Customer Journey Platform Agent Desktop User Guide

Notification

The Broadsoft CC-One solution has been renamed the Cisco Customer Journey Platform. Beginning in August 2018, you will begin to see the Cisco name and company logo, along with the new product name on the software, documentation and packaging. During this transition process, you may see both Broadsoft and Cisco brands and former product names. These products meet the same high standards and quality that both Broadsoft and Cisco are known for in the industry.

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Contents

1 Getting Started

The CJP Agent Desktop provides a single browser-based application enabling agents to interact with customers using voice, chat, or email. Although not all agents may be set up for omni-channel interactions (voice, chat, and email), every agent has access to at least one channel.

Note: Agents handling voice interactions require a telephone in addition to the CJP Agent Desktop Application (ADA).

Topics covered in this chapter:

- Agent Desktop Prerequisites
- Logging in to the Agent Desktop
- Logging out of the Agent Desktop

Agent Desktop Prerequisites

Make sure your workstation is set up as described in the following topics before attempting to log in to the Agent Desktop for the first time.

System Requirements

Following are the minimum system requirements for the CJP Agent Desktop:

- **Memory:** 2 GB overall application RAM, excluding the operating system allocation.
- **Operating System:** Microsoft Windows 7 or Microsoft Windows 8 or Microsoft Windows 10.

In addition, personal firewall settings must be off.

Browser Requirements

The CJP Agent Desktop requires Internet Explorer V10 or higher, Firefox V38 or higher, or Google Chrome V44.0.2403 or higher.

The browser must be set up as follows:

- Browser cache cleared before starting the current release for the first time
- Cookies set to Enabled
- Security level set to Medium
- Show Pictures option selected
- Pop-up blocker disabled
- Javascript enabled

Telephone Requirements

Agents handling voice interactions must have a telephone. To ensure connectivity, call your dial number (DN) from another phone to validate your voice connectivity. The same DN must be entered in the login screen when you log in.

Logging in to the Agent Desktop

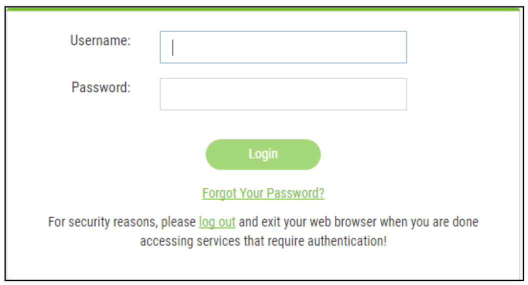
Before logging in:

> Make sure your phone is *not* in a *Do Not Disturb* state, because that will cause the CJP Agent Desktop to go into a *Not Responding* state.

To log in:

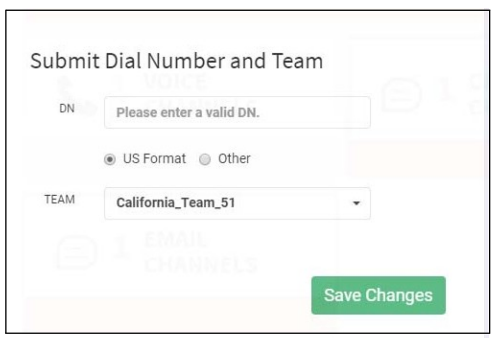
1. Open your Web browser and navigate to the URL provided by your CJP administrator.

   Log-in fields appear.



2. Enter your user name and password, and then click **Login**.

   The Submit Dial Number and Team dialog box appears.



3. Do one or more of the following:

   - If your DN is not preconfigured, enter the dial number of your telephone.
   - Select the **US Format** button if the DN has the following format: dialing prefix + area code + 7-digit number (for example, 1-800-555-1212). Otherwise, select the **Other** button.

     Note:

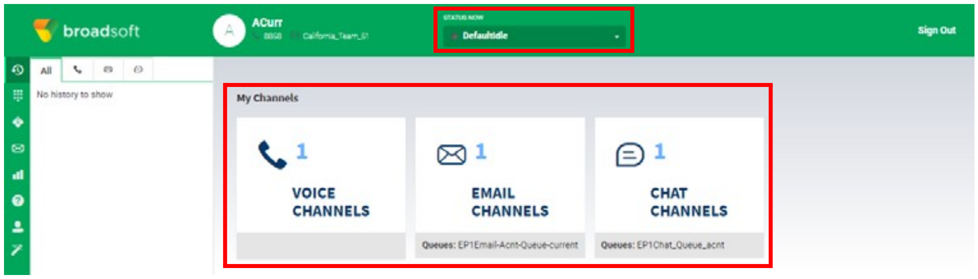
     – The format of the telephone number usually depends on your location.

     – The format setting might not be required at your enterprise.

   - Select a team from the **Team** drop-down list.

4. Click **Save Changes**.

   The Agent Desktop opens and displays your channel allocations as enabled in your CJP agent profile. By default, you are placed in an Idle state when you log in to the Agent Desktop.



5. To make yourself available to accept incoming contacts, select **Available** from the **STATUS NOW** drop-down list (see "About Agent States" on page 13).

   For information on using the Agent Desktop to process voice, email, or chat contacts, see:

   - Handling Voice Contacts
   - Handling Email Contacts
   - Handling Chat Contacts

Note: Before logging out, be sure to see the next topic, "Logging out of the Agent Desktop."

Logging out of the Agent Desktop

Before logging out of the Agent Desktop, note the following:

- Do not close the browser window in which the Agent Desktop is running.
- If you close the Agent Desktop while a call is on hold, the system will automatically take the call off hold.

To log out:

1. If you are not already in an Idle state, select an Idle state from the **STATUS NOW** drop-down list.
2. Click **Sign Out** on the right side of the Agent Desktop title bar.

2 Working in the Agent Desktop

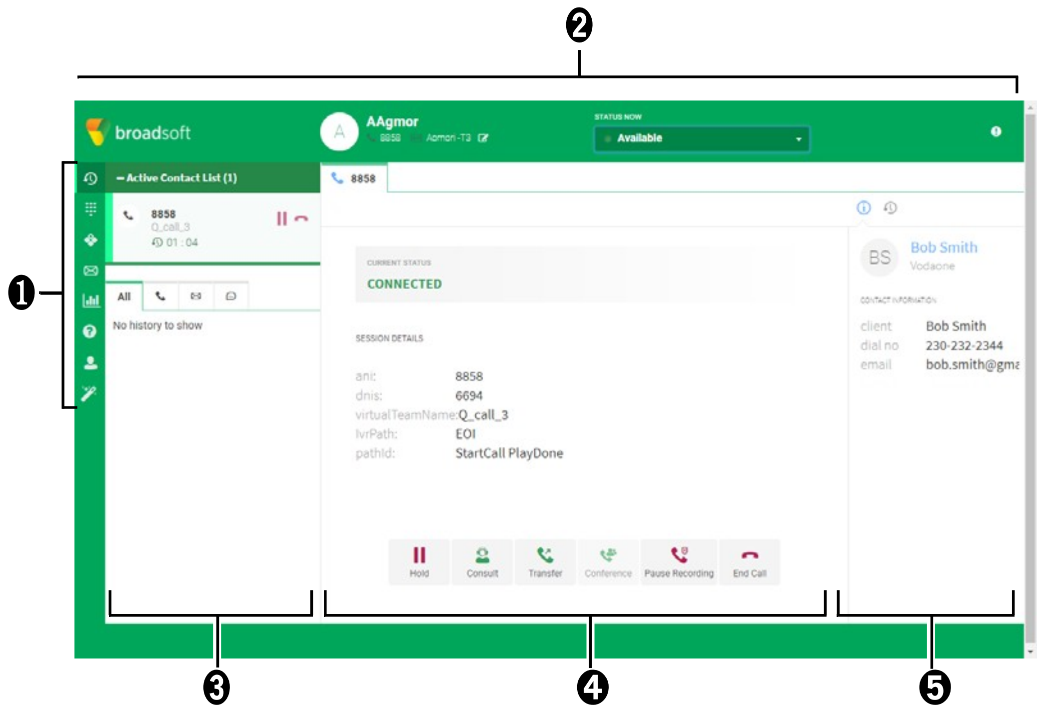
This chapter provides an overview of the three-panel Agent Desktop, a detailed description of agent states to help you work productively in the Agent Desktop, and instructions for performing general tasks regardless of whether you communicate with customers through voice, chat, or email.

Topics covered in this chapter:

- Agent Desktop Overview
- About Agent States
- About the Active Contact List
- Viewing Your Recent Activity
- Viewing Information about the Current Customer
- Viewing the History for the Current Customer
- Entering Wrap Up Information
- Accessing UC-One Contacts

Agent Desktop Overview

The CJP Agent Desktop enables agents to efficiently interact with customers by voice, email, or chat in a single three-panel interface. Depending on how your CJP administrator has configured your agent profile, you may be able to communicate with customers through one, two, or all three channels.



❶ Navigation Bar
❷ Title Bar
❸ Current Interaction Panel
❹ Interaction Workspace Panel
❺ Auxiliary Information Panel

Areas of the Agent Desktop are described in the following topics:

- Navigation Bar
- Title Bar
- Current Interaction Panel
- Interaction Workspace Panel
- Auxiliary Information Panel

Navigation Bar

The left side of the Agent Desktop contains the *navigation bar*, which allows access to various Agent Desktop features outside the current active contact. You can point to the icons on the navigation bar to display the action each button performs.

Depending on how your CJP administrator has configured your agent profile, you may not see all the buttons described below.

Contact History Button	Displays information about the customers you interacted with during the current day. If your profile gives you access to more than one communication channel (for example, voice and email), you can click the tabs in the left panel of the Agent Desktop to display information by channel. Or, you can click **All** to list all contacts for the current day.
Dialpad Button	If your profile is configured for voice communications and allows you to make outdial calls, you can click the Dialpad button to display a keypad for dialing. See “Making an Outbound Call” on page 40.
Resources Button	If your profile is configured for chat or email communications, you can click the Resources button to create content that can be used during chat sessions and in email messages. See “Creating a Custom Resource” on page 57.
Outbound Email Button	If your profile is configured for email communications and outbound email is enabled, you can click the Outbound Email button to open a blank email message in the center panel of the Agent Desktop that you can address and send to a customer outside the contact center. See “Composing an Outbound Email Message” on page 62.
Agent Statistics Button	If your profile is configured for voice communications and statistics reporting is enabled, you can click the Agent Statistics button to display the Agent Personal Statistics tab in the center panel of the Agent Desktop. For information about the statistics available, see Chapter 6, “Viewing Agent Statistics,” beginning on page 73.
Online Help Button	Displays online Help topics in the center panel of the Agent Desktop. Note that you can also access Help by pressing ALT+F1.
UC Contacts Button	If you have a Cisco UC account, you can click the UC Contacts button, enter your UC credentials, and access your UC contacts within the Agent Desktop. See “Accessing UC-One Contacts” on page 23.
Workforce Optimization Button	If your profile provides access to the Workforce Optimization feature, you can click this button to log in and access agent schedules, request schedule changes, and request time off. A Help button in the upper right corner of the Workforce Optimization page provides access to Workforce Optimization Help topics. ?

Title Bar

The top of the Agent Desktop, or *title bar*, displays information about you, such as your name, DN, the name of your team, and your agent state.

The **STATUS NOW** drop-down list lets you change your availability to accept contacts or go into an idle state so no contacts are routed to you. When you log in, you are placed in the Default Idle state. You must select the Available state to receive incoming contacts. If you need to restrict incoming contacts due to your current activities (for example, to attend a meeting or take your lunch break), you can select an Idle state from the **STATUS NOW** drop-down list and no new contacts are routed to you until you select Available once again. Your CJP administrator configures various Idle states based on the requirements of your enterprise.

Current Interaction Panel

When you are logged in and Available, the *current interaction panel* on the left side of the Agent Desktop displays contact cards that have been routed to you. By default, the lower area of the left panel displays a history of all the contacts with whom you have interacted during the current day. Information displayed in the left panel changes when you make selections in the navigation bar.

Interaction Workspace Panel

When you first log in to the Agent Desktop, the *interaction workspace panel* in the center of the Agent Desktop displays your channel allocations as configured in your CJP agent profile. After you set your status to Available and you have answered a call or accepted a chat or email contact, the center panel displays details about the active contact in the left panel. The center panel can also display information based on your selection in the navigation bar. For example, online Help topics are displayed in the center panel of the Agent Desktop, as well as agent statistics (if your profile is configured for voice communications and statistics reporting is enabled).

Auxiliary Information Panel

The *auxiliary information panel* on the right side of the Agent Desktop displays information based on subtabs you select. For example, if you are on a call or chatting with a customer and you select the Information subtab, you see details about the customer with whom you are interacting. This information might be limited to only the customer's dial number (DN) or the email address the customer entered when initiating a chat request or email message. If more information is available about the customer, that information is also displayed.

About Agent States

Agent states are states that you can be in while using the Agent Desktop. There are two categories of agent state:

- Agent availability states determine whether you can receive and accept contacts and apply to all communication channels.
- Agent contact states are the states the system assigns to you as you process contacts. Contact states differ depending on the channel through which you are communicating.

Topics covered in this section:

- Agent Availability States
- Voice Contact States
- Email and Chat Contact States

Agent Availability States

When you log in to the Agent Desktop, the system places you in a default Idle state. In order to be placed in a routing queue so you can accept contacts, you must place yourself in the Available state. If you need to go offline for a meeting, training, or your lunch break, you can place yourself in an Idle state. No contacts are routed to you when you are in an Idle state.

Agent State	Description
Available	You are ready to accept and respond to contacts. After you log in, you must select **Available** in the STATUS NOW drop-down list to receive routed contact requests.
Any Idle state	You are logged in but not ready to accept contact requests. By default, you are placed in an Idle state when the Agent Desktop opens. Your CJP administrator can configure additional Idle states that are appropriate for your enterprise. Therefore, you may see selections such as Lunch Break, Training, or Meeting in the drop down list that are not mentioned in this guide. If you need to go offline during your work day, you can manually select an Idle state. In addition, you can select an Idle state while you are interacting with a customer, and you will be placed in that Idle state when the call or chat session ends or when you send or close the current email message. If you have questions regarding which Idle state to select, consult your supervisor.

To make yourself available to accept incoming calls:

> After logging in to the Agent Desktop, click the **STATUS NOW** drop-down list in the title bar and select **Available**.

To place yourself in an Idle state so no contacts are routed to you:

> While in the Available state, click the **STATUS NOW** drop-down list and select an Idle state.

Voice Contact States

Voice contact states are initiated by the CJP system and change as you process calls. For example, when a voice contact card appears into your Active Contact List, your current status displayed in the center panel of the Agent Desktop changes to **Ringing**. When you answer the call, your current status changes to **Connected**.

Voice contact states differ depending on whether you are communicating with a customer on Line 1 or another person (such as another agent or subject-matter expert) on Line 2.

Line 1 Agent States

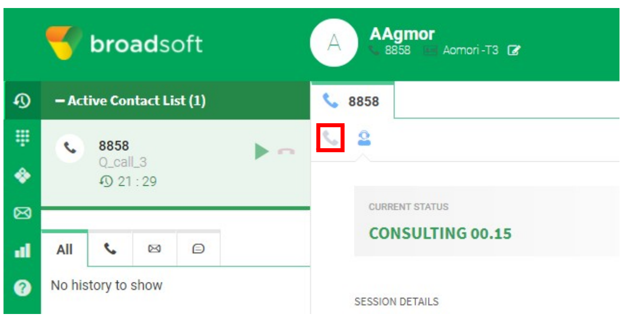
Line 1 Agent states are described in the following table. Note that some states may not be enabled on your system.

Agent State	Description
Ringing	A new voice contact card is in your Active Contact List in the left panel of the Agent Desktop awaiting your acceptance. If you don't accept the call within the time period configured by your CJP administrator, the call returns to the queue and is assigned to the next available agent.
Connected	You have accepted the voice contact card and are connected to a caller. When the connection is made, a timer starts in the contact card indicating how long you have been connected. Information related to the call is displayed in the center panel of the Agent Desktop, and information about the caller is displayed in the right panel.
NotResponding	The phone rang but was not answered within the time period configured by your CJP administrator. The call is returned to the queue. A message appears on your desktop that presents you with the option to either to take the next call or go into an Idle state. Select one of the options.
Call On Hold	You have placed the call on Line 1 on hold.
ConsultReserved	While you were in the Connected state, another person requested a consultation with you.

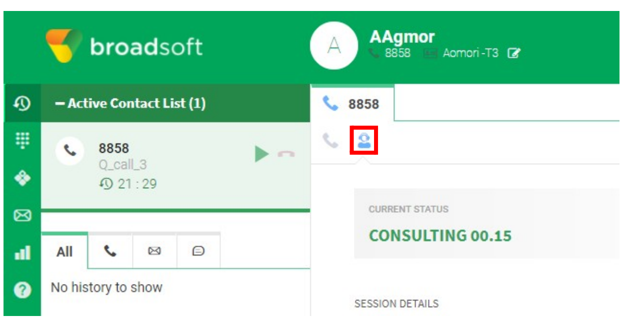
Agent State	Description
Consulting	You are consulting with another person such as another agent at your enterprise. A timer shows the amount of time you have been consulting with the person.
Conferencing	You are conferencing with a customer and an agent.
OutdialReserved	You have initiated an outdial call. Information related to the call is displayed in the center panel.
Wrap Up	The call has ended. You are prompted to enter Wrap Up codes before taking another call. See "Wrapping Up Voice Communications" on page 19. While in the Wrap Up state, you cannot receive a routed or transferred contact card.

Line 2 Agent States

When you are on a conference call or are consulting with another person, subtabs appear in the Line 1 tab. The subtab on the left represents Line 1.



The subtab on the right represents Line 2, which is your *conference and consulting* line. Line 2 enables you to communicate by voice with another person while a customer is on hold on Line 1.



The following agent states can appear in the consult subtab.

Agent State	Description
ConsultReserved	While handling a call, you initiated a consult request. You do not hear ringing when your request is being sent to the other person.
Consulting	You are consulting with another person. A timer shows the amount of time you have been consulting with the person.
Conferencing	You are conferencing with a customer and an agent. A timer shows the amount of time you have been conferencing.

Email and Chat Contact States

Email and chat contact states are initiated by the CJP system and change as you process contacts. For example, when an email contact card appears in your Active Contact List, your status is Alerting in the system. When you accept in the email contact, your status changes to Accept. Email and chat contact states are not displayed in the Agent Desktop.

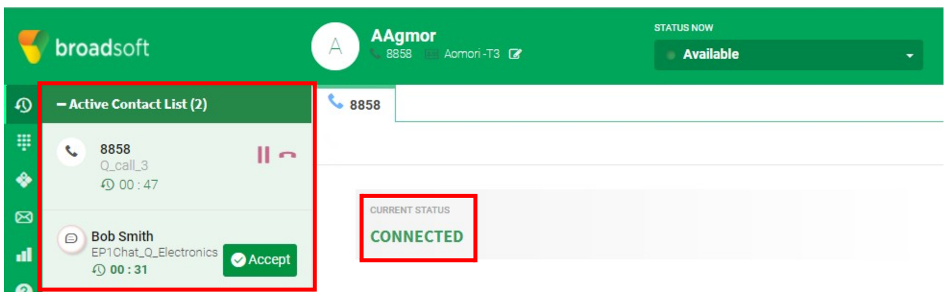
Note: If you do not accept an email or chat contact card within the period of time configured by your CJP administrator, the contact card in the Active Contacts List flashes for a few seconds and then Redirect On No Answer (RONA) occurs. The unaccepted contact card is replaced in the queue and your agent availability state changes from Available to an AUX state (typically named RONA), as configured by your administrator. You must manually select **Available** in the STATUS NOW drop-down list before you can receive incoming contact cards.

Agent State	Description
Alerting	An email or chat contact card is in the contact list in the left panel of the Agent Desktop, but you have not yet clicked the **Accept** button.
Accept	You have clicked the **Accept** button in the email or chat contact card and the contact is assigned to you.
End	You have closed the email message or you or the customer have ended the chat session. You are prompted to confirm that you want to end communication with this customer. After confirming, you are placed in the Wrap Up state.
Wrap Up	The chat session has ended or you have replied to an email contact. You are prompted to enter Wrap Up codes before you can accept a new contact. See “Wrapping Up Email and Chat Communications” on page 20. While in the Wrap Up state, you cannot receive a routed or transferred contact.

About the Active Contact List

When a contact is routed to your queue and you are available, a new contact card appears in your Active Contact List. The contact card contains information about the customer, such as the customer's DN for a voice communication or the customer's name for a chat or email communication. Also included is the CJP queue that routed the contact to you and the elapsed time the customer has been awaiting a response. After you have accepted the contact card, the timer displays the elapsed time of your interaction with that customer.

EXAMPLE: The Active Contacts List showing a voice contact card in the Connected state and chat contact card in the Alert state.

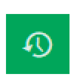


Viewing Your Recent Activity

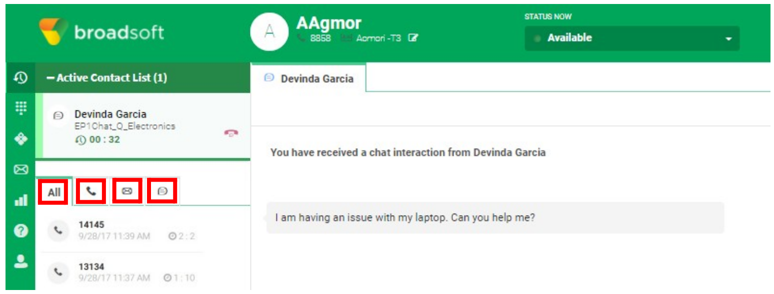
The Agent Desktop displays your contact history for the current day in the left panel by default. When you log in, your history shows no entries, but as soon as you begin interacting with customers, the History subtabs enabled in your profile begin populating.

To display your recent activity for the current log-in session:

1. Click the **History** button in the navigation bar on the left side of the Agent Desktop.



2. Click the History subtabs to display activity by communication channel.

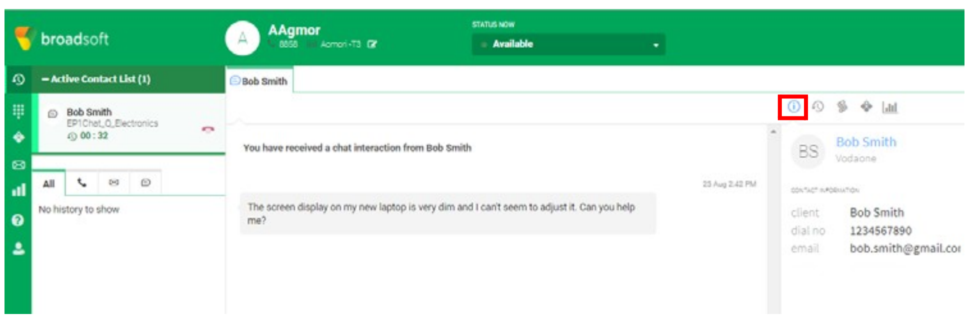


Viewing Information about the Current Customer

When you answer a call or accept a contact card, information about the current customer appears in the right panel of the Agent Desktop. The information displayed differs depending on which channel you are using for communication. If the customer is established with your enterprise, you may be able to view previous communications as described in the next section.

To view information about the current customer:

> Click the **Information** subtab in the right panel of the Agent Desktop.

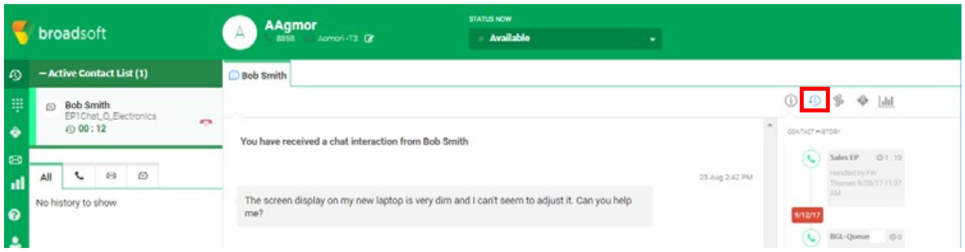


Viewing the History for the Current Customer

When you are interacting with a customer, information about the customer appears in the right panel of the Agent Desktop. If this customer has interacted with the contact center in the past, information from previous interactions might be available from the CJP database.

To view the history for the current customer:

> Click the **History** subtab in the right panel of the Agent Desktop.



Entering Wrap Up Information

After you conclude an interaction with a customer, the Agent Desktop prompts you to enter information regarding your experience assisting the customer. This information is used by your enterprise in measuring the effectiveness and success of the contact center.

The Wrap Up information requested differs between channels. Input fields available are described in the following sections:

- Wrapping Up Voice Communications
- Wrapping Up Email and Chat Communications

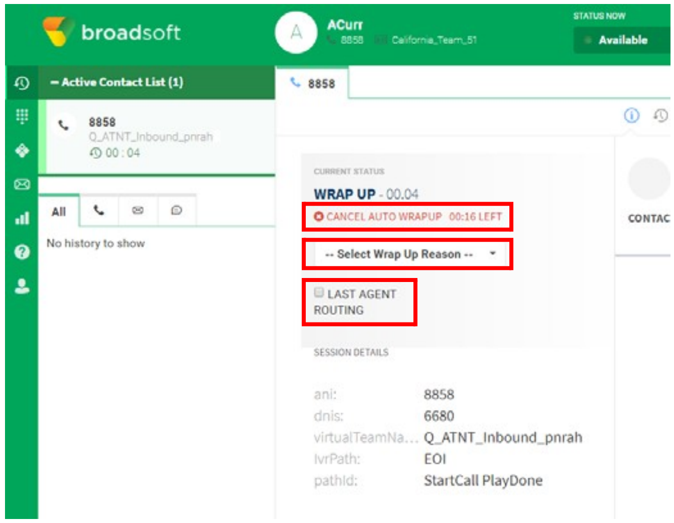
Wrapping Up Voice Communications

After you disconnect a call, the voice Wrap Up page appears in the center panel of the Agent Desktop.

Note: If your system is configured for Auto Wrap Up and you do not complete and submit Wrap Up codes before the Auto Wrap Up timer expires, the Agent Desktop submits a default Wrap Up code for you.

To submit Wrap Up codes regarding your interaction with a customer:

> Specify the appropriate settings and Wrap Up codes.



Your enterprise may have specific requirements for Wrap Up codes. Check with your supervisor for more information.

CANCEL AUTO WRAPUP	If your system is configured to allow you to extend the Auto Wrap Up time, click **CANCEL AUTO WRAPUP** to prevent the Agent Desktop from submitting the default Wrap Up code. Stopping automatic Wrap Up is helpful when you need to enter a specific code but are busy with other tasks when the Auto Wrap Up timer starts.
Select Wrap Up Reason	Select a Wrap Up code from the drop-down list. When you select a wrap up reason, the voice wrap up page closes.
LAST AGENT ROUTING	Select this checkbox to force a subsequent call from the same telephone number to be routed to you, even if another agent on your team has been available longer when the call arrives. This feature is useful when you are expecting a return call from a specific customer.

Wrapping Up Email and Chat Communications

At the conclusion of a contact interaction, you are prompted to enter Wrap Up codes regarding the status and tone of your communication with the customer and any closure details, or set a reminder if further follow-up is required.

Your enterprise may have specific requirements for Wrap Up codes. Check with your supervisor for more information.

To submit Wrap Up codes describing your interaction with a customer:

> Complete the appropriate fields in the Wrap Up page, then click **Wrap Up**.

Status of the Conversation	Select a value (**Pending**, **Resolved**, **Requested Info**, or **No Action Required**) that summarizes the status of the conversation when the interaction concluded.
Communication	Slide the controls to reflect the disposition of the customer during this interaction.
Select Closure Details	Select a Wrap Up code from the drop-down list. You can enter more specific notes about the interaction, if appropriate.
Follow Up Reminder	Check the box if you want the Agent Desktop to send you a reminder regarding this customer interaction, then select the date and time you would like the reminder to be sent. When the date and time you entered arrives, a *Follow Up Work Item contact card* appears in the Active Contact List in the left panel of the Agent Desktop (see the next section).
Follow Up Comments	Enter notes that you want included in your follow-up contact card.

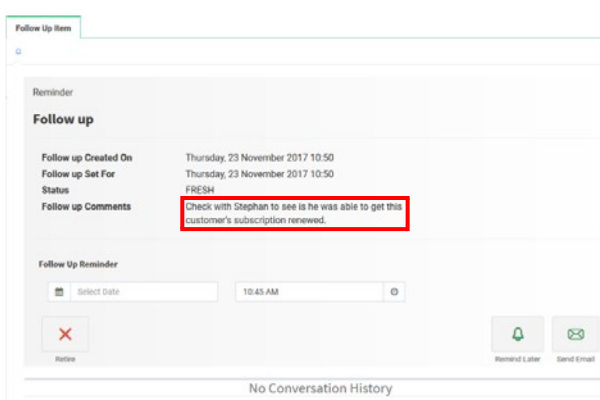
Accessing Email and Chat Follow Up Reminders

To access follow up reminders you scheduled at an earlier point in time:

1. When a **Follow Up Work Item** contact card appears in the Active Contacts List, click **Accept**.

The Follow Up Contact tab appears in the center panel of the Agent Desktop.

2. Review the follow up comments regarding a contact you entered at an earlier point in time.



3. Do one of the following:

   - Click the **Retire** button to close the reminder permanently.

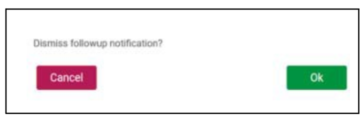
     - OR -

   - Enter the date and time that you want to be reminded about this contact card again, and then click the **Remind Later** button.

     - OR -

   - Click the **Send Email** button to open a blank email message addressed to the customer who initiated the original contact card.
     - If the original contact card was a chat conversation, you are prompted to select an outbound email queue through which the email message will be sent to the customer.
     - If the original contact card was an email message, CJP uses the original outbound email queue so it is not necessary to re-specify the outbound queue.

   Next the Agent Desktop prompts you to verify whether you want to discard or retain information captured in the follow up reminder.

   - Click **OK** to email the customer and discard the follow up reminder. The original email contact card opens for you to respond. For information about using the Agent Desktop to send an email message, see "Sending a Standard Reply" on page 50.

     - OR -

   - Click **Cancel** to return to the follow up reminder. You can click **Retire** to close the follow up reminder permanently, or you can create a new reminder that will be delivered to you at a later date or time.

   Tip: When you use a follow up reminder to send an email message to a customer, the email message is captured in the customer's contact history (see "Viewing the History for the Current Customer" on page 18).

Accessing UC-One Contacts

If your enterprise uses Cisco UC-One, you can communicate with your UC contacts within the Agent Desktop. Communicating through UC-One is useful when you want to consult with someone who does not have access to the Agent Desktop while you are interacting with a customer.

Chatting with UC-One Contacts

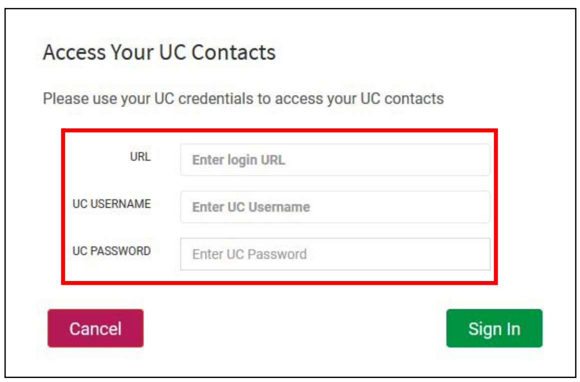
To chat with a UC-One contact within the Agent Desktop:

1. Log in to the Agent Desktop and click the **UC-One** button in the navigation bar on the left side of the Agent Desktop.

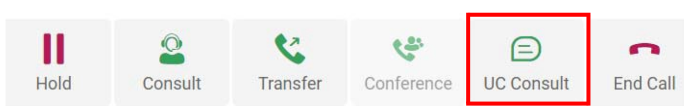
   

2. In the left panel of the Agent Desktop, click **Sign in to UC**.

3. Using your UC credentials, complete the **URL**, **UC USERNAME**, and **UC PASSWORD** fields, and then click **Sign In**.

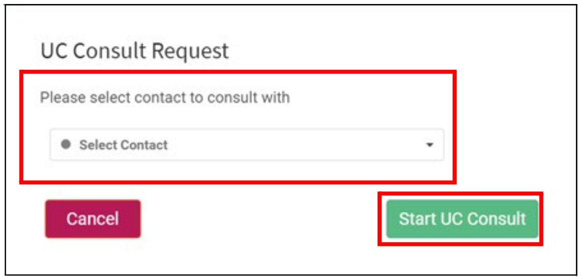
   A list of your UC contacts appears in the left panel of the Agent Desktop. If you are handling a current contact, the **UC Consult** button appears in the center panel of the Agent Desktop.

4. Click the **UC Consult** button.

   Note: The Agent Desktop supports communication with only one UC-One contact at a time.

5. In the UC Consult Request dialog box, select a UC contact from the drop-down list and click **Start UC Consult**.



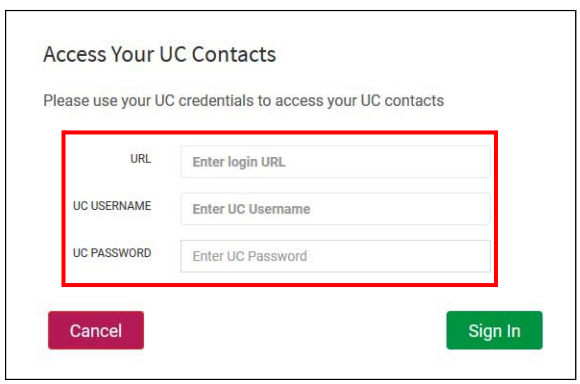
A subtab opens in the center panel of the Agent Desktop where you can chat with your UC contact.

Consulting UC-One Contacts by Phone

To call a UC-One contact by phone from within the Agent Desktop:

1. Log in to the Agent Desktop and click the **UC-One** button in the navigation bar on the left side of the Agent Desktop.

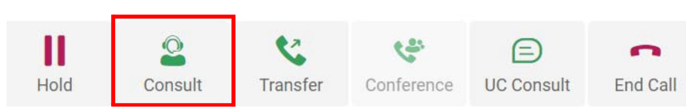
2. In the left panel of the Agent Desktop, click **Sign in to UC**.
3. Using your UC credentials, complete the **URL**, **UC USERNAME**, and **UC PASSWORD** fields, and then click **Sign In**.



A list of your UC contacts appears in the left panel of the Agent Desktop.

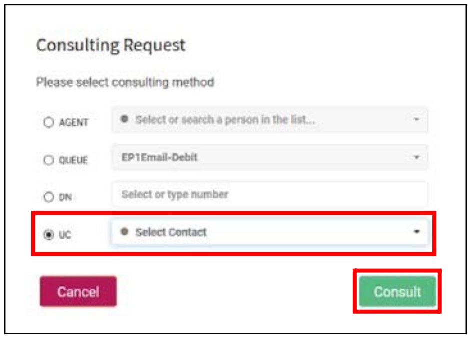
Note: The Agent Desktop supports communication with one UC-One contact at a time.

4. Click the **Consult** button in the center panel of the Agent Desktop.

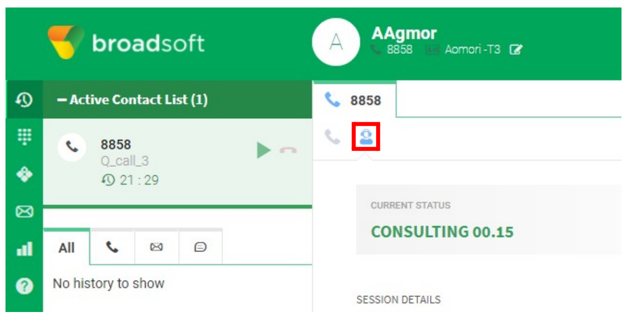


When you are logged in to UC-One within the Agent Desktop, the Consulting Request dialog box displays an option for you to select a UC contact.

5. In the Consulting Request dialog box, select the **UC** button, select a UC contact from the list, and click **Consult**.



A second line subtab opens in the center panel of the Agent Desktop enabling you to speak with your UC contact.



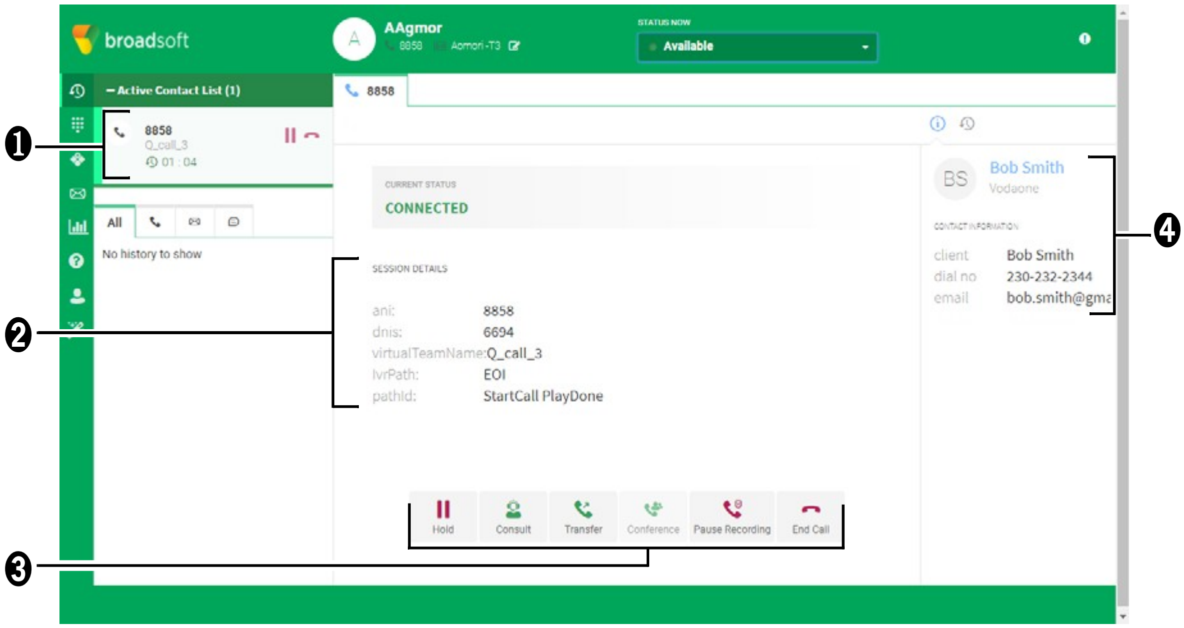
3 Handling Voice Contacts

This chapter describes how to use the features of the CJP Agent Desktop when responding to contacts by phone.

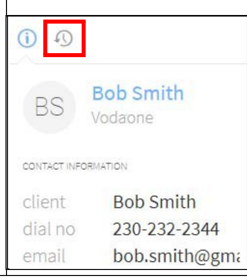
Topics covered in this chapter:

About the Voice Channel

If your CJP administrator has provided you access to the CJP voice channel, you can respond to calls placed to the contact center. The following example shows a connected call. You can point to icons on the Agent Desktop to display icon names.



❶	Voice Contact Card	When a call arrives in your queue, a voice contact card appears in the Active Contacts List in the left panel of the Agent Desktop. The contact card remains displayed in the left panel while you are handling the call.
❷	Call Information	The middle panel of the Agent Desktop displays a list of call-associated data elements related to the current call—for example, the number the caller dialed from or the number the caller dialed to reach you (such as a toll-free number). When an incoming call is connected, this panel can also display one or more editable fields—for example, a case number or reason code (see “Entering Call-Associated Data” on page 32).

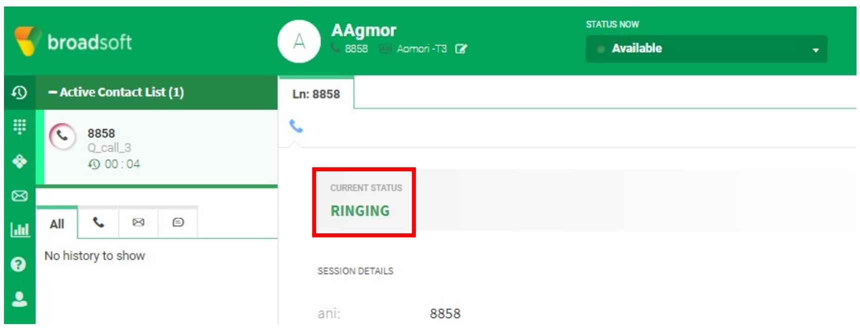
3	Call Control Buttons	The buttons at the bottom of the center panel enable you to perform the following actions when you are connected to a call: Put the Line 1 call on hold. Send a consult request to a target you specify. Transfer the call to a target you specify. Establish a conference call with the caller and the person with whom you are consulting. Take the Line 1 call off hold; if you are consulting with another person on a second line, clicking this button puts the second line call on hold. **Note:** To receive an inbound consult while connected to a call, you must use the second line key or flash function on your agent phone to accept the inbound consult and to toggle between the connected caller on Line 1 and the inbound agent consult on the second line of the Agent Desktop. End the call on Line 1. If you are using a handset or headset, you must hang up the physical phone before you can receive the next call. The following optional buttons may also be available during a call: After sending a consult request, click this button to cancel the request or disconnect a consult call. If you are set up to use the Privacy Shield feature, the following buttons are also available during a call: Click to turn on the privacy shield and pause recording the call. After turning on the privacy shield, the button changes as shown here. Click the button to turn off the privacy shield and continue recording the call.
4	Caller Information	Displays information about the caller, if available. You can display a history of previous contacts with the caller (if available) by clicking the **History** tab in the right panel of the Agent Desktop. 

Answering a Call

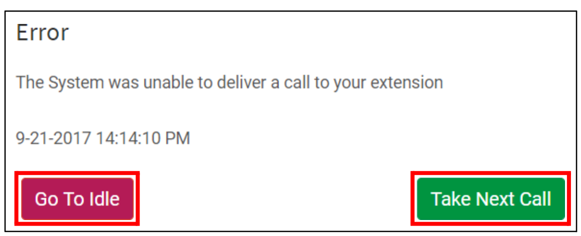
If your profile settings allow you to communicate with customers by phone, voice contact cards appear in the Active Contact List in the left panel of the Agent Desktop when calls are routed to you.

The contact card displays the contact's telephone number, the queue that routed the voice contact to you, and a timer indicating how long the contact has been assigned to you.

In the center panel, the status of the call is displayed as **RINGING**.



Note: If you are unable to answer the call within the time period configured by your CJP administrator, the call is returned to the queue and an alert appears asking if you want to take the next call or be placed in an Idle state.



To answer a call:

1. When a voice contact card appears in your **Active Contact List** in the left panel of the Agent Desktop, use your physical phone to answer the incoming call.

   In the center panel of the Agent Desktop, the status of the call changes to **CONNECTED**.

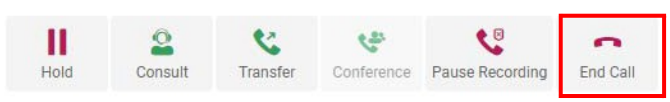
2. While you are handling a call, you can perform the following tasks:
   - “Turning off Recording During a Call” on page 32
   - “Entering Call-Associated Data” on page 32
   - “Putting a Call on Hold” on page 33
   - “Transferring a Call” on page 33
   - “Consulting with Another Person During a Call” on page 36
   - “Creating a Conference Call” on page 39
   - “Making an Outbound Call” on page 40
   - “Requesting Help from a Supervisor During a Call” on page 39
3. To disconnect at the conclusion of a call, see “Disconnecting a Call” on page 31.
4. After you terminate a call, your enterprise may require that you enterWrap Up codes such as status of the call when the call ended. See “Wrapping Up Voice Communications” on page 19.

   Note: If you need to make yourself unavailable at the conclusion of a call (for example, you need to go on your lunch break), you can select an Idle state from the STATUS NOW drop-down list in the title bar during a call or while you are in the Wrap Up state. When you leave the Wrap Up state, you are placed in the Idle state you selected and no contact cards are routed to you until you select **Available** in the STATUS NOW drop-down list once again (see “Agent Availability States” on page 13).

Disconnecting a Call

To disconnect a call on Line 1:

> Click the **End Call** button at the bottom of the center panel of the Agent Desktop.



The call terminates and the Wrap Up page appears in the center panel of the Agent Desktop (see “Wrapping Up Voice Communications” on page 19).

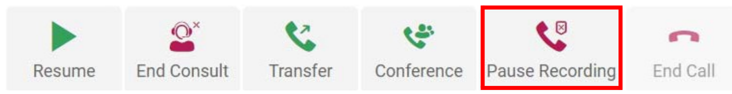
Note: If you are using a handset or headset, you must hang up the physical phone before you can receive the next call.

Turning off Recording During a Call

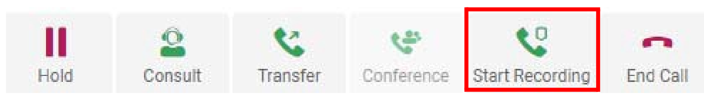
If your enterprise has set up the Privacy Shield feature, you can block the recording of sensitive information during a call, such as a credit card number. Your supervisor will instruct you regarding when to pause recording.

To turn recording off and on during a call:

> While in the Connected state, click the **Pause Recording** button in the center panel of the Agent Desktop to turn on the Privacy Shield feature.



The Privacy Shield remains active and recording stops until the Privacy Shield time period specified by your CJP administrator has elapsed. Notice that when you pause recording, the button changes to **Start Recording**, which you can click at any time during the call to turn off the Privacy Shield and resume recording.



Entering Call-Associated Data

If your enterprise uses call-associated data (CAD) variables to collect data entered by agents, one or more editable fields are available in the center panel of the Agent Desktop when a call is connected.

To enter call-associated data:

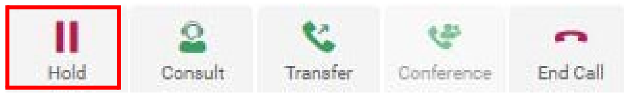
> While in the Connected state, click an editable field and enter the appropriate values. To change a value, select the value and type over it. Your supervisor will instruct you regarding which values to enter.

The values you enter are saved in the CJP database after you complete Wrap Up information for the call. If you transfer the call to another agent or queue and both you and the other agent enter or edit CAD values, only the values entered by the last Wrap Up entry are saved in the database.

Putting a Call on Hold

To put a call on hold:

> While in the Connected state, click the **Hold** button in the center panel of the Agent Desktop.

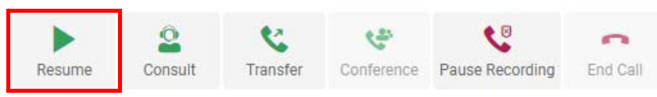


If you are consulting with another person on a second line, clicking the **Hold** button takes the second line call off hold.

Note: When you initiate a consult request, the connected caller is automatically put on hold. You can put the consulted person on hold by taking the caller off hold; both calls cannot be on hold simultaneously.

To take a call off hold:

> Click the **Resume** button.



If you are connected to both a caller and a person with whom you are consulting on a second line, the consulted person is automatically put on hold.

Note: In the case of an inbound consult, you must use the second line key or flash function on your agent phone to toggle between the caller and the inbound consult call from the other agent.

Transferring a Call

Topics covered in this section:

- Transferring a Call to a Specific Agent
- Transferring a Call to a Different Queue
- Transferring a Call to a Specific Number

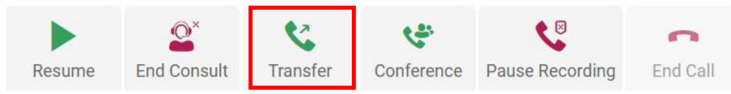
Transferring a Call to a Specific Agent

Before transferring a call to a specific agent, keep the following in mind:

- You cannot transfer a call to an agent who is in the Wrap Up state.
- To receive a blind transfer, the target agent must be in the Available state.
- To receive a consult-transfer, the target agent must be in either the Available or an Idle state when you initiate the consult request.

To transfer a call to a specific agent:

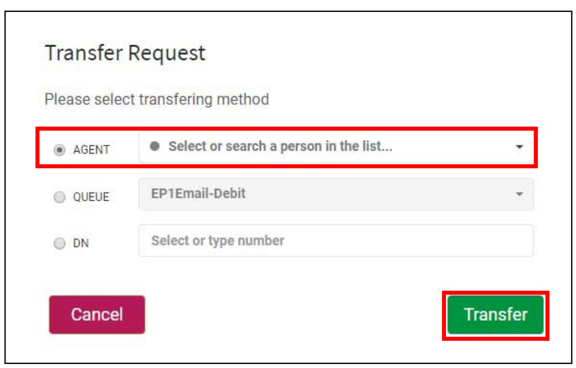
1. While in the Connected state, click the **Transfer** button in the center panel of the Agent Desktop.



2. In the Transfer Request dialog box, select the **Agent** button and select an agent from the drop-down list.

3. Do one of the following:

   - To transfer the call immediately (blind transfer), click **Transfer**.
   - To announce the call before transferring it, click the **Consult** button, wait for an answer, announce the call, and then click **Transfer**.



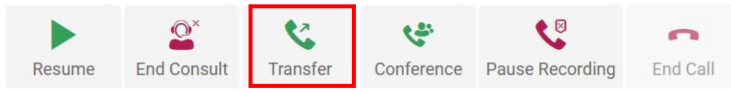
The call is transferred to the selected agent and you are placed in the Wrap Up state.

If the agent is unavailable, an error message informs you that the consult or transfer failed. Try another agent or take the caller off hold (see "Putting a Call on Hold" on page 33).

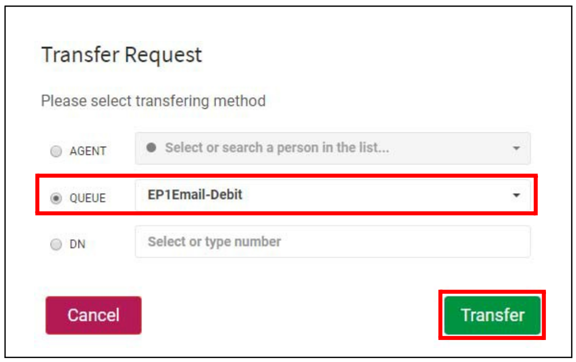
Transferring a Call to a Different Queue

To transfer a call to a different queue:

1. While in the Connected state, click the **Transfer** button in the center panel of the Agent Desktop.



2. In the Transfer Request dialog box, select the **Queue** button, select a queue from the drop-down list, and then click **Transfer**.



The call is queued and you are placed in the Wrap Up state or the Available state, depending on how your system is configured.

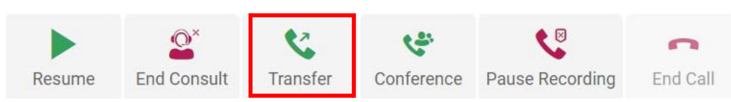
Note: If a queue is deleted from your system while you are on a call, it may still be displayed in the drop-down list. To refresh the list, select a different option in the dialog box (such as the **Agent** button), and then select the **Queue** button again.

Transferring a Call to a Specific Number

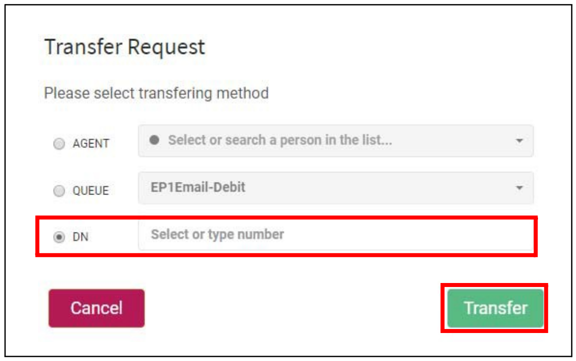
You can transfer a call to a valid phone number that is accessible by your system.

To transfer a call to a specific number:

1. While in the Connected state, click the **Transfer** button in the center panel of the Agent Desktop.



2. In the Transfer Request dialog box, select the **DN** button, enter a valid phone number in the **DN** field or select a speed dial entry from the **DN** drop-down list, and then click **Transfer**.



Note: Names that appear in the DN drop-down list are sourced from your enterprise address book, so people listed might not be logged in to the Agent Desktop.

The call is transferred to the number you entered and you are placed in the Wrap up or Available state, depending on how your system is configured.

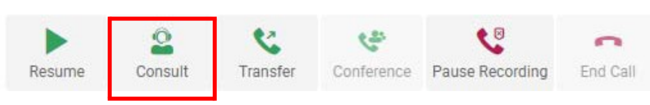
If you transfer a call to an invalid number, the call is transferred to an overflow number, if one exists.

Consulting with Another Person During a Call

You can consult with another Agent Desktop user while you are on the phone with a customer. You can also speak over the phone or chat with one of your UC-One contacts from within the Agent Desktop. For more information, see “Accessing UC-One Contacts” on page 23.

To consult with another person:

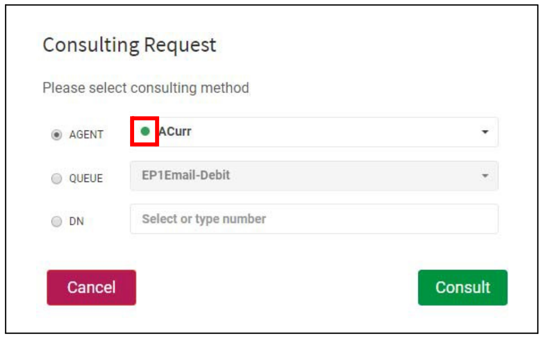
1. While in the Connected state, click the **Consult** button in the center panel of the Agent Desktop.



2. Do one of the following:

   - Select the **Agent** button, and then select a name from the drop-downlist. Only agents currently logged in appear in the list.

The color of the status indicator to the left of the agent's name indicates the agent's current state.



Green	Available
Blue	Connected (on a call)
Gray	Idle

- OR -

- Select the **Queue** button and select a queue from the drop-down list.

  If the Queue option is not available for your enterprise, you cannot select the green **Consult** button in the Request Consult dialog box.

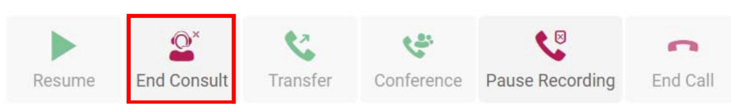
  - OR -

- Select the **DN** button and select a name from the DN drop-down list or enter a valid phone number (if ad-hoc dialing is enabled in your agent profile).

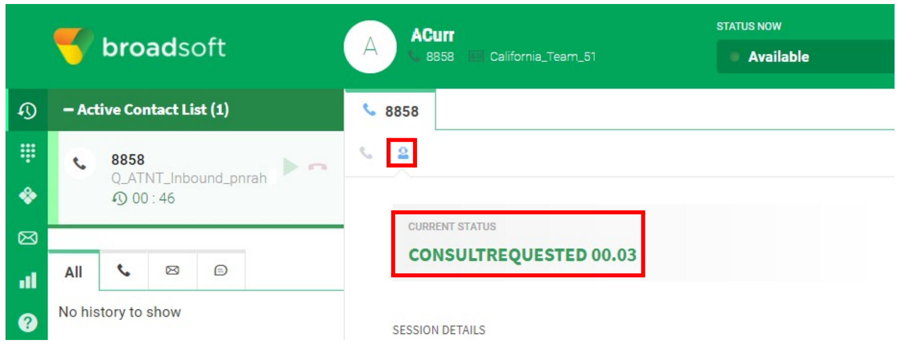
  Names that appear in the DN drop-down list are sourced from the address book, so agents listed might not be logged in to the Agent Desktop.

3. Click the **Consult** button.

The caller is put on hold, your consult request is sent to the specified target, and the button in the center panel of the Agent Desktop changes to **End Consult**.



You do not hear ringing, but the consult subtab appears and your status changes to Consult Requested.



If you are consulting to a queue and a destination agent is available, a message asks if you want to proceed. You must click **Consult** within a predetermined time interval or the consultation request will be cancelled.

4. If the specified target does not answer or the consultation fails, either click the **Consult** button in the center panel of the Agent Desktop again and specify a different target, or take the caller off hold by clicking the **Resume** button.

While you are consulting with another person, you can do the following:

- Click the **Transfer** button to transfer the call to the consulted party. If the consulted party is another agent, the agent must have been in the Available or Idle state when you initiated the consultation. You cannot transfer a call to an agent in the Wrap Up state.
- Click the **Resume** button to put the consulted party on hold and take the caller off hold.
- Click the **Conference** button to establish a three-way conference with yourself, the consulted party, and the caller. If the consulted party is an agent, the agent must have been in the Available or an Idle state when you initiated the consultation.

If your consult request reaches the specified target's voice mail, you may want to release the consulting line while still keeping the caller on Line 1 connected. To do so:

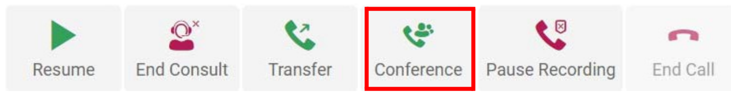
> Either click the **End Consult** button or do the following:

1. Hang up the physical phone while the caller is on hold and the consulted party is the active line. This drops the consulted party and leaves the caller on hold.
2. Take the caller off hold; the system will reestablish audio and call you back.

Creating a Conference Call

To create a three-way conference call with a customer and another agent:

> While you are consulting with another agent (see “Consulting with Another Person During a Call” on page 36), click the **Conference** button in the center panel of the Agent Desktop.



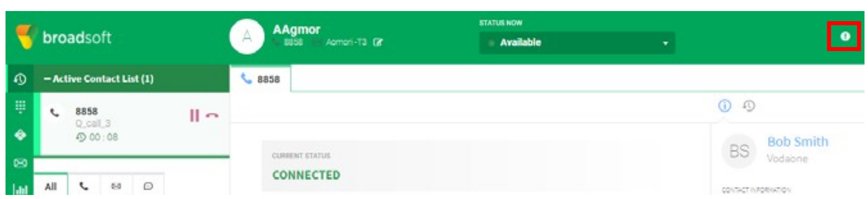
The customer on Line 1 is taken off hold and you, the customer, and the other agent can communicate with each other.

Requesting Help from a Supervisor During a Call

If the Alert Supervisor button is displayed on the right side of the Agent Desktop title bar, you can use it during a call to send a message to all logged-in supervisors. A supervisor who receives your message can click the message to monitor the call.

To request supervisory help during a call:

1. Click the **Alert Supervisor** button.



2. In the Alert Supervisor dialog box that appears, enter a message and then click **Send Alert**. You can enter a maximum of 250 characters.

   A message appears informing you that your alert has been sent.

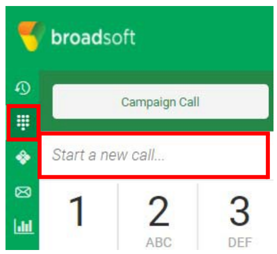
3. Click **OK** to dismiss the message.

Making an Outbound Call

If your profile is configured for outdial, you can make an outbound call from the Agent Desktop. The format of the phone number you can dial is determined by settings in your agent profile. For example, you might be restricted to entering phone numbers of a specific length or beginning with specific area codes.

To make an outbound call:

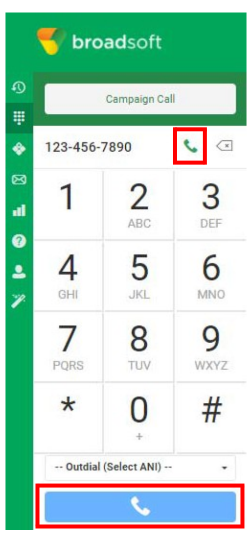
1. While in an Idle state, click the **Dialpad** button in the navigation bar on the left side of the Agent Desktop, and then click **Start a new call**.



2. Do one of the following:
   - Select a number from the address book list that appears.

     - OR -

   - If your profile is configured to allow you to dial a number, click buttons on the dialpad to enter a number.
3. If the **Outdial (Select ANI)** drop-down list is available below the dialpad, you can select a number to be sent as your caller ID before you place the call.
4. Click the green **Place Call** button at the top of the dialpad or the blue **Place Call** button at the bottom of the dialpad.

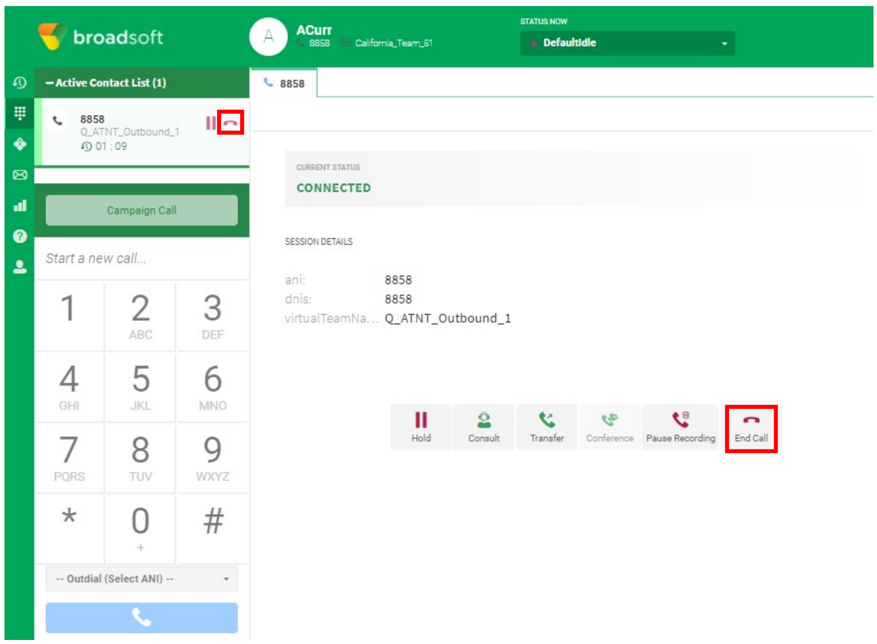


Your call request is sent to the phone number you specified, your Current Status changes to **OUTDIALRESERVED,** and an outbound voice contact card appears in the Active Contact List in the left panel of the Agent Desktop.

5. When your physical phone rings, pick it up and wait for the called party to answer. Or, to cancel the call before the party answers, click the **End Call** button above the dialpad in the Agent Desktop (see step 6).

   When the party answers, you see **CONNECTED** in the center panel of the Agent Desktop.

6. To terminate the call when finished, hang up the physical phone or click the **End Call** button above the dialpad or in the center panel of the Agent Desktop.



Participating in Outbound Calling Campaigns

Depending on how voice campaigns are set up at your enterprise, you will either initiate outdial campaign calls yourself or CJP will initiate outdial calls for you.

- In a *preview call campaign*, you request an outdial contact card from CJP when you are in an Idle state. When you accept the contact card, CJP places the outbound call. If the contact center has communicated previously with the person you are calling, a history of those calls appears in the right panel of the AgentDesktop.
- In a *progressive call campaign*, anytime you are in the Available state, CJP can push an outdial call to you. If the contact center has communicated previously with the person you are calling, a history of those calls appears in the right panel of the Agent Desktop.

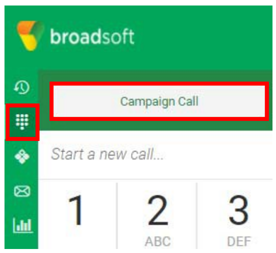
Topics covered in this section:

- Participating in Preview Call Campaigns
- Participating in Progressive Call Campaigns

Participating in Preview Call Campaigns

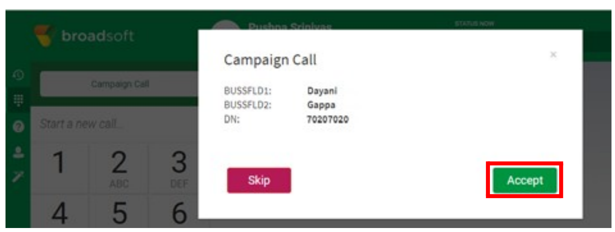
To initiate an outdial call during a preview call campaign:

1. While in an Idle state, click the **Dialpad** button in the navigation bar on the left side of the Agent Desktop, and then click the **Campaign Call** button.

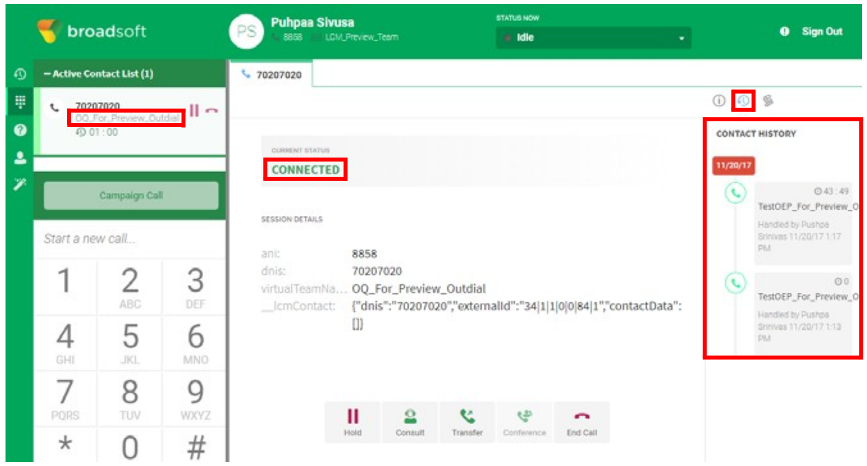


A dialog box appears prompting you to accept or skip placing the outdial call.

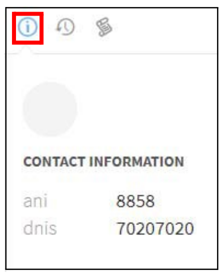
2. Click **Accept**.



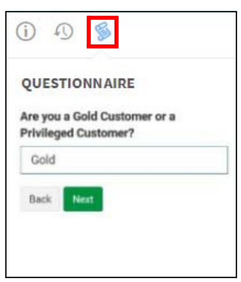
An outdial contact card appears in the Active Contacts List and your phone rings. When you answer your phone, the outbound call to the customer rings. If the customer answers the call, the call connects. If available, a list of previous calls with this customer appears in the **Contact History** subtab in the right panel of the Agent Desktop.



3. You can click the **Contact Information** subtab in the right panel of the Agent Desktop to display the ANI and DNIS for the person called.

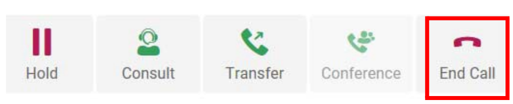


4. If your supervisor has provided you with a script to guide you through the outbound campaign call, you can click the **Questionnaire** subtab to display the script.



5. Process the call using the Call Control buttons at the bottom of the center panel of the Agent Desktop (see "About the Voice Channel" on page 28).

6. When finished, click the **End Call** button.



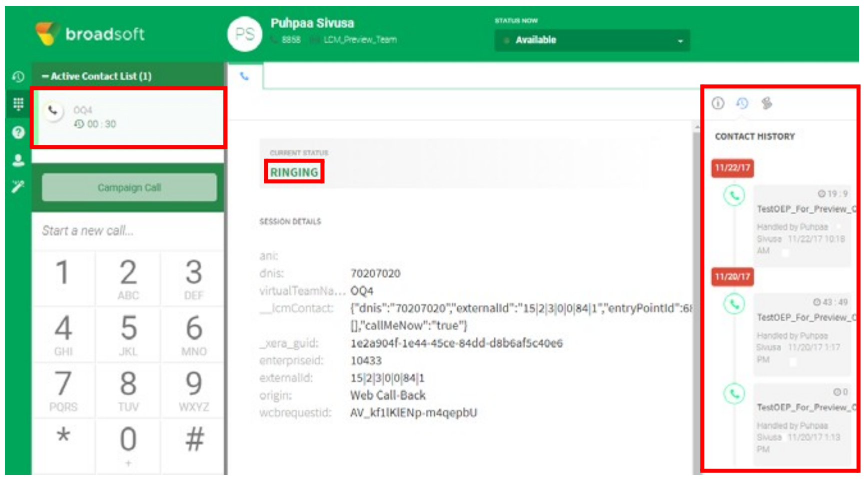
The call terminates and the Wrap Up page appears in the center panel of the Agent Desktop (see "Wrapping Up Voice Communications" on page 19).

Note: If you are using a handset or headset, you must hang up the physical phone before you can receive the next call.

Participating in Progressive Call Campaigns

To connect an outdial call during a progressive call campaign:

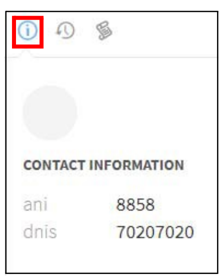
1. When you are in the Available state, CJP can assigning a progressive campaign contact card to you. The contact card appears in your Active Contact List and the status of the call is **Ringing**. If the contact center has communicated previously with the person you are calling, a record of those calls appears the **Contact History** subtab in the right panel of the Agent Desktop.



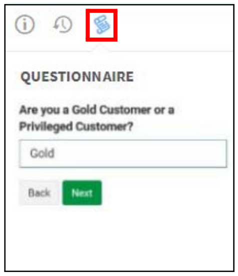
2. Using your phone, answer the call.

   The call connects.

3. You can click the **Contact Information** subtab in the right panel of the Agent Desktop to display the ANI and DNIS for the person called.

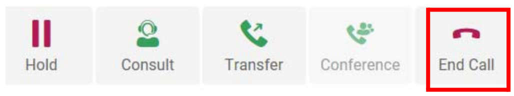


4. If your supervisor has provided you with a script to guide you through the outbound campaign call, you can click the **Questionnaire** subtab to display the script.



5. Process the call using the Call Control buttons at the bottom of the center panel of the Agent Desktop (see "About the Voice Channel" on page 28).

6. When finished, click the **End Call** button.



The call terminates and the Wrap Up page appears in the center panel of the Agent Desktop (see "Wrapping Up Voice Communications" on page 19).

Note: If you are using a handset or headset, you must hang up the physical phone before you can receive the next call.

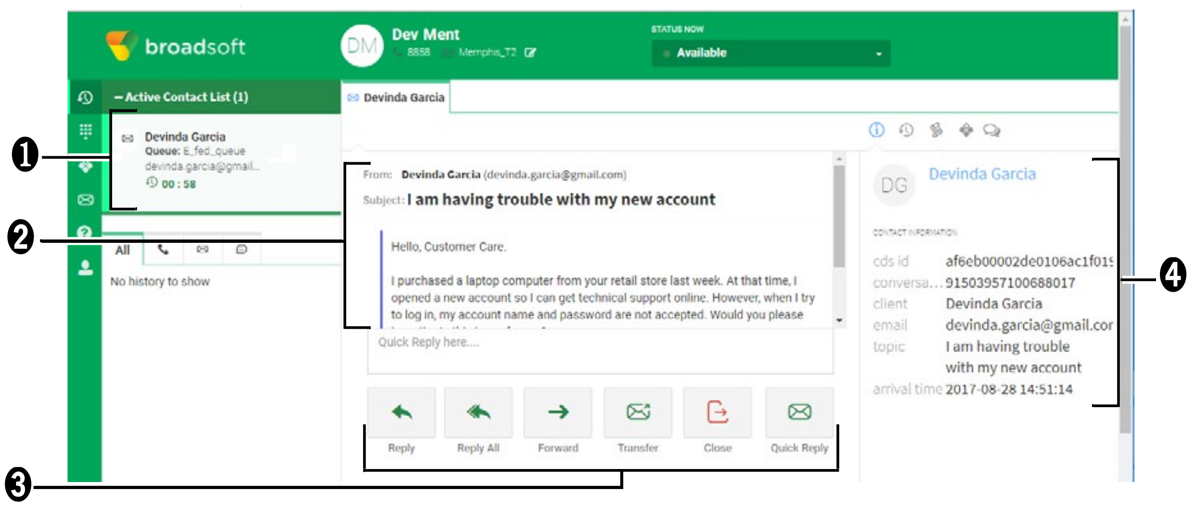
4 Handling Email Contacts

This chapter describes how to use the features of the CJP Agent Desktop when responding to customers by email.

Topics covered in this chapter:

About the Email Channel

If your CJP administrator has provided you with access to the email channel, you can respond to email messages sent to the contact center. Depending on permissions set in your Agent Desktop profile, you might also be able to send outgoing email messages. The following example shows an inbound email contact that has been accepted by the agent. You can point to icons on the Agent Desktop to display icon names.



❶ An email contact card in Active Contacts List ❸ Email control buttons

❷ The email message content ❹ Information about the customer

Responding to an Email Message

If your profile settings allow you to correspond with customers by email, email contact cards appear in the Active Contact List in the left panel of the Agent Desktop. The contact card displays the customer's name, the queue that routed the email contact to you, and a timer indicating how long the contact has been assigned to you.

There are two ways to respond to an email contact:

- A instant reply provides a quick way to respond to a simple question.
- A standard reply allows you to format reply text, add images to a message, incorporate content from resource templates, attach files, and so on.

Note: Security Compliance

If the content is identified as containing data that violates the Payment Card Industry Data Security Standard (PCI DSS), then:

- The email attachment is not sent.
- The email conversation is masked.

As part of security compliance, PCI DSS does not permit you to send sensitive information such as credit card data and other personally identifiable information (PII).

Topics covered in this section:

- Sending a Quick Reply
- Sending a Standard Reply

Note:

- If your CJP administrator has configured your system for auto-reply, when you accept an email contact card, the system sends a message to the customer indicating an agent will reply shortly.
- If you do not accept an email contact card within the time period configured by your CJP administrator, the contact card flashes for a few seconds in the Active Contacts List and then Redirect On No Answer (RONA) occurs. The unaccepted contact card is replaced in the queue and your agent state changes from Available to RONA. You must manually select **Available** in the STATUS NOW drop-down list before you can receive new contacts.
- If you need to make yourself unavailable when you complete an email reply (for example, you need to go on your lunch break), you can manually select an Idle state while you are in the Accept or Wrap Up state. When you send the email message, you are placed in the Idle state you selected and no contact cards are routed to you until you select **Available** in the STATUS NOW drop-down list (see "Agent Availability States" on page 13).

Sending a Quick Reply

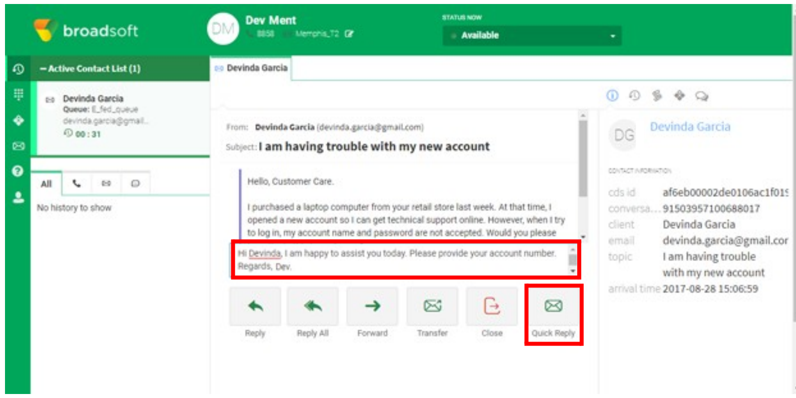
When an incoming email message requires a simple response, you can send a quick reply.

To send a quick reply:

1. Click **Accept** in the incoming email contact card.

   The email message appears in the center panel of the Agent Desktop.

2. In the text box below the email message, enter a response to the customerand click the **Quick Reply** button.



Note: If the incoming email message does not require a response, see "Closing a Message without Replying" on page 53.

3. Enter wrap up information and click **Wrap Up**. See "Wrapping Up Email and Chat Communications" on page 20.

Sending a Standard Reply

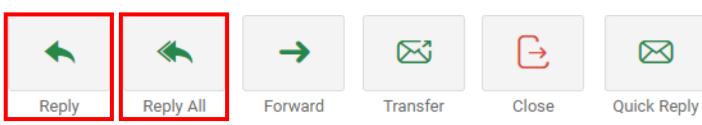
When you want to include information from a stored resource, include an image in a message, attach a file to a message, or format the text in your email response, you can send a standard reply.

To send a standard reply:

1. Click **Accept** in the incoming email contact card.

   The email appears in the center panel of the Agent Desktop.

2. Click the **Reply** button or the **Reply All** button.



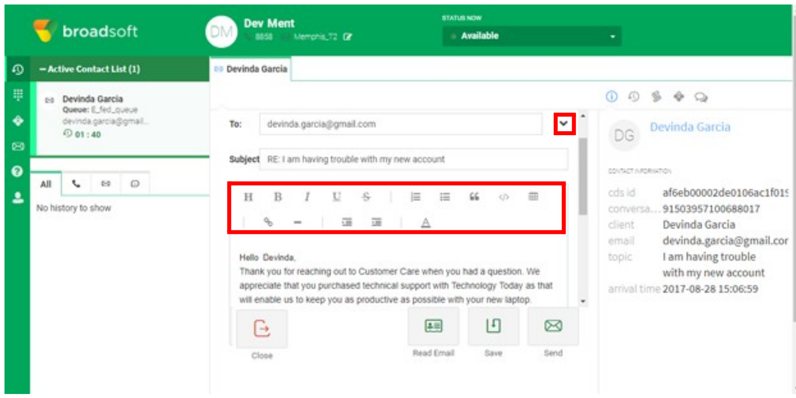
   A reply message appears with the customer's information in the **To** and **Subject** fields.

3. To skip replying now and re-display the customer's message, click the **Read Email** button.

Note: If the incoming email message does not require a response, see "Closing a Message without Replying" on page 53.

4. To reply to the customer, enter a message in the message body.

5. Optionally, click the down arrow to the right of the **To** field to display the **Cc:** and **Bcc:** fields and add more recipients. You can use the formatting tools to format text in the message body or add links or images to your reply, and so on.

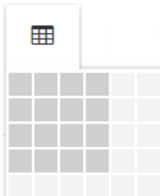


Tip: If your enterprise has developed resource templates for replying to commonly asked questions, you can use those templates in your responses to customers. For more information, see "Using Resource Templates when Handling Contacts" on page 56.

6. To format your reply, select from the options described in the following table.

Tip: After you apply a format, you can click its control again to undo the formatting effect.

H	Changes text in the selected paragraph to a preset point size. To remove the applied heading format, click **H** again and select **Text**.
B	Changes the selected text to boldface.
I	Changes the selected text to italics.
U	Underlines the selected text.
~~S~~	Draws a line across the selected text.
	Formats the selected paragraphs as a numbered list.
	Formats the selected paragraphs as an un-numbered list.

“	Indents the selected paragraph and marks it as a *quotation* with a vertical line at the left margin.
</>	Changes the selected text to a red, monospace typeface that resembles a code sample.
	Inserts a table in the message body. After you click the **Insert Table** button, drag the cursor to indicate the number of columns and rows the table contains. **Example:** How to create a table that contains four columns and four rows: 
	Inserts a hyperlink on the selected word in the message body that the recipient can click to display a web page. After selecting a word, click the **Hyperlink** button and specify the following options: • **Text** - Optionally, text that you want to appear in place of the link's URL. • **Url** - The URL of the web page. • **Target** - Select one of the following: – **Open Link in new window** to cause the message recipient's browser to open the target web page in a new browser window. – **Open link in current window** to cause the message recipient's browser to open the web page in the same window that is running the recipient's email client.
	Inserts an image from the internet into the message body. After clicking the **Insert Image** button, specify the following options: • **Url** - The URL of an image sourced from the internet. • **Alt** - Allows you to enter a short textual description of the image that is displayed in place of the image when the customer's system can't display the image itself. • **Size** - Allows you to specify the size of the image to be inserted. You can click the **Restore Original Size** button to reload an inserted image.
—	Inserts a horizontal line across the body of a message.
	Indents the selected paragraph.
	Returns the selected paragraph to the margin.

Tip: You can click the **Save** button at the bottom of your message to save your message as a draft. For information about viewing and activating saved messages, see "Accessing and Deleting Saved Messages" on page 53.

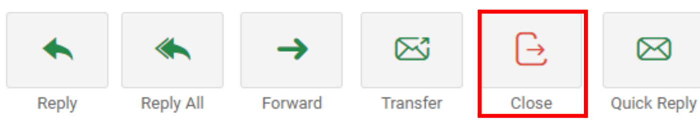
7. Click the **Send** button at the bottom your reply message.
8. Enter wrap up information and click **Wrap Up**. See "Wrapping Up Email and Chat Communications" on page 20.

Closing a Message without Replying

If an incoming email message you have accepted does not require a response, you can close the message and proceed to the Wrap Up state.

To close a message without replying:

1. Click the **Close** button below the message in the center panel of the Agent Desktop.



2. Enter wrap up information and click **Wrap Up**. See "Wrapping Up Email and Chat Communications" on page 20.

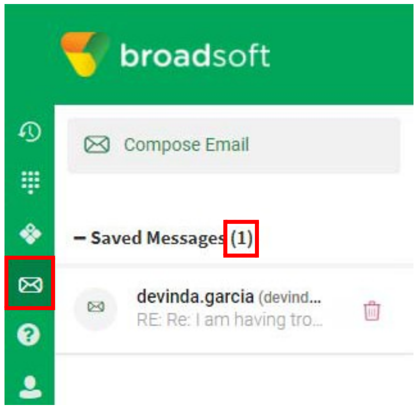
Accessing and Deleting Saved Messages

When you save a message as a draft, it appears in the Saved Messages list in the left panel of the Agent Desktop.

To access your saved messages:

1. Click the **Email** button in the navigation bar on the left side of the Agent Desktop.

The **Saved Messages** list appears beneath the **Active Contact List** in the left panel of the Agent Desktop. The number of saved messages is displayed.



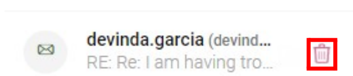
2. Do one of the following:

   - To open a saved message for editing, click the message in the list.

     The **Draft** tab opens in the center panel of the Agent Desktop. Enter valid email addresses and message text, and add an attachment if needed. For information about options for composing email messages within the Agent Desktop, see “Sending a Standard Reply” on page 50. For information about attaching files to an email message, see “Adding Attachments to Email Messages” on page 59.

     - OR -

   - To delete a saved email message, click the **Delete** button.



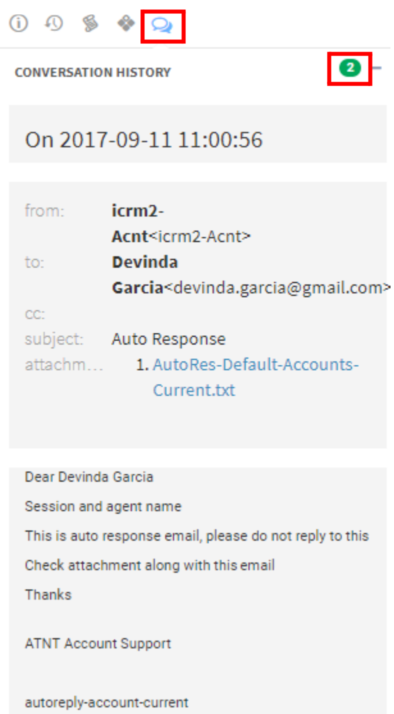
Viewing Email Conversation History

If the email message you are viewing is a reply in an ongoing conversation, you can view all of the messages in the conversation in the right panel of the Agent Desktop.

To view the history of an email conversation:

> Click the **Email Conversation** subtab in the right panel of the AgentDesktop.

A green badge in the upper-right corner of the Conversation History subtab indicates the number of email messages in the conversation.



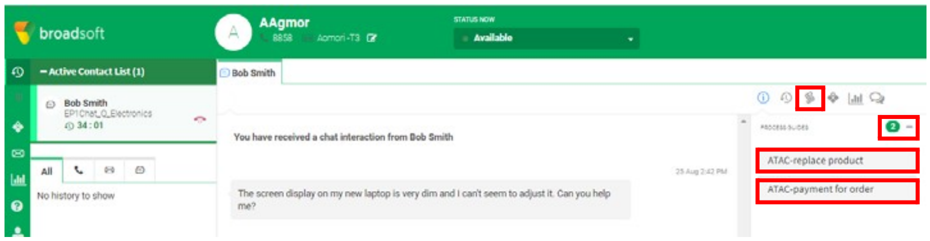
Viewing Process Guides

Your CJP administrator can upload process guides that you can access when you send an email or chat with customers. Process guides often contain procedures developed by your enterprise to help agents complete common tasks.

To access the process guides developed by your enterprise:

1. With a chat session or email message accepted and open, click the **Process Guide** subtab, at the top of the right panel of the Agent Desktop.

   If process guides have been made available in your contact center, you see a number in the upper right corner of the subtab. Click the + (plus) or - (minus) button to the right of the number to expand or collapse the list of process guides displayed.

2. Click a process guide in the list to display information about that process.

Using Resource Templates when Handling Contacts

Your enterprise has the option of developing prepared statements, or *resources*, to use when replying to common questions during chat sessions or in email replies. You can use resources prepared by experts in your enterprise and you can develop your own resources for your personal use.

Topics covered in this section:

- Accessing Shared Resources
- Creating a Custom Resource

Accessing Shared Resources

Your CJP administrator can make resource templates available to targeted teams of agents. Resources can be flagged as *suggested* based on the text a customer enters in a chat or email message, providing you with a shortened list you can scan for answers while working with customers.

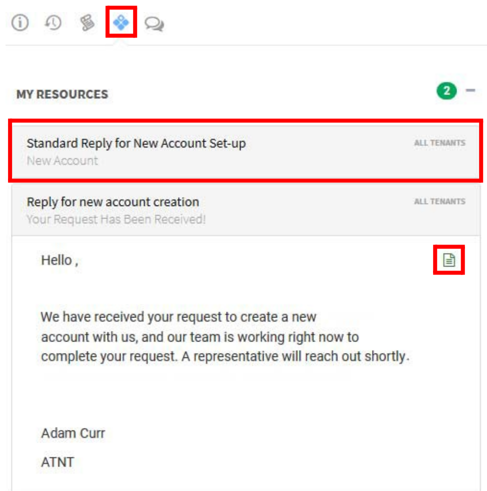
To use shared resources during a chat session or in an email message:

1. Click the **Resources** tab in the right panel of the Agent Desktop.

   A list of resources appears.

2. With an email message open or a chat session in progress, select the resource you want to use, and click the **Activate** button.



The content of the resource appears in the chat conversation or email message.

Note:

- You might see macros in the text of a resource. Macros are codes that are substituted with appropriate values (such as a customer's name), when chat or email message text is transmitted to the customer. For more information, see the description of macros in the next topic.
- You can edit resource text or add to it, if needed, to provide a complete and accurate response to a customer.

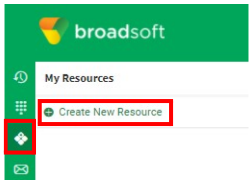
Creating a Custom Resource

You can create custom resource templates for use during chat sessions or in email messages. Custom resources are available only to you and cannot be shared with other agents in the contact center.

Note: When you use a custom resource in an email message and the message is routed through an outbound queue that is configured for manager approval, the content of your message and the resource it contains must be approved before the system sends the message to the customer.

To create a custom resource:

1. While logged in to the Agent Desktop, click the **Resources** button in the navigation bar.
2. Under My Resources, click **Create New Resource**.



The **Create New Resource** tab appears in the center panel of the Agent Desktop.

3. Enter appropriate information in the fields presented. Fields marked with an asterisk (*) are required.

Template Name*	The name of the resource as it will appear in the **My Resources** list.
Subject*	A short description of the resource.
Select Entry Point*	The CJP entry point of the contact (for example, Sales or Technical Support).
Select Channel*	Makes this custom resource available for use during chat sessions, in email messages, or both.
Macro	A text string composed of <tag> words that are substituted with appropriate values when the text is transmitted to a customer. **Example:** In future communications, please refer to this SessionID: <session>. When the customer sees this sentence it reads: In future communications, please refer to this SessionID: 123450. When using a macro in a resource, you are asked to specify: • *Session* values, which the Agent Desktop accesses from your current login session (for example, your name or the name of your enterprise). • *ContextData* values, which the Agent Desktop accesses from the current customer interaction (for example, the customer's name or the customer's email address).
Template Content*	The text that will be transmitted to the customer.
Add Attachment (email only)	This button enables you to attach a document file to a resource, which will be transmitted to the customer when you use the resource in an email message. You can pause the mouse pointer over the **Add Attachment** button to display a pop-up showing the name of the attached document.

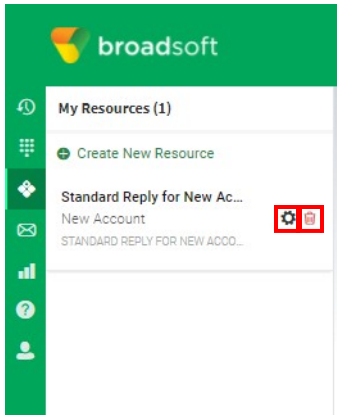
4. Click **Save** to save the custom resource in the **My Resources** list in the left panel of the Agent Desktop.

5. After you save a custom resource, you can:

   - Click the **Edit** button to reopen the resource for editing.

     - OR -

   - Click the **Delete** button to delete the resource.



Adding Attachments to Email Messages

You can attach files when you compose a standard reply or when you create an outbound email message (if available). You cannot attach files to instant replies.

To attach a file to an email message:

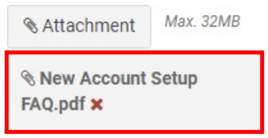
1. Follow the instructions in "Sending a Standard Reply" on page 50 or "Composing an Outbound Email Message" on page 62 to create an email message within the Agent Desktop.

2. In the center panel of the Agent Desktop, scroll down to the bottom of the body area and click the **Attachment** button.

   The Open dialog box appears.

3. In the Open dialog box, navigate to the file you want to attach, select the file, and click **Open**.

The filename of the attachment appears below the **Attachment** button in your message.



Note: The supported file formats are:.html .mhtml .mht .odt .pdf .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .dot .dothtml .dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pptxml .potm .potx .pps .ppam .ppsm .ppsx .pptx .pptm .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xltm .xlam .xlsb .xlsx

4. Optionally, repeat steps 2 and 3 to attach additional files.

Transferring an Email Contact Card

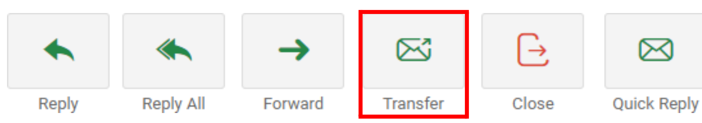
You can transfer an email contact card to a different queue or a specific agent in the contact center.

To transfer an email contact card to a specific queue or agent:

1. In the **Active Contact List**, click **Accept** to open the email message.

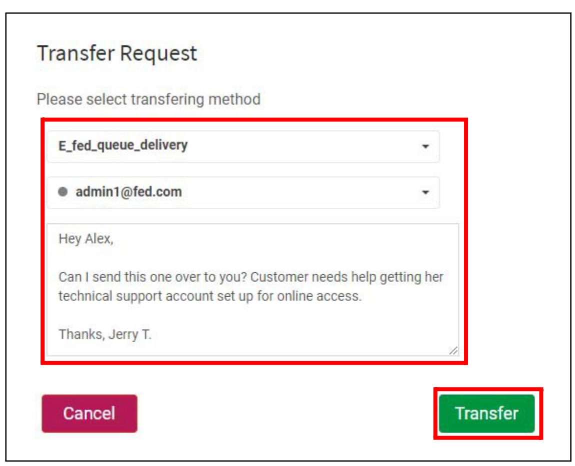
   The message appears in the center panel of the Agent Desktop.

2. Click the **Transfer** button below the message text.



   The **Transfer Request** dialog box appears.

3. Select a queue and optionally a specific agent from the drop-down lists, and then click **Transfer**.



Forwarding an Email Message

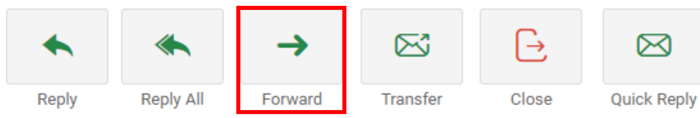
After you accept an email contact card, you can forward the message outside the contact center, if necessary. When you forward an email contact, recipients receive the message in their default email client.

To forward an incoming email message:

1. In the **Active Contact List**, click **Accept** in the email contact card to open the email message.

   The message appears in the center panel of the Agent Desktop.

2. Click the **Forward** button below the message text.

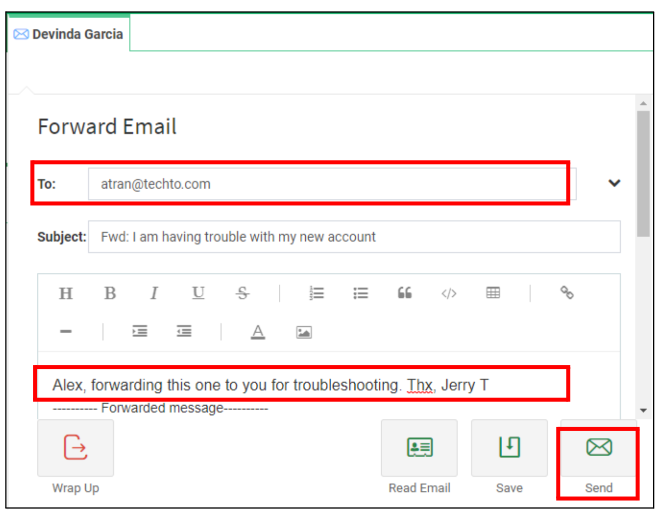
   

   The **Forward Email** subtab appears.

3. Enter one or more email addresses in the **To:** field, separating multiple addresses with semicolons (;).

4. Optionally, you can type a message in the message body explaining why you are forwarding the message.

5. Click the **Send** button below the message text.

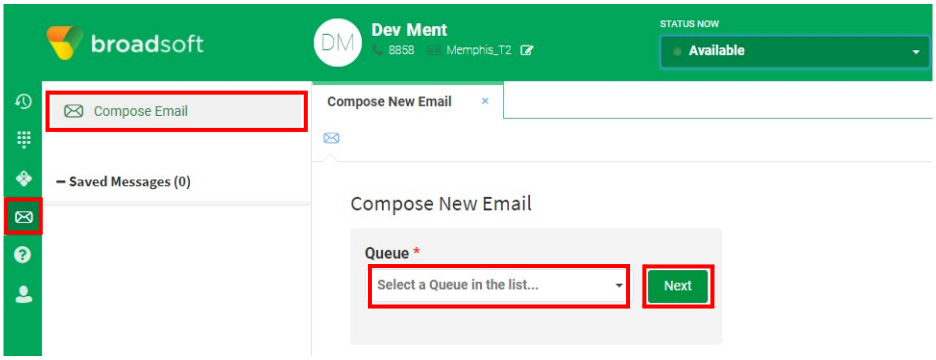
6. Enter wrap up information and click **Wrap Up**. See "Wrapping Up Email and Chat Communications" on page 20.

Composing an Outbound Email Message

If your profile allows you to create outbound email messages, you can use the Agent Desktop to send email messages outside the contact center.

To create and send an outbound email message:

1. Click the **Email** button in the navigation bar on the left side of the Agent Desktop, click **Compose Email** in the right panel, select an outbound queue from the list in the center panel, and then click **Next**.



   A blank email message appears in the center panel of the Agent Desktop.

2. Enter one or more email addresses, type your message, and click the **Send** button at the bottom of the center panel of the Agent Desktop.

   For information about message formatting options or saving your message as a draft, see "Sending a Standard Reply" on page 50. For information about attaching files to an outbound message, see "Adding Attachments to Email Messages" on page 59.

5 Handling Chat Contacts

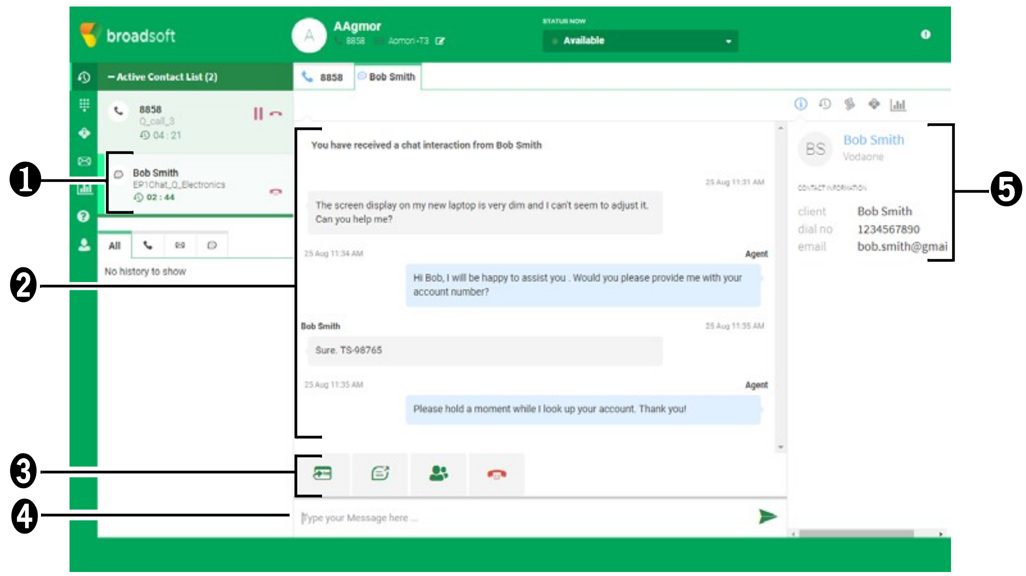
This chapter describes how to use the features of the CJP Agent Desktop when responding to contacts during chat sessions.

Topics covered in this chapter:

- About the Chat Channel
- Responding to a Chat Contact
- Closing a Chat Session
- Displaying Customer Sentiment Analysis
- Pushing a Web Page
- Conferring with Another Agent
- Transferring a Chat to Another Agent
- Interacting with Your Supervisor

About the Chat Channel

If your CJP administrator has provided you with access to the chat channel, you can respond to chat requests sent to the contact center. The following example shows an active chat conversation in the Agent Desktop. You can point to icons on the Agent Desktop to display icon names.



❶ A chat contact card in the Active Contacts List

❷ The chat message body

❸ The chat control buttons

❹ The text entry field for replying to the customer

❺ Information about the current customer

Responding to a Chat Contact

If your profile settings allow you to correspond with customers through chat sessions, chat contact cards appear in the Active Contact List in the left panel of the Agent Desktop. The contact card displays the contact's name, the queue that routed the chat contact to you, and a timer indicating how long the chat contact card has been assigned to you.

Note:

- If you do not accept a chat contact card within the period of time configured by your CJP administrator, the contact card in your Active Contacts List flashes for a few seconds and then Redirect On No Answer (RONA) occurs. The unaccepted contact card is replaced in the queue and your agent availability state changes from Available to RONA. You must manually select **Available** in the STATUS NOW drop-down list before you can receive incoming contacts.
- If you need to make yourself unavailable when you close a chat session (for example, you need to go on your lunch break), you can manually select an Idle state while you are in the Accept or Wrap Up state. When you close the chat session, you are placed in the Idle state you selected and no contact cards are routed to you until you select **Available** in the STATUS NOW drop-down list (see “Agent Availability States” on page 13).

To accept a chat request to converse with a customer:

1. In the **Active Contact List**, click the **Accept** button in the chat contact card.

   A new chat conversation opens in the center panel of the Agent Desktop. The conversation displays the customer’s name in the chat tab label.

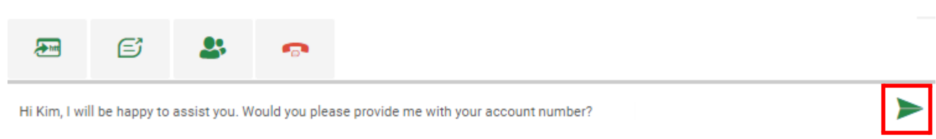
2. Do one of the following:

   - To provide a custom response to the customer’s question, enter a reply in the text box below the chat control buttons.

     - OR -

   - To use a shared or custom resource in your response, select a resource in the **Resources** subtab in the right panel of the Agent Desktop (see “Using Resource Templates when Handling Contacts” on page 56).

3. Click the **Send** button on the right side of the message entry field or press Enter on your keyboard.



Note: **Security Compliance**

If the content is identified as containing data that violates the Payment Card Industry Data Security Standard (PCI DSS), then:

- The chat attachment is not sent. The supported file formats are: .html .mhtml .mht .odt .pdf .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .dot .dothtml .dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pptxml .potm .potx .pps .ppam .ppsm .ppsx .pptx .pptm .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xltm .xlam .xlsb .xlsx
- The chat conversation is masked.

As part of security compliance, PCI DSS does not permit you to send sensitive information such as credit card data and other personally identifiable information (PII).

4. Repeat steps 2 and 3 until the customer's question is answered.

5. When chatting with a customer, you have these additional options:

   - To include a URL that opens a web page in the customer's browser, see "Pushing a Web Page" on page 67.
   - To request help from another agent or supervisor, click the **Conference** button below the chat message. See "Conferring with Another Agent" on page 68.
   - To transfer the chat discussion to another agent, click the **Transfer** button below the chat message. See "Transferring a Chat to Another Agent" on page 70.

   Note: Supervisors can join your chat session with a customer or coach you privately during chat sessions. See "Interacting with Your Supervisor" on page 71.

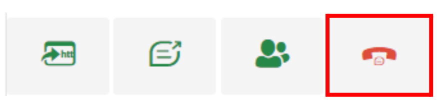
6. When a customer's questions have been answered, see the next section.

Closing a Chat Session

When a customer's questions have been answered, it is a best practice to ask the customer to close the chat session. When the customer closes a chat session, a message appears in the chat conversation indicating the customer has left the session. You also need to close the chat session in the Agent Desktop so you can enter Wrap Up codes.

To close a chat session in the Agent Desktop:

1. In an active chat session, click the **End Chat** button below the chat conversation.



2. Enter wrap up information and click **Wrap Up**. See "Wrapping Up Email and Chat Communications" on page 20.

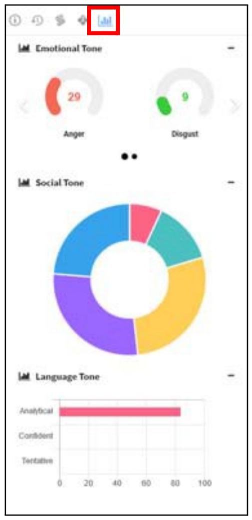
Displaying Customer Sentiment Analysis

If your CJP administrator has configured the customer sentiment analysis feature, you can get a real-time assessment of a customer's satisfaction or frustration level during a chat session. Sentiment analysis metrics are supplied by IBM Watson® technology.

To display customer sentiment analysis:

> In an active chat session, click the **Analytics** button in the right panel of the Agent Desktop.

The sentiment meters appear, which measure the customer's level of satisfaction or displeasure during a chat session.



Only customer sentiments are measured and reported in sentiment analytics. Any sentiment expressed in agent responses is not reflected in the sentiment analytics metrics.

Pushing a Web Page

If you want to share a website with a customer during a chat session, you can *push* a URL and the target web page will appear in a new window in the customer's browser.

Note: If pop-ups are not enabled in a customer's browser, customers receive a URL hyperlink and can open the URL at their convenience.

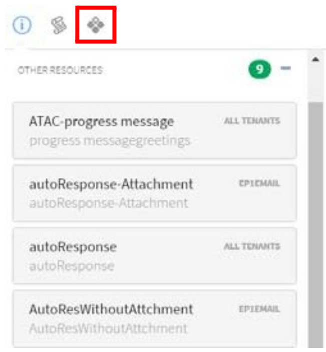
To push a web page in an active chat session:

1. Do one of the following.

    - In the text field below the chat conversation, enter the URL for the web page that you want to share with the customer.

      - OR -

    - In the right panel of the Agent Desktop, click the **Resources** subtab, and then double-click a resource containing the URL you want to share with the customer. See "Using Resource Templates when Handling Contacts" on page 56 for more information.



2. Click the **Push URL** button below the chat conversation.

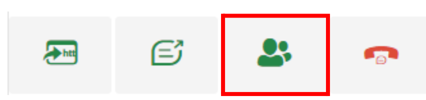
Note: If the customer started the chat session from a secure web page (HTTPS), you can push only HTTPS URLs during the chat session.

Conferring with Another Agent

You can request assistance from a colleague during a chat session or you can set up a conference between the customer, yourself, and one or more agents. When you confer with other agents during a chat session, a message appears in the chat conversation announcing who has joined the conversation. A subtab also appears in the Agent Desktop where you can converse privately with other agents.

To invite other agents to join an active chat session:

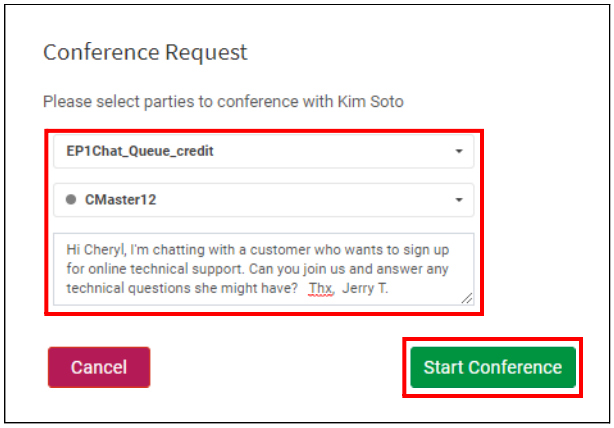
1. Click the **Conference** button below the chat conversation.



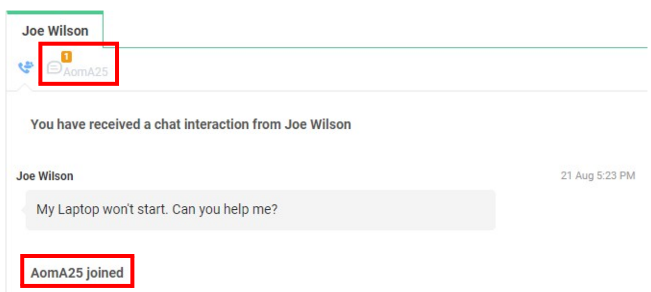
The **Conference Request** dialog box appears.

2. Select a queue from the drop-down list.
3. Optionally, select a specific agent from the drop-down list who is assigned to that queue.

4. Enter a short message describing why you want to confer with another agent, and click **Start Conference**.

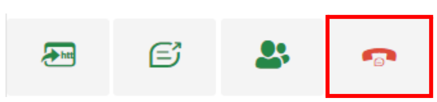


A message is posted in the chat conversation indicating that another agent has joined the session with the customer. In addition, a subtab appears on the right side of the center panel of the Agent Desktop displaying a private chat session between you and the other agent. If a reply is posted in either subtab when it is in the background, a numbered badge appears on the tab alerting you that a new reply is available for viewing.



Note: If you have invited multiple agents to the private chat session, you can confer with one agent privately by selecting that agent from a drop-down list in the private chat session.

5. Click the **End Chat** button below the private conversation to close the private chat session. (Any agent in a private conversation can leave at any time by clicking the **Close** button.)



6. Click the **End Chat** button below the customer conversation to leave the chat session completely.

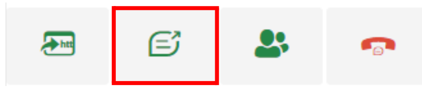
   Note: If the private chat session is open when the conferenced agent clicks the **End Chat** button in a chat session that includes a customer, a message is posted in both chat sessions that announces the consulting agent has left.

7. Enter wrap up information and click **Wrap Up**. See “Wrapping Up Email and Chat Communications” on page 20.

Transferring a Chat to Another Agent

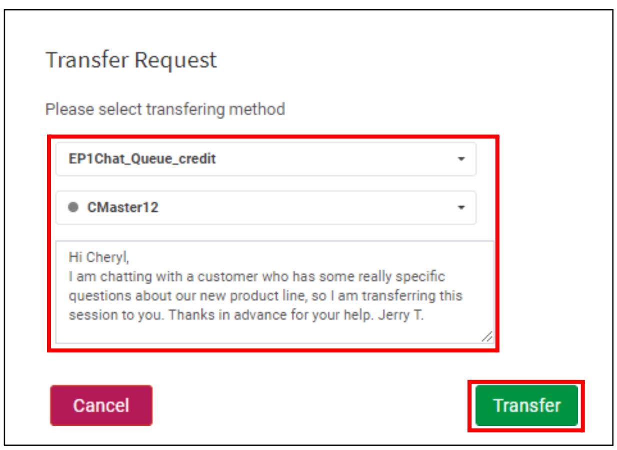
To transfer a chat request to another agent:

1. Click **Accept** in the chat contact card to open a chat session with the customer.
2. Click the **Transfer** button below the chat conversation.



The **Transfer Request** dialog box appears.

3. Select a queue from the drop-down list.
4. Optionally, select a specific agent from the drop-down list who is assigned to that queue.
5. Enter a short message describing why you want to transfer the chat session, and then click **Transfer**.



A message is posted to the customer indicating that the chat session has been transferred to another agent and the original agent has left the session.

6. Enter wrap up information and click **Wrap Up**. See “Wrapping Up Email and Chat Communications” on page 20.

Interacting with Your Supervisor

Supervisors can coach you privately while you are chatting with a customer or join a chat session.

- When a supervisor coaches during a chat session, a separate subtab opens in the center panel of the Agent Desktop. You and your supervisor can conduct a private conversation in this subtab. During a coaching session, the customer you are chatting with does not have access to the conversation between you and your supervisor.
- When a supervisor joins a chat session in progress, the supervisor's responses appear in the chat conversation in the center panel of the Agent Desktop and in the customer's chat transcript.

6 Viewing Agent Statistics

If the Agent Statistics button is displayed on the navigation bar, you can click it to open the Agent Personal Statistics tab.

This tab displays up to seven sections, depending on how your service is configured. If a statistic is not enabled in your profile, you will see a “No Access” message when you display the section.

In three of the statistics sections (Agent Statistics, Agent Outdial Statistics, and Team Statistics) you can click a button on the upper-right side of the APS tab to switch between real-time and historical reports. Real-time reports display statistics since you logged in and historical reports display statistics for the last 24 hours.

By default, the real-time information displayed in the tabs is refreshed every 90 seconds, but the refresh time provisioned for your enterprise might be different. You can refresh real-time and historical table information at any time by clicking the **Reload** button on the bottom right side of the APS tab.

Topics covered in this chapter:

- Agent Statistics
- Agent Outdial Statistics
- Team Statistics
- Queue Statistics
- Threshold Alerts
- Agent Threshold Alerts
- Call Recordings

Agent Statistics

If enabled in your profile, the Agent Statistics section displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing the amount of time you spent in each agent state and a table displaying the following information.

Column	Description
Agent Name	Your user name. If your enterprise uses the email and chat channels and the report includes more than one channel, you can click the collapse arrow (Down Arrow) or expand arrow (Right Arrow) to the left of your user name to collapse or expand the data grouped by channel type.
Login Time	The time you logged in.
Current State	The agent state you are currently in.
Calls Handled	The total number of calls you have handled. Rest the cursor over a number in this column to display a pop-up showing the wrap up codes you entered and how many times you entered each code.
Average Handle Time	The average length of time you spent handling a call (total talk time plus total hold time and total wrap up time, divided by total number of connected calls).
Idle Count	The number of times you went into the Idle state. Rest the cursor over the number in this field to see the Idle codes you entered and how many times you entered each code.
Total Idle Time	The amount of time you spent in the Idle state.
Average Idle Time	The average length of time you spent in the Idle state (Idle time divided by Idle count).
Available Count	The number of times you went into the Available state.
Total Available Time	The amount of time you spent in the Available state.
Average Available Time	The average length of time you spent in the Available state (available time divided by available count).
Consult Count	The number of times you answered a consult request plus the number of times you consulted another agent during a call.
Consult Time	The amount of time you spent being consulted by another agent plus the amount of time you spent consulting another agent during calls.
Hold Count	The number of times you put a caller on hold.
Hold Time	The amount of time calls were on hold.
Conference Count	The number of times you established a conference call with the caller and another agent.

Column	Description
Occupancy	The measure of time you spent on customer contacts compared to Available and Idle time, calculated by dividing total connected time (talk time plus hold time) plus total wrap up time by total time you were logged in.

Agent Outdial Statistics

If available at your enterprise and enabled in your profile, the Agent Outdial Statistics section displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing the amount of time you spent in each agent state during outdial calls and a table displaying the following information.

Column	Description
Agent Name	Your user name. If your enterprise uses the email and chat channels and the report includes more than one channel, you can click the collapse arrow (Down Arrow) or expand arrow (Right Arrow) to the left of your user name to collapse or expand the data grouped by channel type.
Login Time	The time you logged in.
Outdial Calls Handled	The total number of outdial calls you have handled.
Average Outdial Handle Time	The average length of time you spent handling an outdial call (total outdial talk time plus total outdial hold time and total outdial wrap up time, divided by total number of outdial connected calls).
Total Outdial Connected Time	The amount of time you were connected to outdial calls.
Total Outdial Talk Time	Total amount of time you spent talking on outdial calls (this does not include hold time).

Team Statistics

If enabled in your profile, the Team Statistics section displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing agent activity for the team listed first in the table, and a table displaying the following information for specified teams.

Column	Description
Team Name	The name of the team.
Total Logged In	The number of agents on the team who are logged in (real-time view) or were logged in during the last 24 hours (historical view).
Idle	The number of agents on the team who are in the Idle state (real-time view) or were in the Idle state during the last 24 hours (historical view).
Available	The number of agents on the team who are in the Available state (real-time view) or were in the Available state during the last 24 hours (historical view).
Connected	The number of agents on the team who are connected with a caller (real-time view) or were connected with a caller during the last 24 hours (historical view).
Consulting	The number of agents on the team who are consulting with another agent (real-time view) or were consulting with another agent during the last 24 hours (historical view).
Wrap Up	The number of agents on the team who are in the Wrap Up state (real-time view) or were in the Wrap Up state during the last 24 hours (historical view).
Not Responding	The number of agents on the team who are in the Not Responding state (real-time view) or were in the Not Responding state during the last 24 hours (historical view).
Outdial	The number of agents on the team who are connected to or are wrapping up an outdial call (real-time view) or were connected to or wrapping up an outdial call during the last 24 hours (historical view).

Queue Statistics

If enabled in your profile, the Queue Statistics section displays the information for specified queues described in the following table.

Column	Description
Queue Name	The name of the queue.
In Queue	The number of calls currently in the queue.
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue.
Longest Time In Queue	The longest amount of time a call has been in the queue.

Threshold Alerts

If available at your enterprise and enabled in your profile, the Threshold Alerts section displays information about thresholds that have been breached.

Column	Description
Entity Type	The entity type associated with this threshold alert: Entry Point, Queue, Site, or Team.
Entity Name	The name of the entry point, queue, site, or team to which the alert applies.
Metric	The metric with which the threshold is associated.
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Trigger Value	The value of the metric that the threshold rule defined as the trigger.
Trigger Interval	The number of seconds during which the system will generate only one alert for the threshold rule check.
Current Value	The current value of the metric that was breached.
Event Time	The time the threshold rule was breached.
Generated Time	The time the alert was generated.

Agent Threshold Alerts

If available at your enterprise and enabled in your profile, the Agent Threshold Alerts section displays information about thresholds that you have breached.

Column	Description
Entity Type	The entity type associated with this threshold alert: Agent.
Entity Name	Your user name.
Metric	The metric with which the threshold is associated.
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Trigger Value	The value of the metric that the threshold rule defined as the trigger.
Trigger Interval	The number of seconds during which the system will generate only one alert for the threshold rule check.
Current Value	The current value of the metric that was breached.
Event Time	The time the threshold rule was breached.
Generated Time	The time the alert was generated.

Call Recordings

If available at your enterprise and enabled in your profile, the Call Recordings section provides access to recordings of the calls you handled in the last 24 hours.

Column	Description
Team Name	The name of the team for which you handled the call.
Play	To play or download a call recording, click the **Play** button and in the dialog box that opens, specify whether you want to open or save the file. When you click **Open**, the media player installed on your computer opens and plays the file. If a compatible media player is not installed, a dialog box opens and prompts you to download a player.
Queue Name	The name of the queue the call came in on.
ANI	The caller’s phone number or, in the case of an outdial call, the phone number of the agent who made the outdial call.
DNIS	The phone number the caller dialed.
Duration	The amount of time between when the call recording started and when it ended.

Column	Description
Date	The date the call recording file was made.
Call Session ID	A value assigned by the system that uniquely identifies the call.