the ability to manage phone calls from a PC. You can view all the information about your current calls, the queues you are logged into, and the other agents who are working. You can perform extensive call and voicemail actions from one easy to use application on your PC.

### Log In to Desktop

You will first need to log into Agent Desktop and then you will be able to log in to queues as an agent.

1. Double-click the Desktop shortcut icon  on your PC Desktop.
2. Enter your full name into the *Login Name* field. You may notice that your name displays automatically after you enter a few letters.
3. Enter your PIN number into the *PIN* field. Initially your PIN will be 2222 until you change it to a unique number.

### Change PIN

The first time you start Desktop, the *Desktop Setup wizard* will run automatically and you will be prompted to change your default PIN as part of this wizard. Refer to the User System Setup Quick Reference Guide for details.

At any other time use the following steps to change your PIN.

**Note:** Your default start-up PIN will be 2222 until a new PIN is created.

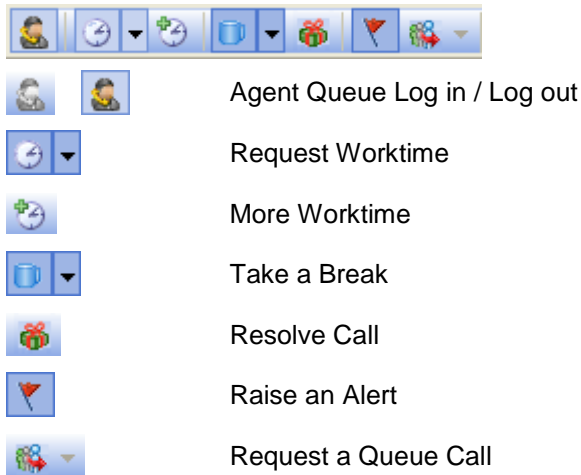
1. In the menu bar, click *File > Change PIN...*
2. Enter the *Old PIN*. (default PIN = 2222)
3. Enter the *New PIN*.
4. Enter *Verify New PIN*.

**Note:** Remember to enter your new PIN the next time you open Desktop.

## Accessing Queues from Desktop

When logged into a queue, you will be able to receive and process inbound queue calls.

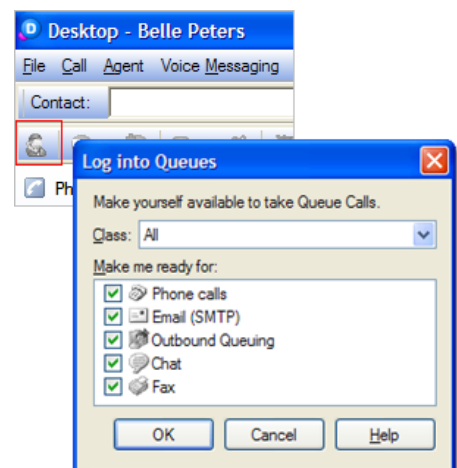
### Agent Status Toolbar



### Log into Queues

1. Click the Log into Queues button on the Agent Status toolbar.
2. Select the Class, or leave the default Class selected, to make yourself available to take queue calls (select using the drop-down list).
3. Check the media types that you want to accept (optional).
 

**Note:** Depending on the Class selected, certain media options may not be available.
4. Click **OK** to complete the Agent login.



### Log out of all Queues

1. Click the Log into Queues button again to log out.
 

**Note:** You will still receive inbound direct calls to your extension.

### Executive Desktop Procedures

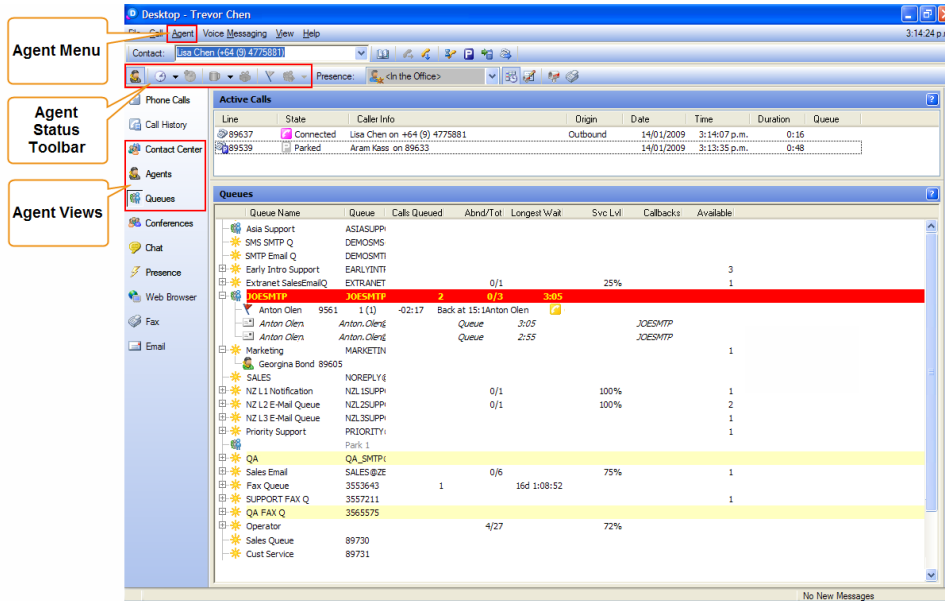
While you are logged in to queues, all standard Executive Desktop functionality is still applicable. Refer to the **Executive Desktop User Quick Reference Guide** for details.

# Agent Screens

The image below shows a typical queue screen view. The *Active Calls* pane shows any active calls and their status. The *Queues* pane shows queue and agent information.

The additional Agent functions are shown in the three red boxes:

- Agent Menu – perform essential Agent functions
- Agent Status Toolbar – perform essential Agent functions
- Agent Views – select different views of Contact Center information.



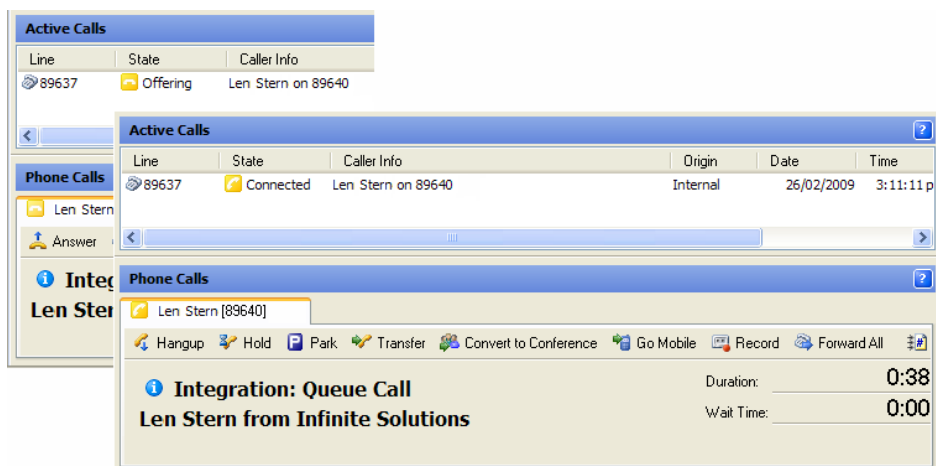
## Select which Queues to View

Select which queues are displayed using **File menu | Preferences | Select Queues**.

## Agent and Queue Symbols

<p><b>Agent Status</b></p> <ul style="list-style-type: none"> <li> Prime Agent (Green)</li> <li> Backup Agent (Blue)</li> <li> Overflow Agent (Red)</li> </ul> <p><b>Call Status</b></p> <ul style="list-style-type: none"> <li> A call is currently ringing on this agent's phone.</li> <li> The agent is currently on a call.</li> </ul> <p>Symbol Color</p> <ul style="list-style-type: none"> <li>• <b>Green:</b> Inbound non-Queue call</li> <li>• <b>Pink:</b> Outbound non-Queue call</li> <li>• <b>Yellow:</b> Inbound Queue call</li> <li>• <b>Blue:</b> Outbound Queue call</li> </ul>	<p><b>Queue Modes</b></p> <ul style="list-style-type: none"> <li> Day mode</li> <li> Night mode</li> <li> Redirect or Unattended mode</li> <li> Emergency mode</li> <li> Holiday mode</li> <li> Snow Day mode</li> <li> The queue is blocked</li> </ul>
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## Answering a Delivered Queue Call



To answer a new queue call:

1. Press **Enter** or **F2** on your keyboard.
2. Click *Answer* on the Phone Calls pane.



**Note:** If you do not answer the queue call in the required time, you may be logged out or placed on a break or worktime, depending on how the system is configured.

## Breaks

### Take a Break

When you are logged into a queue, you can request a break to indicate to the system that you are temporarily unavailable to receive queue calls.


**Note:** You will still receive inbound direct calls to your extension while on a break.

1. Click the Break button  to activate the *default* 5 minute "back in" break, or
2. Click the drop-down arrow  to select an alternative break reason from the drop-down list.

**Note:** Individual security permissions control which options can be set and used by the Agent.

### End a Break

If you are on a break and you want to make yourself available to receive queue calls again, you can cancel your break.

1. Click the Break button again  to cancel your break.

**Note:** If the Agent is overdue from their break the coffee cup icon will turn red.

## Worktime



Use Worktime when you need to perform a non-Queue Call work task, e.g. talk to a product specialist. After Call Worktime is usually set up to start automatically as soon as the call is complete.

### After-Call Worktime


When you complete a queue call you may be automatically placed on worktime, allowing you time to complete any call-related tasks before a new call is presented (duration is determined by your system administrator).

### Request Worktime

To request worktime for a non-call related work task:

1. Click the Request Worktime button  to initiate the default worktime, or
2. Click the drop-down arrow  to select an alternative worktime reason from the drop-down list.

### Request More Worktime

If you are on worktime, but require more time, click the more worktime button .


### End Worktime

If you are in worktime and you want to make yourself available to receive queue calls again, you can cancel your worktime.

1. Click the Worktime button again  to cancel your worktime.

### Request a Queue Call



In most cases the system delivers calls to you automatically. Demand delivery allows you to request delivery of a call. This function requires special permissions to be set by your administrator.

1. To receive a call on demand, do one of the following:
  - Click the Demand / Request a Queue Call button  on your Agent toolbar
  - Press F9 on your keyboard
  - In the Queues screen, right-click on a Queue to select a call from that specific Queue.

## Entering Wrapups from Desktop

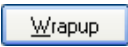
A wrapup uses codes to provide a record of how a call concluded. Each queue can have its own unique wrapup templates with appropriate details.

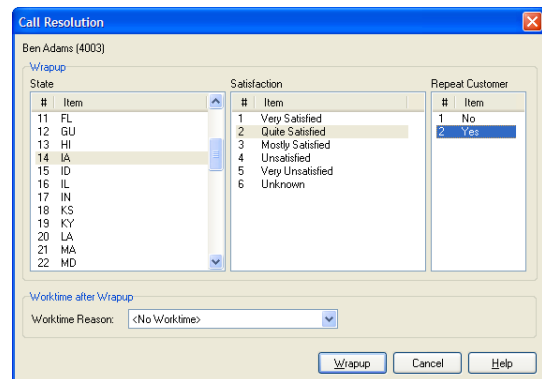
**Forced Wrapup** A Wrapup dialog is automatically displayed when you complete the queue call.

**Manual Wrapup** Click the Wrapup button  on the Agent Toolbar or the  Resolve button in the Phone Calls pane at any time during the call.

**Recent/Previous Call** Double-click the call in the Call Resolution window to assign a wrapup code for a previously completed call.

### Resolving a call with a Wrapup code

1. Select a Wrapup Code for the call by selecting an item from each list. (Up to three lists can be displayed).
2. Optionally select a worktime reason to use after you complete the Wrapup (if this option is enabled).
3. Click the  button.




## Processing Callbacks from Desktop


The Callback feature provides callers the option to be called back by one of the agents, rather than wait in the queue for their call to be delivered. Callers leave a Callback message and hang up, and still maintain their position in the queue. The message is delivered to the Agent in place of the call.

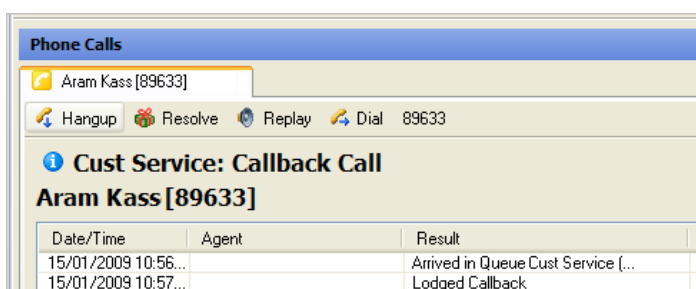
### Responding to a Callback from Desktop

The Callback is delivered to you. The Phone Call screen shows that it is a Callback, and includes the callback's history.

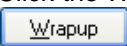
Click the Answer button  Answer.

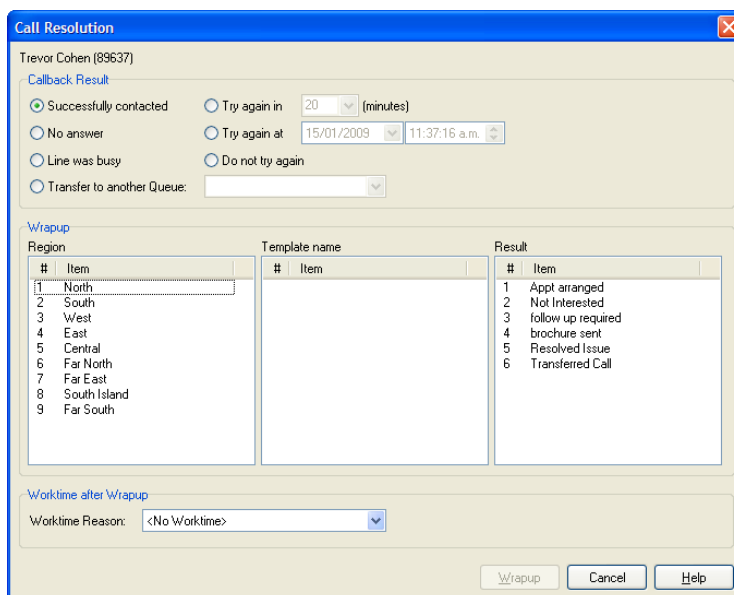
### Answering a Callback

1. The Callback screen displays as you answer a Callback request. Any message left by the caller is automatically played. Click *Replay* to hear the message again.
2. Click *Dial* to Establish the Callback. You can also change the phone number to use in the Call field.
3. Click the  *Resolve* button to provide a callback result.



### Resolving a Callback

1. After clicking *Resolve* you will be asked to resolve the callback with a Callback Result. This enables the system to determine what to do with the callback.
2. Select the appropriate Callback resolution. The call resolution box will automatically activate when you complete the callback.
3. If Wrapup is also required, select the appropriate wrapup details (specific to each site).
4. Click the Wrapup button  to complete.

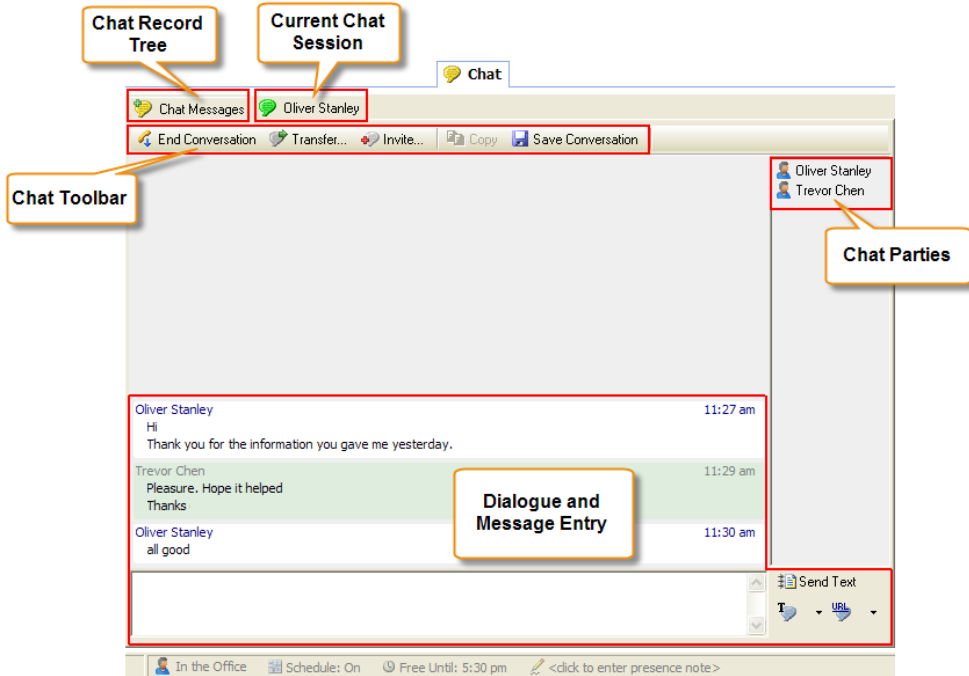


Region	Template name	Result
1 North		1 Appt arranged
2 South		2 Not Interested
3 West		3 follow up required
4 East		4 brochure sent
5 Central		5 Resolved Issue
6 Far North		6 Transferred Call
7 Far East		
8 South Island		
9 Far South		

**Note:** If the agent does not resolve the call correctly, or hangs up without resolving the call, the callback is placed back into the queue and will deliver to the next available agent!

# Desk to Desk Chat



Desk-to-Desk chat is used to have a 'conversation' in real time with other internal users by typing text. Click on the Chat tab in the Phone bar to open the Chat screen.






## Chat Toolbar buttons and Controls

	Click to start a new chat call to either a selected chat User or Chat Queue.
	Click to end the current Chat call.
	Click to Transfer the current chat call to either a selected Chat User or Chat Queue.
	Invite one or more chat users to join the current chat call. Invitees must accept the invite to join.
	Select the chat dialogue and click the Copy button to copy to the clipboard.
	Save a transcript of the chat conversation in a text format to a specified disk directory.
	Click to transmit the typed text. Alternatively simply press the keyboard Enter key.
	Close the current chat pane.
	Add, edit or delete standard chat phrases or commonly used URL links
	Select saved text phrases from the drop-down list. These are sent directly to the other chat parties.
	Select saved URLs from the drop-down list. These are sent as links directly to the other chat parties.
	Push your current Desktop browser URL to the chat recipients.
	Automatically send a series of web page URLs as you navigate using the Desktop web browser. The Trace URL button toggles the feature on/off.
	Pink - Outbound Chat conversation
	Green - Inbound Chat conversation



## Make a Chat Call

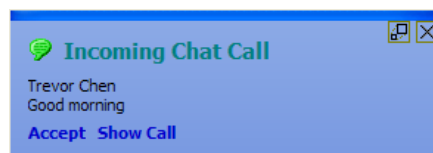
1. Click the  button to start a new chat call.
2. Select either the *Chat User* or *Chat Queue* option and then select the specific entry from the drop-down list.
3. Click the Chat button in the dialog window. A new conversation pane opens.
4. Type in the message in the message text field, then click  or simply press the keyboard *Enter* key to transmit the typed text. An outbound chat call will be shown as waiting in the *Active Calls* pane until the recipient answers the call.

## End a Chat Call


1. Click the  button.
2. Optionally, click the  button to save a transcript of the chat conversation in a text format to a specified disk directory.
3. Click the  button to close the conversation pane.

## Answer a Chat Call


1. When a new chat call pop-up message is displayed:
  - Click *Accept* on the pop-up message to answer the chat call, and then navigate to the *Chat* pane by clicking on the *Chat* tab, or
  - Click *Show Call* on the pop-up message to display the Chat pane, and then click the  button.
2. Type in the reply message in the message text field, then click  or simply press the keyboard *Enter* key to transmit the typed text.



## Transfer a Chat Call

1. Click the  button to transfer the current chat call.
2. Select a chat User or Queue from the drop-down list. Optionally check the *Include current chat conversation* box to give the recipient access to the prior dialogue.
3. Click the *Transfer* button to complete the call transfer.

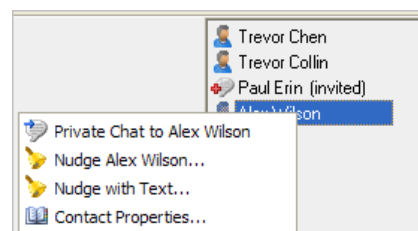
## Invite Additional Chat Participants

1. Click the  button to access the *Invite Participants* screen.
2. Select one or more chat users to join the current chat call. Optionally check the *Include current chat conversation* box to give the invitees access to the prior dialogue.
3. Click the *Invite* button to send the invitations. Invitees must accept the invite to join.

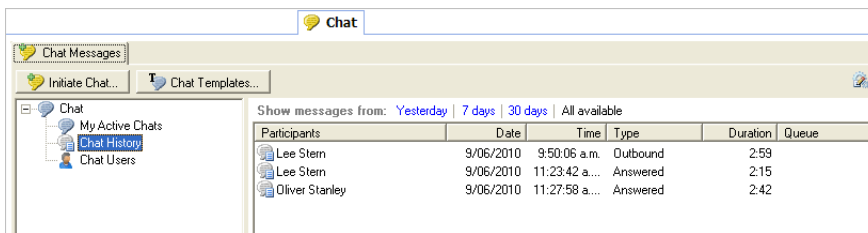
## Private Chat

When there are three or more chat participants you can have a private chat with a selected participant.

1. Right-click on the participant name and select the *Private Chat* option.
2. A new chat window opens to enable the private chat session.



## Chat Messages




Chat Messages provides an organised listing of chat conversations and chat users. Select the required category and then use the right-click menu to access the available functions for the selected chat session or user. Refer to the online help for more details.



## Create and Use Templates

Templates enable you to save and use commonly used phrases and URLs when chatting.

### Create Template

1. Click the  button
2. Choose either the *Phrases* or *Links* tab in the Templates dialog window. Existing entries are displayed and can be edited or deleted.
3. Click Add and enter a suitable label and the associated text or URL
4. Click OK.

### Use Template

1. Open the drop-down list of either  or  and select the required item from the list.
2. The text phrase is automatically sent to the other chat parties. The URL is pushed to the other chat parties.

**Note:** when a URL is received in:

*Desktop* – it is shown as an active link and the built-in Web Browser automatically opens the web page.

*Executive Insight* - it is shown as an active link.

## Additional Chat Functions

Refer to the online help for additional less frequently used functions and configuration settings.


## Web Chat Queue Calls

This function enables a remote user to initiate a chat call with an Agent, via a chat queue, using a web browser.

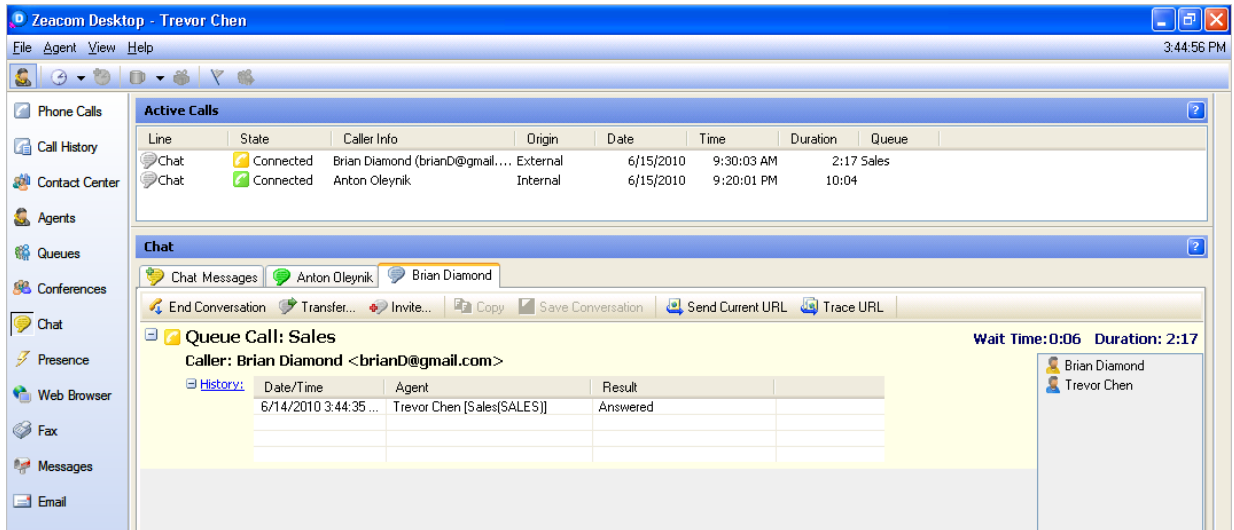
### Logging in to a Chat Queue

When logging in to a queue, ensure that the Chat media option is selected.

### Answering a Web Chat Call

An inbound Web Chat queue call presents in the same way in the Active Calls pane as any other queue call. Chat caller details are available in the Chat pane. Click  in the Chat toolbar to accept the offered call.

**Note:** You can not initiate a chat call to a remote web chat user.



The normal web queue chat functions are the same as Desk-to-Desk chat functions that are described in this guide.

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