Contact Center Anywhere Interaction Manager Guide (Legacy Client)

Version 8.1.1

September 2007

ORACLE®

Contents

1 What's New in This Release

What's New in Contact Center Anywhere Interaction Manager Guide (Legacy Client), Version 8.1.1

Table 1 lists changes described in this version of the documentation to support release 8.1.1 of the software.

Table 1. New Product Features in Contact Center Anywhere Interaction Manager Guide (Legacy Client), Version 8.1.1

Topic	Description
See "Disconnecting a Caller" on page 74.	In an emergency, you can initiate a Call Trace, which will begin recording the interaction. The Call Trace feature also sends an SNMP trap that includes information regarding the calling party for emergency tracing of the call.
See "Recording a Caller" on page 71.	You an select Stop Recording to immediately stop recording all types of recorded interactions (including quality, transaction, and emergency recordings (Call Trace).

2 Introduction

This chapter describes the Interaction Manager (IM), the agent's user interface to the Contact Center Anywhere (CCA) application. It also describes terminology and navigation. It includes the following topics:

- About Interaction Manager (IM)
- Projects and Workgroups
- IM Features and Benefits
- A Quick Tour
- Understanding the Information Bar
- Phone Line Status Icon
- Agent Status
- Availability Icons
- Number of Waiting Interactions
- Web Server Status
- Contact Information for the Active Interaction
- Time in Queue
- Customer Priority Rating
- Information Bar - Detailed Information View
- Interaction Bar
- Call Control Screen

About Interaction Manager (IM)

Interaction Manager (IM) is a Web-based call control and contact management tool for contact center agents. Using IM, agents can communicate with customers in different ways, including by phone, email, and the Web. Because IM is browser-based, agents can work from any computer that has access to the Internet.

In general, an *interaction* occurs any time a customer tries to reach the contact center; usually by phone, email, or Web-chat, although an interaction can also occur when the customer leaves a voicemail message or asks an agent to call back.

Most of the time, customers contact your contact center (as opposed to directly calling or emailing you), and the CCA software routes or *offers* the interaction to an agent.

NOTE: You need Internet Explorer, version 6.0 or above, to launch the application the first time, to access the application's online help, and to push pages.

Projects and Workgroups

This manual occasionally refers to *Projects* and *Workgroups*. Your administrator creates projects and workgroups for your contact center. They help connect the customer to the agent who most likely has the information the customer needs.

In general, customers dial a phone number associated with a project. Examples of projects include *Sales*, *Technical Support*, *Accounts*, and so on. Each project can send calls to one or more workgroups. For example, the *Technical Support* project could route customers to the *UNIX - English* or *UNIX - Spanish* workgroups.

A workgroup is basically a list of agents that are grouped together by skills or job function. For example, if you speak Spanish and are an expert in UNIX, your administrator will probably put your name in the *UNIX - Spanish* workgroup. Thus, when a Spanish-speaking customer calls with a UNIX question, the application routes the customer to someone in that specific workgroup first.

IM Features and Benefits

- Browser-based interface, allowing agents to work locally (intranet) or remotely (Internet)
- Multimedia ready, accepting phone calls, emails, and Web originated chats and callback requests
- Conferencing feature allowing agents, supervisors, and customers in the same phone conversation.
- Interaction history showing what happens to customers when they reach your contact center.
- Full billing control, so you can account for all calls
- Automatic contact screen pop-up using ANI (Automatic Number Identification) or email address
- Automatic display of project name or phone number (DNIS) with each interaction
- Web callback feature with support for specific contact center scripts. Agents can get back to Web customers quickly and with the information the customer needs
- *Optional* predictive and preview dialing features with support for specific contact center scripts.

A Quick Tour

Figure 1 shows the IM's main screen and identifies some of the major areas you will frequently use.

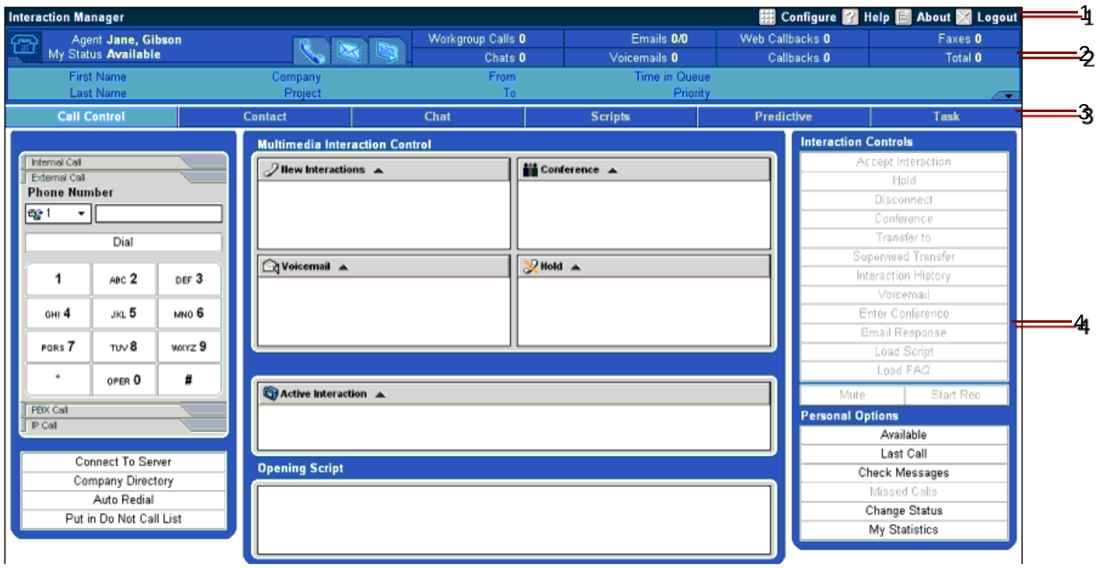


Figure 1. Interaction Manager Screen Overview

This chapter provides an overview for each of the main parts of the Interaction Manager (IM) screen shown in Figure 1 and described in Table 1.

Table 2. Interaction Manager Main Screen Components

Section # in Figure	ID
1	Configure Link, Help Link, About Link, and Logout Link
2	Information Bar - Detailed Information View
3	Interaction Bar
4	Call Control Screen, Contact Screen, Chat Screen, Scripts Screen, Predictive / Preview Screen, Task Screen, and Custom Screen.

NOTE: Regardless of which IM screen is open, the Configure / Help About / Logout Links (#1 in the figure) and the Information Bar (#2 in the figure) always appear at the top of the screen.

Configure Link

At login, it is a good time to ensure that Interaction Manager is configured with your correct Phone Extension and Email information.

To do this, you must access the Configuration Menu by clicking the **Configure** link (Figure 2) located at the top right of the Interaction Manager screen.

Figure 2. Configure/Help/About/Logout Buttons

From the Configure Menu, you can set:

- incoming interaction preferences
- the email client
- your telephone number
- customized icons
- time zone formatting
- date formatting
- your agent voicemail recording (welcome prompt)

TIP: For details about configuring IM, see "Configuring Interaction Manager" on page 31.

Help Link

Click this link to open the *Interaction Manager Online Help*. Click the navigation buttons, drop-down list, or hyperlinked text to navigate to the area of interest.

About Link

Click this link to view the copyright and date information for your version of CCA (Figure 3).

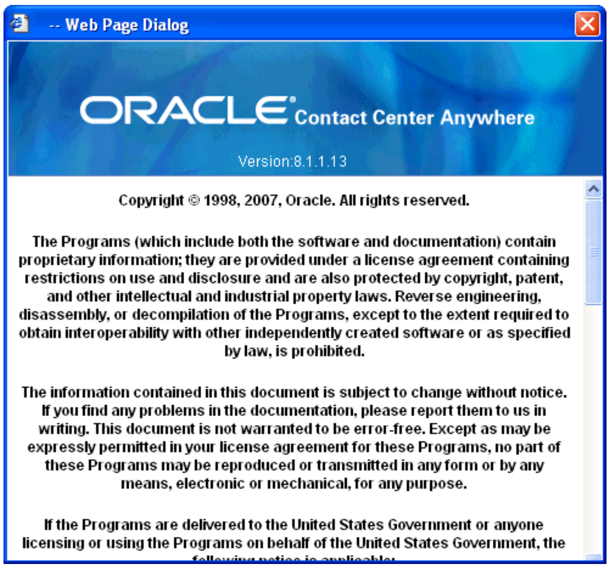


Figure 3. Example About Page

Logout Link

1 Click this link to logout of your IM session. A confirmation message appears (Figure 4).

Figure 4. Logout Confirmation Message

2 Click **OK**.

Understanding the Information Bar

At the top of the IM screen, an Information Bar (Figure 5) provides real-time information about:

- Phone Line Status Icon

- Agent Status
- Availability Icons indicating which Interaction Types you can receive
- Number of Waiting Interactions of each media type
- Web Server Status
- Contact Information for the Active Interaction

  TIP: If a Contact has been assigned, see Chapter 10, "Managing Contacts."

- Time in Queue (Elapsed, Wrap-up)
- Customer Priority Rating

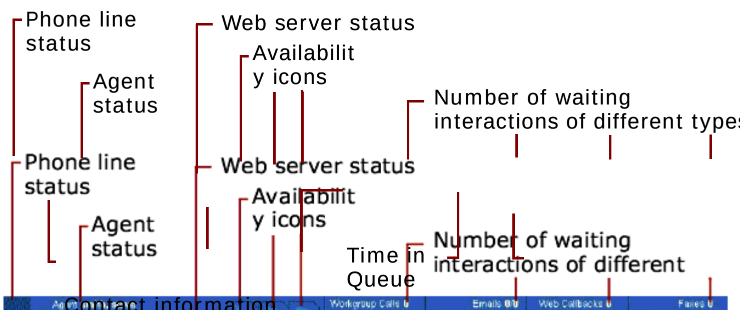


Figure 5. IM Information Bar

Phone Line Status Icon

The Phone Line Status icon indicates the current state of your phone extension. Table 3 shows the different status icons and their meanings.

Table 3. Phone Line Status Icons

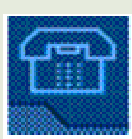
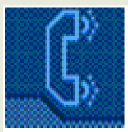
Phone Line Status Icon	Description
	Your phone *can* receive calls.
	Your phone is *off-hook*, but that you are not speaking. (You may be dialing a number, your caller may be on hold, and so on.)

Table 3. Phone Line Status Icons

Phone Line Status Icon	Description
	Your phone is *ringing*.
	You are *speaking* with a caller.

Agent Status

The Information Bar indicates your current status in the *My Status* field. Table 4 lists the predefined system statuses, the condition that triggers the status, and whether you can receive new interactions while you are set to the status.

Table 4. Agent Statuses

Status	Meaning	Condition
Available	Available	You are not currently handling an interaction. You can manually select this status or you can receive this status after completing an interaction (configured by your administrator).
Busy	Busy	You are not available to receive any other ACD interactions.
Last Call	Busy	You will not take any more interactions after you finish the current interaction. You can set this status.
On Break	On break	You are not available to receive interactions. You can set this status. **NOTE:** *No Answer* appears if you do not accept a workgroup interaction within the time limit. No Answer is the same as *On Break*.

NOTE: Your administrator may have added additional statuses that control your availability. Consult your administrator for a description of custom statuses.

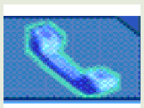
While your supervisor views your status in real-time, and CCA tracks your status for reporting during your IM session, the *My Status* value is primarily for tracking.

To determine if you are presently available to receive interactions, always refer to the Agent Status.

Availability Icons

The Availability icons indicate your ability to receive interactions by displaying one of three possible conditions: Phone, Envelope, and Chat. Table 5 shows each icon and provides a description.

Table 5. Availability Icons

Availability Icon	Description
	Phone Handset: ■ When *bright*, you are available to receive phone interactions (calls, callbacks, Web callbacks, and so forth). ■ When *dimmed*, you are not available to receive additional phone interactions.
	Envelope: ■ When *bright*, you are available to receive additional email interactions. ■ When *dimmed*, you are not available to receive additional email interactions.
	Chat: ■ When *bright*, you are available to receive additional chat interactions. ■ When *dimmed*, you are not available to receive additional chat interactions.

Number of Waiting Interactions

For each interaction type (such as workgroup calls, chats, emails, voicemails, Web callbacks, callbacks, and faxes) a number appears to show how many of each interaction is waiting in the queue. The total number of interactions waiting in the queue also appears.

Notice that for email interactions, the banner shows two numbers (such as 0/0, 1/5, and so on.)

- The first number is the number of emails that are waiting in the *project* queue.
- The second number is the number of emails that are still to be *downloaded* from the POP3 server.

Web Server Status

If IM becomes disconnected from CCA, a red *Offline indicator* appears on the Information Bar.

- While disconnected, CCA does not route interactions to you, but automatically attempts to restore your connection.
- When CCA restores your connection, the *Offline indicator* disappears.

Contact Information for the Active Interaction

If a contact is assigned, all information previously recorded about the customer appears in this area of the Information Bar.

TIP: For more information, see Chapter 10, "Managing Contacts."

Time in Queue

This area of the Information Bar displays how long the customer interaction has been waiting in the queue.

Customer Priority Rating

Your administrator can assign a Customer Priority level (Figure 6) to known customers of your Company. Contact Center Anywhere routes customers with a high priority before low priority customers. This ensures that important customers receive immediate attention. (By default, all customers have a three-star rating.)

Figure 6. Customer Priority

NOTE: For first time callers, or for customers for whom your administrator has not assigned a priority level, CCA displays the priority level of the *Project* through which the customer reached the contact center.

Information Bar - Detailed Information View

For all Web callback, ACD callBack, and chat interactions, view additional contact information by moving your mouse pointer over the arrow located in the lower-right corner of the Information Bar (Figure 7).

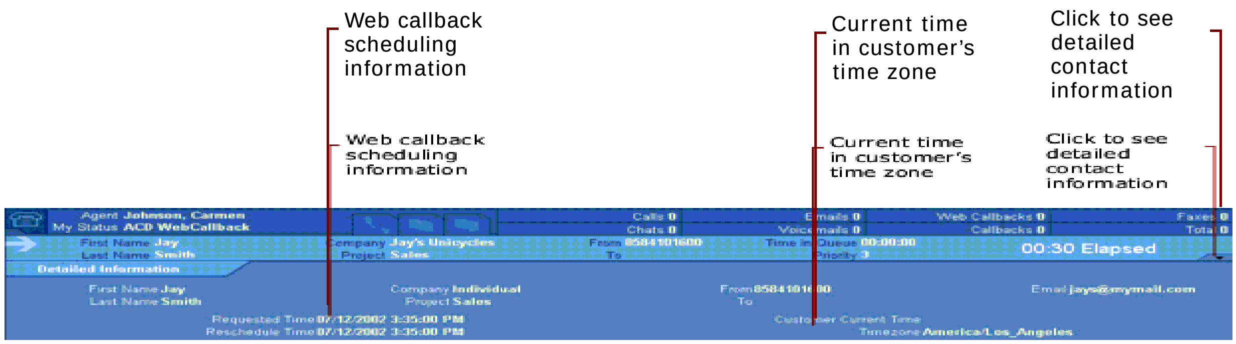


Figure 7. Information Bar: Expanded View

NOTE: Some information, such as *Requested Time* and *Scheduled Time*, appear in the Detailed Information panel only if the active interaction is a Web callback interaction.

TIP: For more information, see Chapter 10, “Managing Contacts.”

Interaction Bar

The Interaction Bar (Figure 8) appears just below the Information Bar. From here, you can access several different interaction types:

- Call Control Screen
- Contact Screen
- Chat Screen
- Scripts Screen
- Predictive / Preview Screen
- Task Screen

- [Custom Screen] (CRM Integration to an external application)

NOTE: The interaction types you can access depend upon your system's configuration and your workgroup.

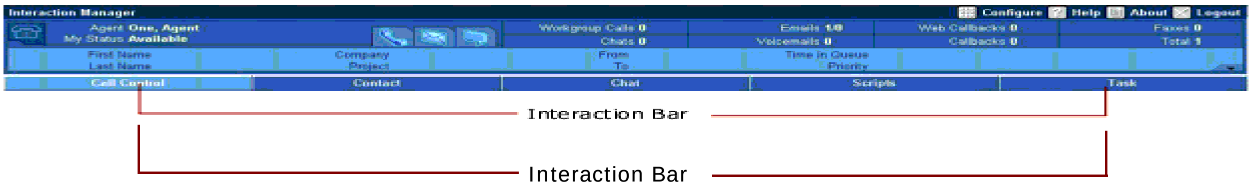


Figure 8.   Interaction Bar

Call Control Screen

The Call Control Screen (Figure 9):

- Contains a *Dialer* and other controls for making outgoing calls.

  TIP: For more information, see Chapter 4, "Making and Billing Calls."

- Alerts you to incoming interactions.
- Displays the interaction type and all available information about the caller.
- Provides controls for handling or redirecting the call.

- Has controls for managing your availability, checking messages and missed calls, and for configuring IM.

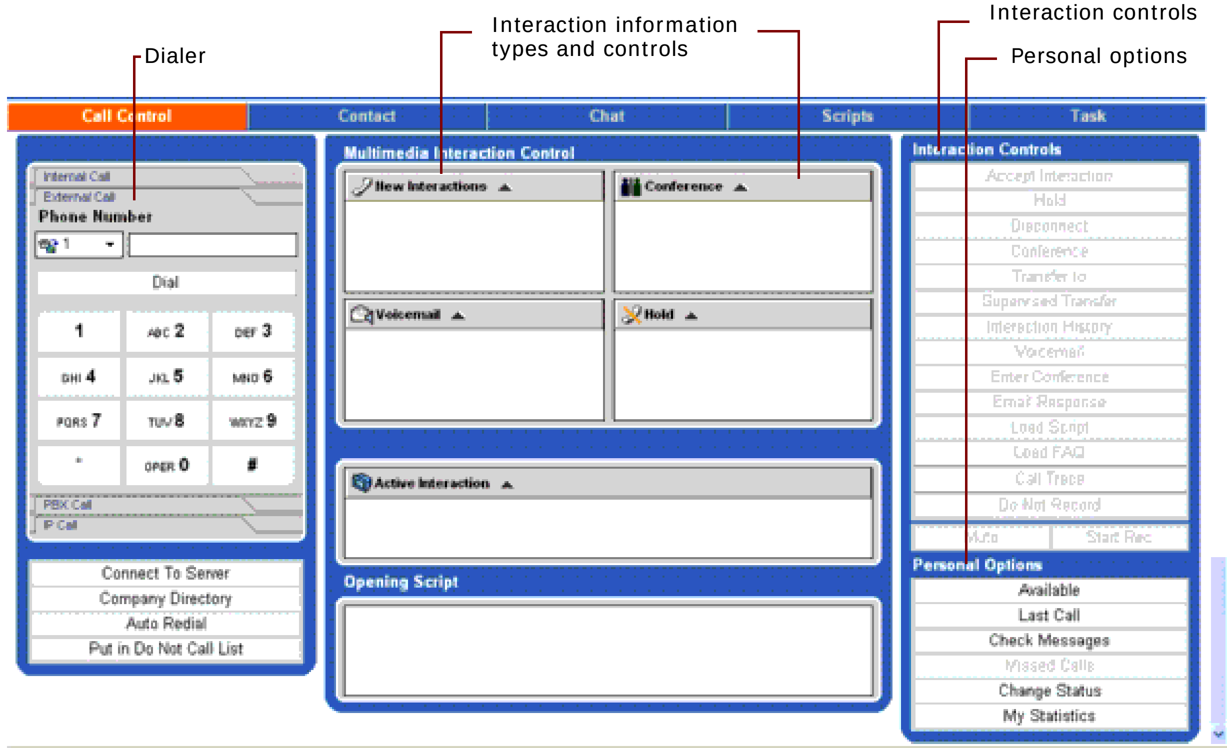


Figure 9. Call Control Screen

Contact Screen

The Contact Screen (Figure 10) lets you:

- Find/enter/modify customer contact information
- Assign a contact to an interaction
- Enter notes about a contact

- Initiate an outbound interaction to the contact

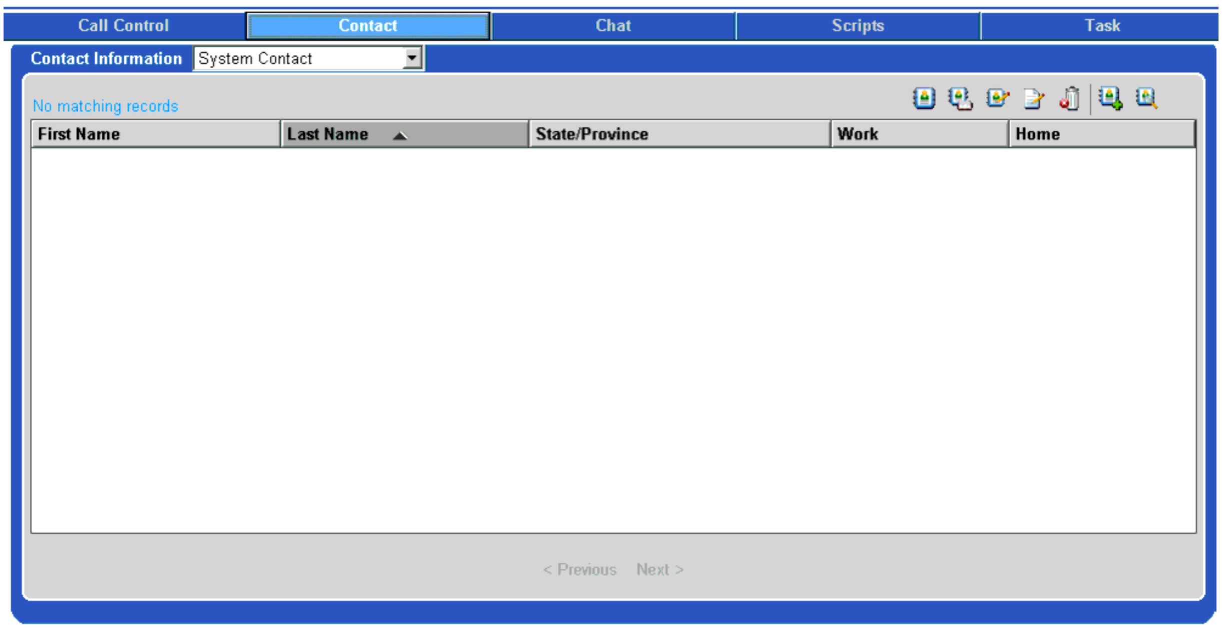


Figure 10. Contact Screen

When information about callers resides in the contact database, then as interactions come into the contact center, CCA automatically gathers and fills in any information using the caller ID, ANI, or email address headers.

You can link additional information (such as a caller's name, address, and so forth) directly to the captured phone number or email address.

Once linked to a phone number or email address, CCA retrieves and instantly displays information about the caller on your (or any other agent's) screen the next time the caller contacts the contact center.

Chat Screen

Using the Chat Screen (Figure 11) you can:

- Engage in real-time text chats with contact center customers.

- Take control of a customer's browser to assist the customer in completing a task, by using Chat screen collaboration controls.

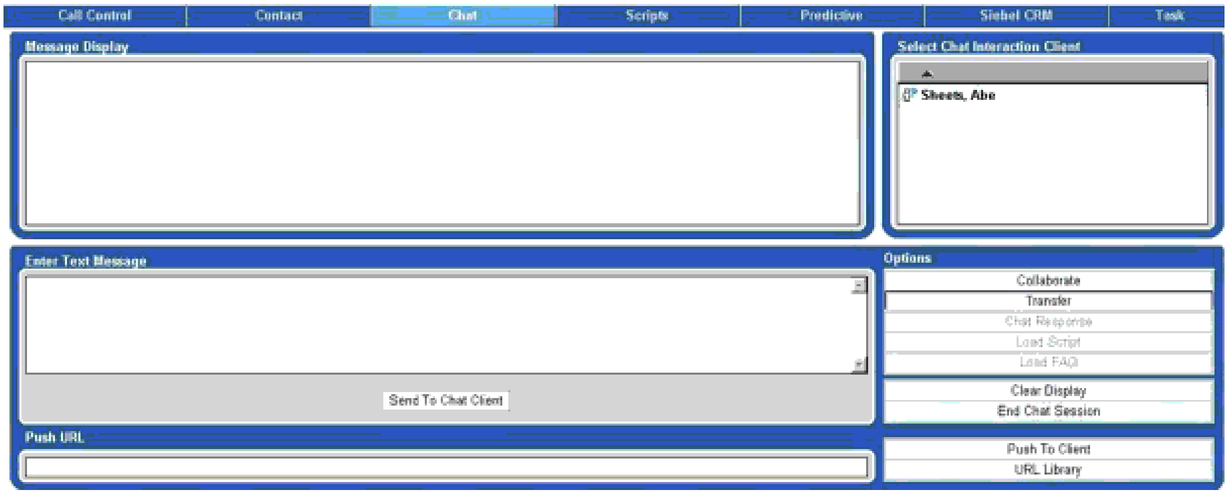


Figure 11. Chat Screen

Scripts Screen

From the Scripts Screen (Figure 12) you can access information previously developed and saved by the contact center Administrator for handling Interactions.

Scripts may contain answers to frequently asked questions, a scripted sales pitch, marketing copy, and so forth.

Contact Center Anywhere automatically displays the appropriate script for the Project with which you are working.

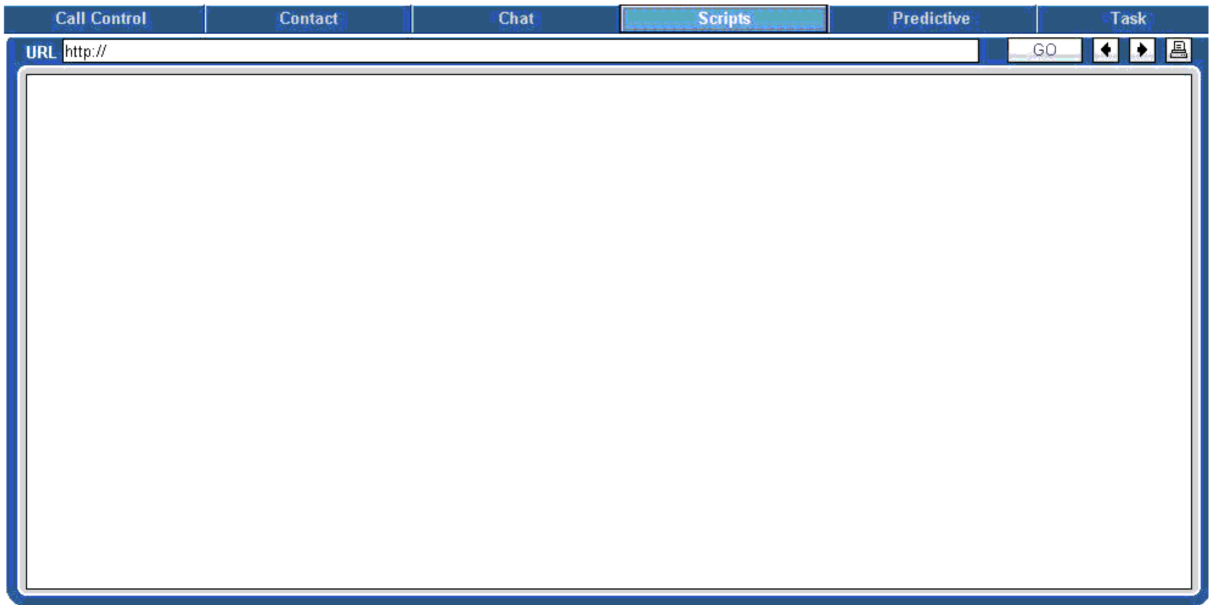


Figure 12. Scripts Screen

Predictive / Preview Screen

When available, use the Predictive Screen (Figure 13) to login to predictive and preview calling projects.

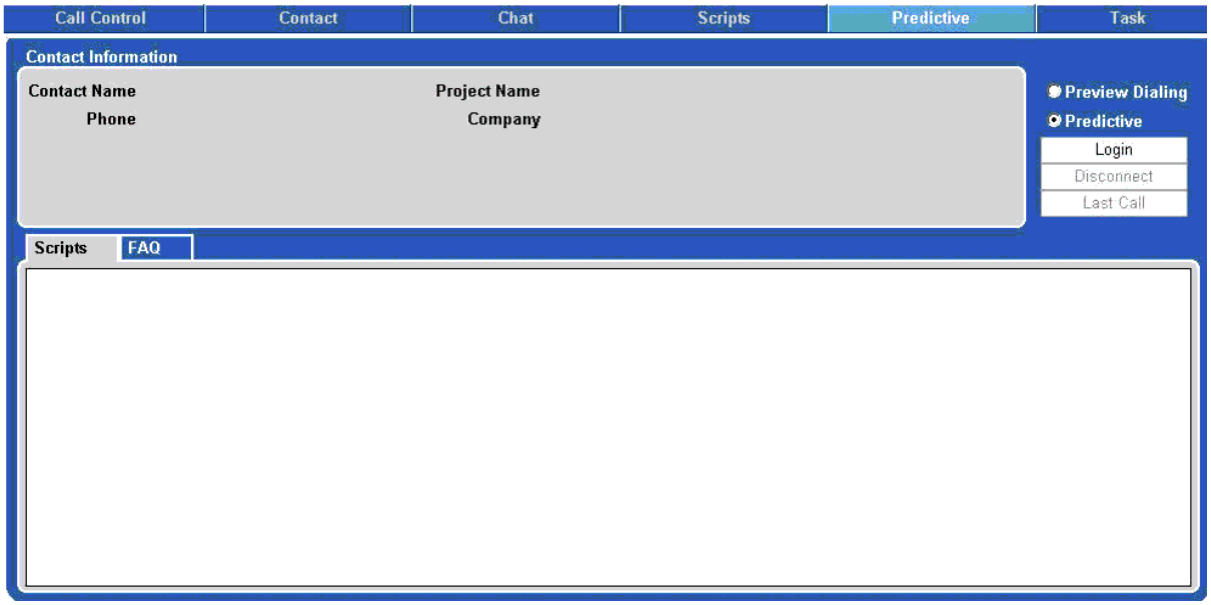


Figure 13. Predictive Screen

While signed on to the predictive project, CCA automatically calls prospective customers and, when they answer, rings your phone. When you accept the predictive call, CCA connects you with the prospective customer and displays the scripts defined for the campaign on your screen.

A CCA preview project lets you control the placement of calls to prospective customers whose name and number appears on the Preview screen.

If you reach the customer, IM provides script and FAQ information for handling the call.

NOTE: The Predictive/Preview screen is available only if your CCA is configured to handle predictive or preview interactions.

Task Screen

CCA has flexible scheduling and task management built into the IM application. Agents can also use the Task Screen (Figure 14) features to dial, email, or fax contacts with a simple mouse-click.

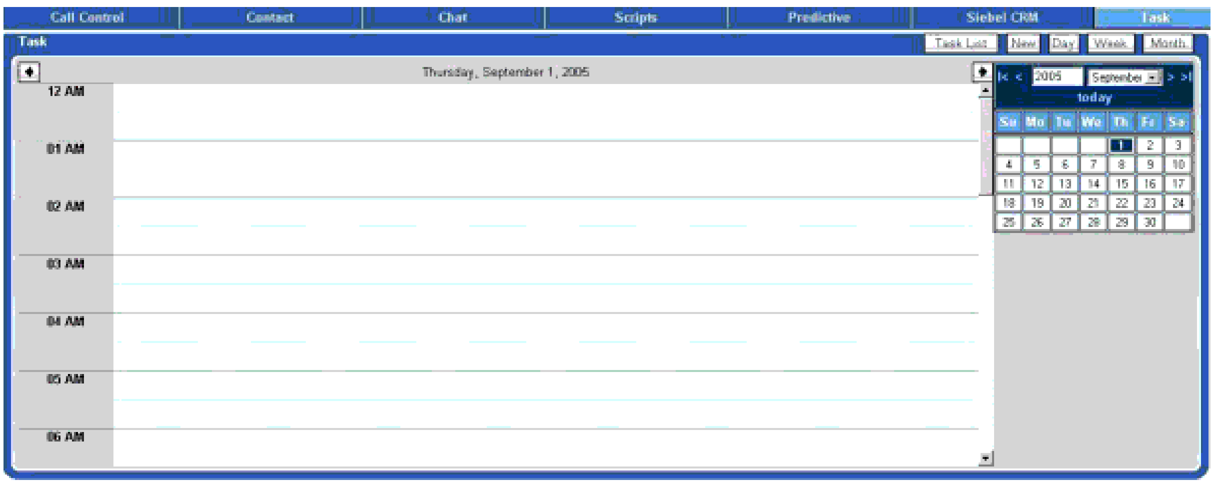


Figure 14. Task Screen

Custom Screen

Your System Administrator can configure an optional custom screen. A custom screen, for example, can let CCA integrate with another CRM application.

3 Getting Started

This chapter describes how to launch, log into, and configure IM. When you finish this chapter, you will be ready to start handling interactions. This chapter includes the following topics:

- Starting and Logging in to Interaction Manager
- Configuring Interaction Manager

Starting and Logging in to Interaction Manager

The first time you use IM, use your browser to open the IM Welcome Screen, much as you would load a typical internet Web site in a browser.

To start and log in to IM

1. Start Internet Explorer version 6.0 or above.

   NOTE: You need Internet Explorer, version 6.0 or above, to launch the application the first time, to access the application's online help, and to push pages.

2 Enter the address for CCA provided by your contact center administrator. The CCA Welcome Screen (Figure 15) appears.

Figure 15. Contact Center Anywhere Welcome Screen

3 Type your company alias, user name, and password in the appropriate text boxes located on the left of the screen.

4 From the drop-down list, choose your language.

5 Click the Interaction Manager icon.

During login, after CCA authenticates your user name and password and displays an initial login message (Figure 16), or the date and time of the last successful login and the number of failed login attempts (Figure 17) since the last successful login appears.

Figure 16. Login Message - First Time You Login

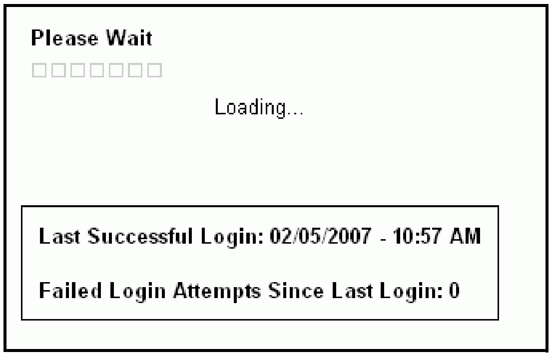


Figure 17. Login Message - After Your First Login

NOTE: After you successfully log into AM, the count for the number of failed attempts resets to zero.

The CCA Interaction Manager Call Control Screen (Figure 18) appears.

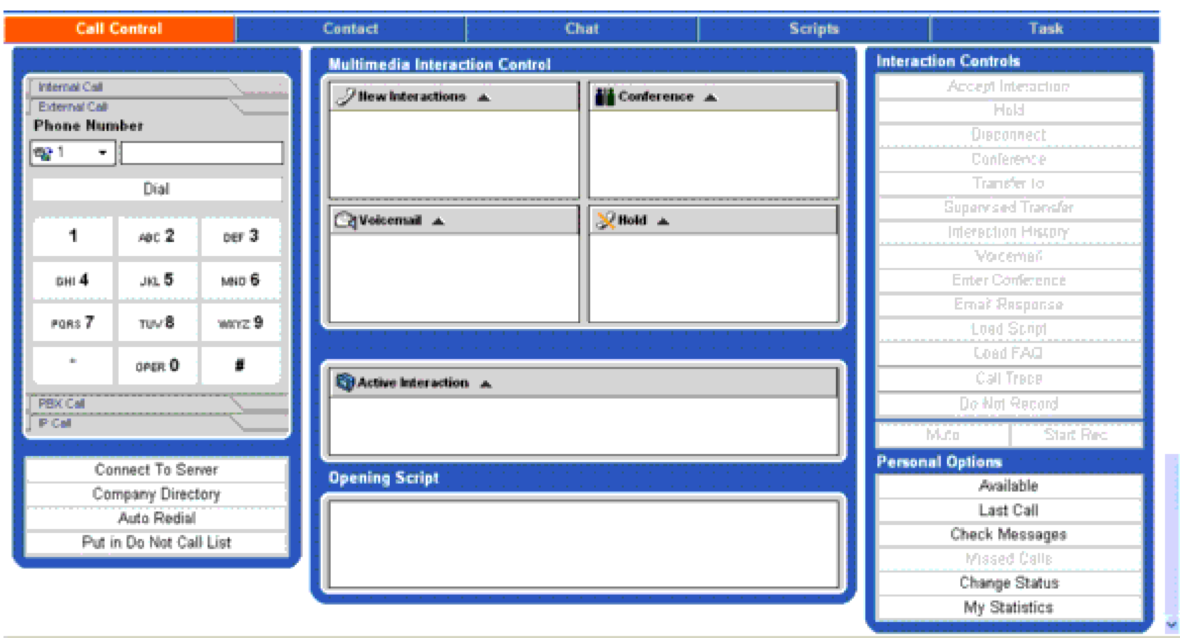


Figure 18. Call Control Screen

NOTE: If the Call Control Screen does not appear, ask your system administrator to confirm that you are using the correct address, company alias, user name, and password.

TIP: Add the CCA Welcome Screen to your browser's Favorites Menu. Then, for subsequent IM sessions, simply load the CCA Welcome Screen by choosing it from the menu.

Login Error Messages

You may see one of the following error messages when you log into CCA:

- Invalid JVM. Please contact your Administrator

  TIP: Refer to "Java Applet Error Messages" on page 30.

- Error loading applet, please contact your Administrator.

  TIP: Refer to "Java Applet Error Messages" on page 30.

- Inactivity Timeout.

  TIP: Refer to "Forced Logout Due to Inactivity" on page 31.

- Account Locked. Contact Your Administrator

  TIP: Refer to "Forced Logout Due to Inactivity" on page 31.

Java Applet Error Messages

To run CCA, you must have Java Applet installed on your PC. An applet is a small Internet-based program written in Java, a programming language for the Web. Applets are designed to run inside a Web browser and to perform some tasks such as animated graphics and interactive tools.

If Java is not installed or if you have the wrong version, a message appears (Figure 19) informing you of the problem and providing instructions for how to solve this problem.

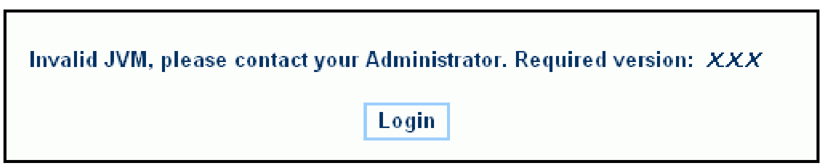


Figure 19. Example Invalid JVM Java Error Message

Or you may see an error message, such as in Figure 20, if the Applet does not load properly.

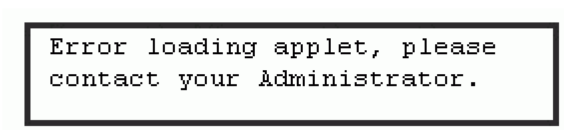


Figure 20. Example Error Loading Applet Message

Forced Logout Due to Inactivity

If configured, CCA may automatically log you out if you have exceeded the maximum inactivity time set by your administrator. If this happens, an message appears (Figure 21).

Figure 21. Inactivity Timeout Message

If you are logged out of CCA due to inactivity, then the next time you attempt to log in, a message will appear (Figure 22) indicating that you are locked out.

Figure 22. Account Locked Message

TIP: Ask your Administrator to reactivate your account.

Configuring Interaction Manager

You can configure the following features of IM to meet your specific needs:

- Identifying How to be Notified (for New Interactions)
- Identifying Phone Options
- Setting Regional Options (Time Zone and Date Formats)
- Identifying Email Options
- Recording Voicemail Prompts

Identifying How to be Notified (for New Interactions)

You can choose a visual notification, audible notification, or both, when you receive a new interaction, from the General tab (Figure 24 on page 32) of the Configuration dialog box.

- Click the **Configuration** link (Figure 23).

Figure 23. Configure Link

The Configuration dialog box opens with the General tab (Figure 24).

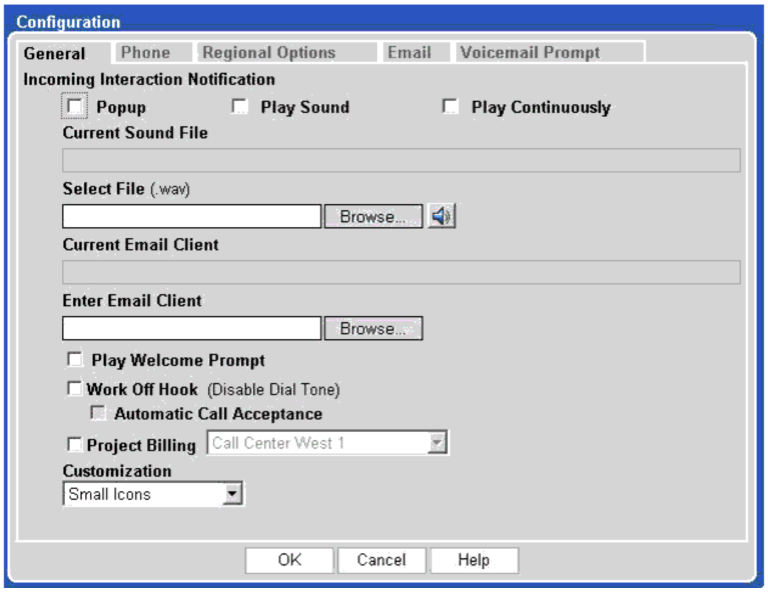


Figure 24. Configuration - General Tab

To set your incoming interaction notification mode

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Choose one or more Incoming Interaction Notification modes from the following:

- Select Popup

  The Call Control screen automatically appears when you receive an interaction. In Windows, the application icon at the bottom of your screen also flashes.

- Select Play Sound, so that CCA will play a sound one time when you receive an interaction, and do one of the following:
  - Under Select File (.wav), enter the name and location (path) of the sound file to use.

  NOTE: To hear a sound, you must upload a .WAV file using the Configuration dialog:

  - Click the Browse button, locate the sound (.wav) file on your computer or network, and click Open.
  - If you want, click the sound icon to hear the sound file and verify that it is the correct file.
  - Click OK.

  NOTE: You can load a sound file anytime. However, for the sound file to play, you *must* check the Play Sound option.

- Select Play Continuously

  CCA plays the sound (.wav) file you loaded in step b (above) repeatedly, until you accept the interaction.

3 Click OK to save your configuration settings.

To set your email program

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Do one of the following:

- In the Enter Email Client text box, type the name and location (path) of the email program to use with IM.
- Click Browse (to find the file on your computer or network) and then click Open.

3 Click Accept to save your configuration settings, and then click OK.

TIP: See "To set your email options" on page 41.

To use a welcome prompt

You can choose to play a Welcome Prompt to the customer before they begin speaking with you. An example of a Welcome Prompt might be, *Hello, my name is John Smith. Please enter your account number*. Welcome prompts are useful in environments where you give the same greeting to each caller.

NOTE: To create a Welcome Prompt, follow the same instructions as creating a voicemail prompt.

TIP: Refer to "Recording Voicemail Prompts" on page 42.

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Select the Play Welcome Prompt check box and then click OK.

To work off-hook

Working off-hook means that, instead of picking up the phone every time an Interaction arrives, all you need to do is click the Accept Interaction button.

1 Click Configure.

   The Configuration dialog box opens with the General tab (Figure 24).

2 Select the Work Off-hook check box and click OK.

   The Call Control Screen (Figure 18) reappears.

3 In the Interaction Manager Call Control tab, click Connect to Server (Figure 25) and wait for the phone to ring.

Connect to Server

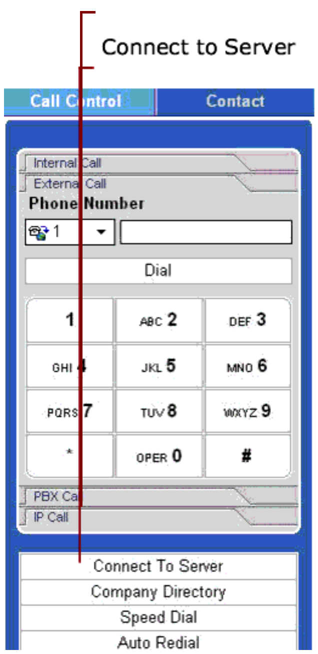


Figure 25. Call Control: Connect to Server

4 Answer your telephone receiver to work off-hook.

Notice that the Connect to Server option changes to Hang up (Figure 26), as a reminder to hang up the phone when you finish accepting all calls.

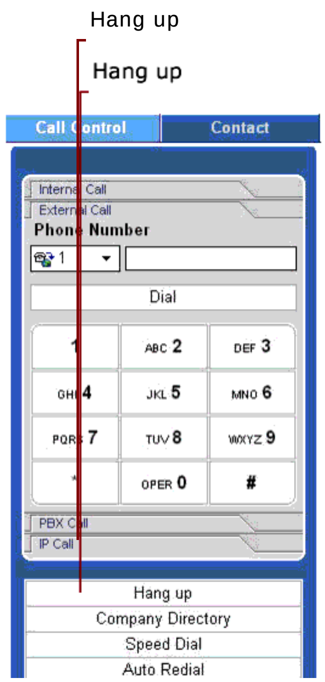


Figure 26. Call Control: Hang Up

NOTE: You must repeat these steps each time you physically hang up the phone.

To use Automatic Call Acceptance

A feature of working off-hook is that you can automatically accept Automatic All Distribution (ACD) calls as soon as they arrive in Interaction Manager. When a call arrives, a tone plays and Contact Center Anywhere connects you to the caller.

1 Click Configure.

The Configuration dialog box (Figure 24) opens with the General tab.

2 Select the Work Off Hook check box.

3 Select the Automatic Call Acceptance check box, and click OK.

NOTE: The Automatic Call Acceptance feature only works with ACD calls. Calls made directly to your phone number (direct inbound and extension to extension) are not accepted automatically.

Selecting a Project For Billing

If your Contact Center is configured to allow agents to make outbound calls, you must select a *Project*. Your outbound calls are billed against the project you select and CCA uses a specific template for that project. Therefore, it is important that you select the correct project.

If you select a different project than the one already assigned to the contact, then one of two things will occur when CCA attempts to locate a matching number for the project you select:

- If CCA cannot find a matching number, then it will not assign the contact to the current interaction.
- If CCA finds a matching number, then it uses the template for that project, which may not match your expectations.

NOTE: If you are not sure which billing Project to use, check with your Supervisor.

To select a project for billing

1 Click Configure.

The Configuration dialog box (Figure 24) opens with the General tab.

2 Select the Project Billing check box.

A list of available Projects opens (Figure 27).

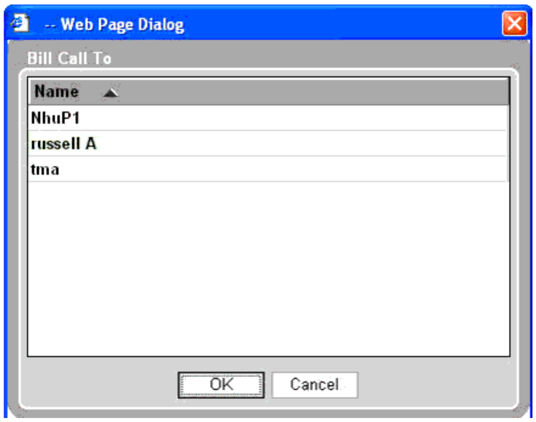


Figure 27. Example Bill To Project List

3 Select a Project from the list and click OK.

Changing the Appearance of Icons

You can change the appearance of icons by making them small without text, small with text, or larger. Figure 28 shows an example of small icons in the Contact tab.

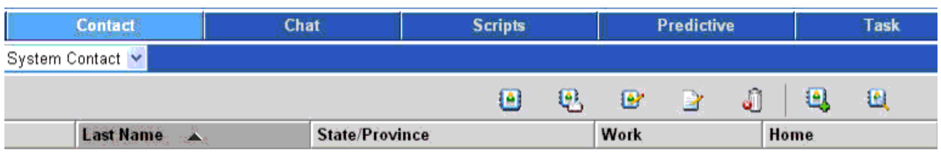


Figure 28. Example Small Icons (Contact Tab)

Figure 29 shows and example of large icons in the Contact tab.

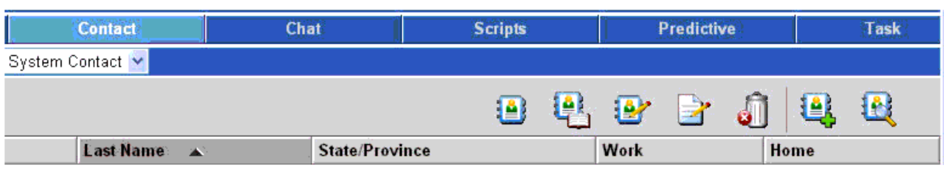


Figure 29. Example Large Icons (Contact Tab)

Figure 30 shows an example of small icons with text in the Contact tab.

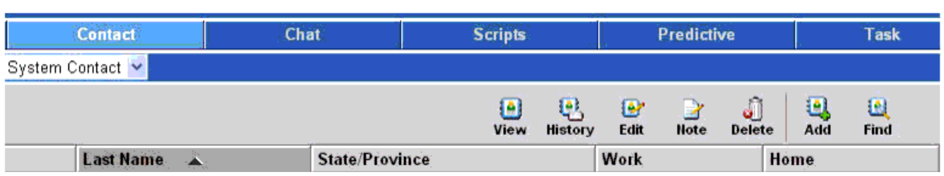


Figure 30. Example Small Icons With Text (Contact Tab)

To change the appearance of icons

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 From the Customization list box, select Small Icons, Large Icons, or Small Icons with Text.

3 Click OK.

Identifying Phone Options

You can access the contact center from a variety of locations. To receive calls at your present location, select the type of system your company uses to route calls and then enter your personal extension on that system.

If you work from multiple locations, configure IM so that CCA knows to route interactions to your present location. For example, if you access the contact center from both your home and your office location, configure IM *each time* you change locations.

To set your phone extension

1. Click Configure.

   The Configuration dialog box (Figure 24) opens with the General tab.

2. Click the Phone tab (Figure 31).

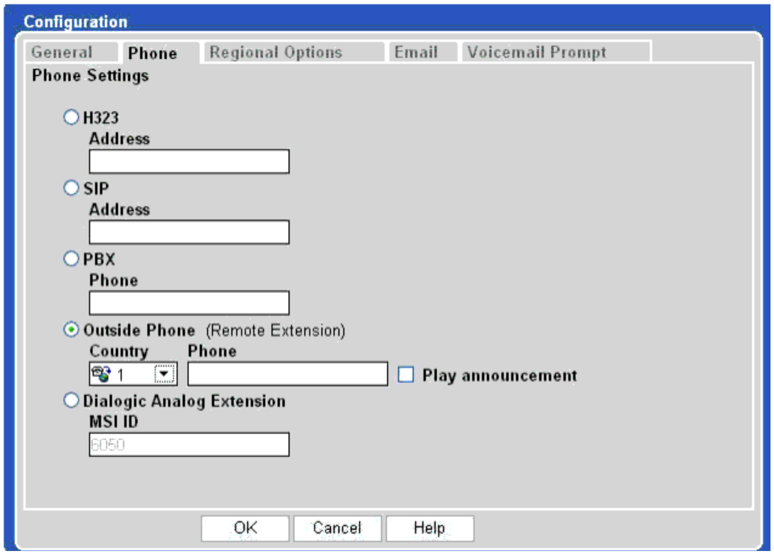


Figure 31. Configuration: Phone Tab - Phone Type

3. Choose your phone type from the following: (If you are not sure which type you are using, ask your contact center Administrator.)

   - If you choose H323, type the IP address in the corresponding address box.
   - If you choose SIP, type the IP address in the corresponding address box.
   - If you chose PBX, type your extension number in the corresponding phone box.
   - If you work remotely, for example, if you work at home or at a site that is different from the contact center:
     - Click Outside Phone (Figure 32).
     - Then, select your Country Code and enter your phone number.

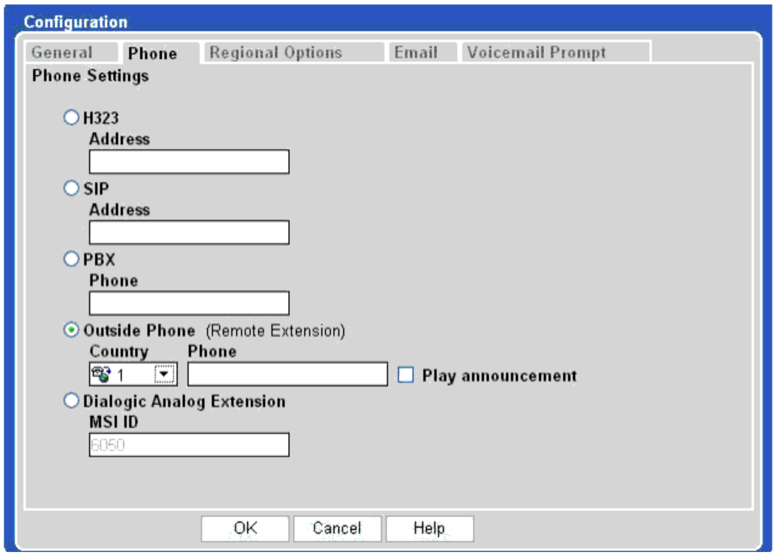


Figure 32. Configuration: Phone Tab - Remote

TIP: If you select the Outside Phone radio button, you can also select the *Play Announcement* check box. When selected, the system plays a recorded message telling you there is a phone interaction waiting to be connected and provides the option of *accepting* or *declining* the phone Interaction.

- If you chose Dialogic Analog Extension, supply your MSI Identification number in the MSI ID box (Figure 32).

4 Click OK to save your configuration settings.

To set an outside phone number

If you plan to travel from one workstation to another, then before you leave:

1 From the Call Control Screen (under Personal Options), click the Last Call button (Figure 33).

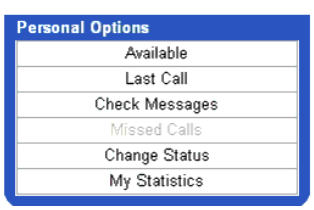


Figure 33. Call Control: Last Call Button

2 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

3 Click the Phone tab (Figure 31) and check Outside Phone.

4 Select the Country (from the drop-down list) and enter the phone number that you will use at the other location.

5 Click OK and log out of Interaction Manager.

When you login at the other location, you will be ready to receive interactions.

Setting Regional Options (Time Zone and Date Formats)

You can set the time zone and date format for your IM workstation. If you work in a different time zone than most of your customers, or different than your company headquarters, you can configure your settings to match their time zone and date format.

To set your time zone and date format

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Select the Regional Options tab (Figure 34).

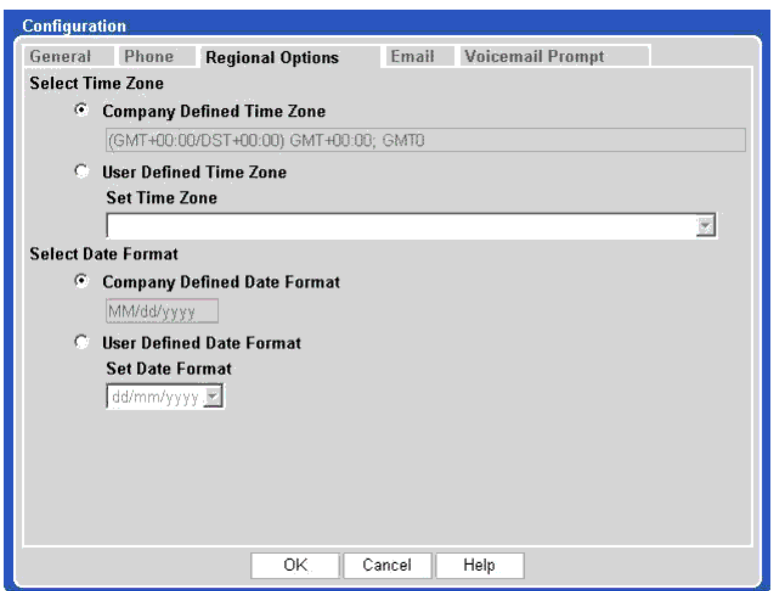


Figure 34. Configuration: Regional Options Tab

3 To set your time zone to the same time zone defined for your company, choose Company Defined Time Zone.

NOTE: To set a different time zone, click User Defined Time Zone and then choose a time zone from the Set Time Zone drop-down list.

4 To set the date format, do one of the following:

- select the Company Defined Date Format
- Select User Defined Date Format and then select a date format from the drop-down list.

5 Click OK to save your configuration settings.

All IM screens now display times and dates in the time zone and format you selected.

Identifying Email Options

To receive mail, you must have the following:

- A server on your network that distributes mail (the POP3 server).
- An account on that mail server with your user name and password.

In most cases, your administrators sets up your mail account and you will never need to change anything. However, if your contact center requires you to change your POP3 login information, the following sections describe how.

To set your email options

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Select the Email tab (Figure 35).

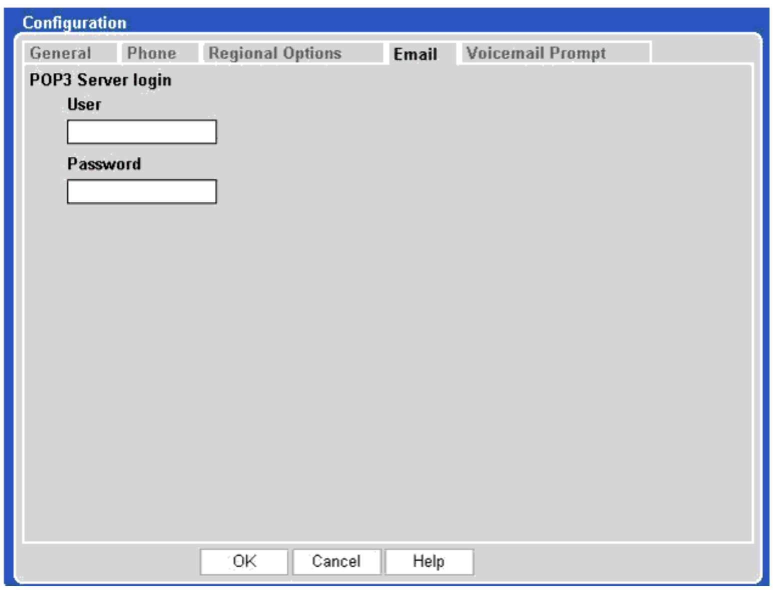


Figure 35. Configuration: Email Tab

3 Edit the User and Password fields. You can enter the new POP3 login information at any time. If you are not sure what to enter, contact your supervisor or administrator.

NOTE: If you click in the *User* and *Password* fields but you cannot edit the fields, it means that your administrator has not yet entered your ***initial*** POP3 information in the Administration Manager program. Contact your administrator for more information.

Recording Voicemail Prompts

You can personalize the recorded message that a customer hears just before you answer the phone and before they leave a voicemail message.

Use your phone to record these messages or use existing messages. (Existing messages must be created in a specific format. See “Understanding the Pre-Recorded Prompt Format” on page -43.)

to record prompts with your phone

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Click the Voicemail Prompt tab, which opens with the Record Prompts tab (Figure 36).

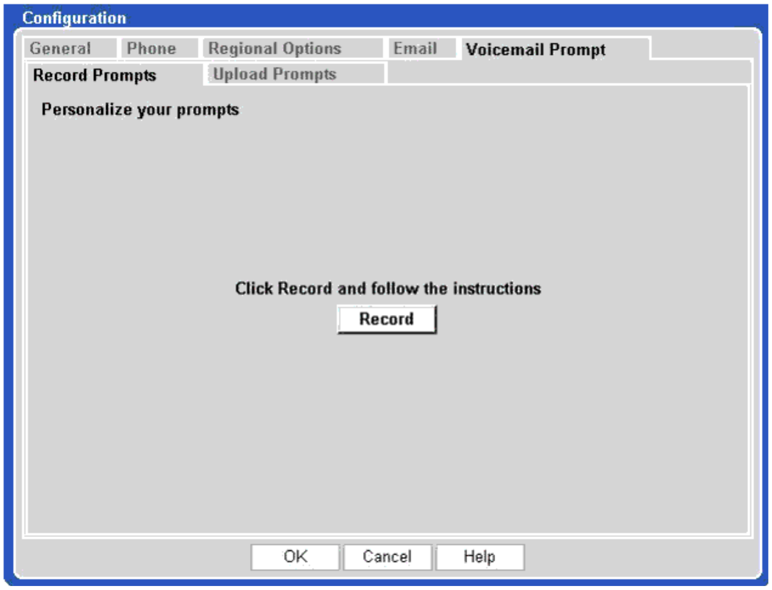


Figure 36. Configuration: Voicemail Prompt - Record Prompts

3 Click the Record button.

The Record Voicemail Instructions screen (Figure 37) opens.

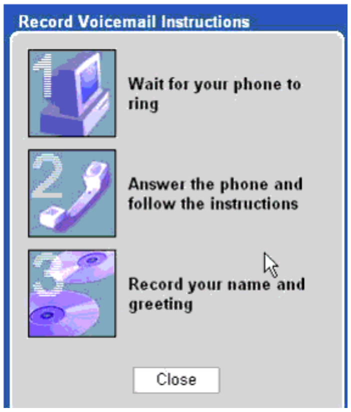


Figure 37. Record Voicemail Instructions

4 When your phone rings, pick it up, and follow the instructions you hear over your telephone hand set.

5 When you finish recording your message, press the star button on the phone or hang up.

6 Click Close, and then click OK.

Understanding the Pre-Recorded Prompt Format

Before you can select a pre-recorded message, you must first create one.

TIP: Refer to "to record prompts with your phone" on page 42.

You can have up to three different recorded greetings:

- One recording states your name (such as *Jane Smith*).
- One recording instructs the customer to leave a message for you.

  For example, *I'm sorry I'm not available to take your call. Please leave a message and I will return your call as soon as possible.*
- One recording greets the customer when they are routed to you.

  For example, *This is Jane Smith. How may I help you today?*

To ensure compatibility with CCA, your recordings are automatically saved in files with the following characteristics:

Format:	Windows PCM
Compression:	uLaw
Sampling Rate:	8,000 Khz (800 Mhz)
Resolution:	8 bits

To use (upload) your pre-recorded prompts

1 Click Configure.

The Configuration dialog box opens with the General tab (Figure 24).

2 Click the Voicemail Prompt tab and then the Upload Prompts tab (Figure 38).

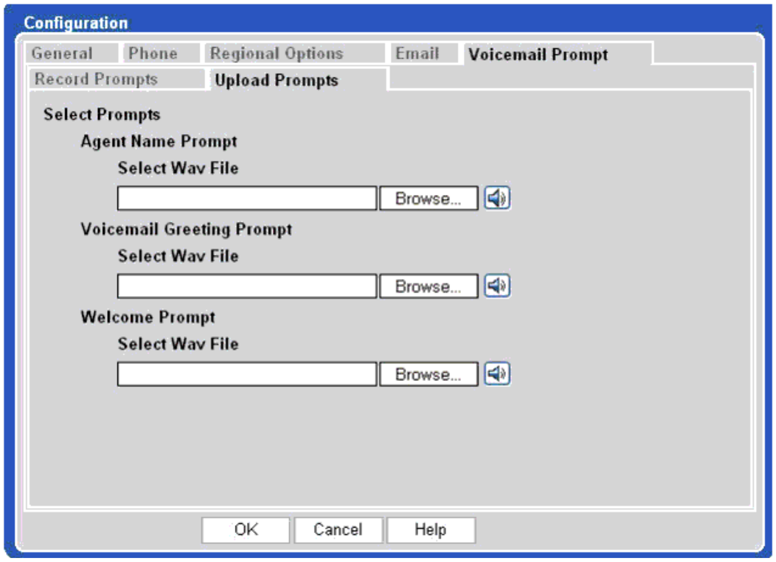


Figure 38. Configuration: Voicemail Prompt - Upload Prompts

3 Under Agent Name Prompt:

a To select a sound (.wav) file, click the Browse button and select the pre-recorded prompt containing your name.

b Click the sound icon to listen to the recording to verify that it is correct.

4 Under Voicemail Greeting Prompt:

a To select a sound (.wav) file, click the Browse button and select the pre-recorded prompt that instructs the customer to leave you a message.

b Click the sound icon to listen to the recording to verify that it is correct.

5 Under Welcome Prompt:

a To select a sound (.wav) file, click the Browse button and select the pre-recorded prompt that greets the customer before you answer the phone.

b Click the sound icon to listen to the recording to verify that it is correct.

6 Click OK.

4 Making and Billing Calls

This chapter describes how to make and bill calls using the Call Control Dialer. It includes the following topics:

- Understanding the Dialer
- Making Internal Calls
- Making External Calls
- Making PBX Calls
- Making IP Calls
- Redialing a Number
- Using the Company Directory
- Handling Multiple Interactions

Understanding the Dialer

Use IM to dial numbers directly through the Call Control Dialer (Figure 39).

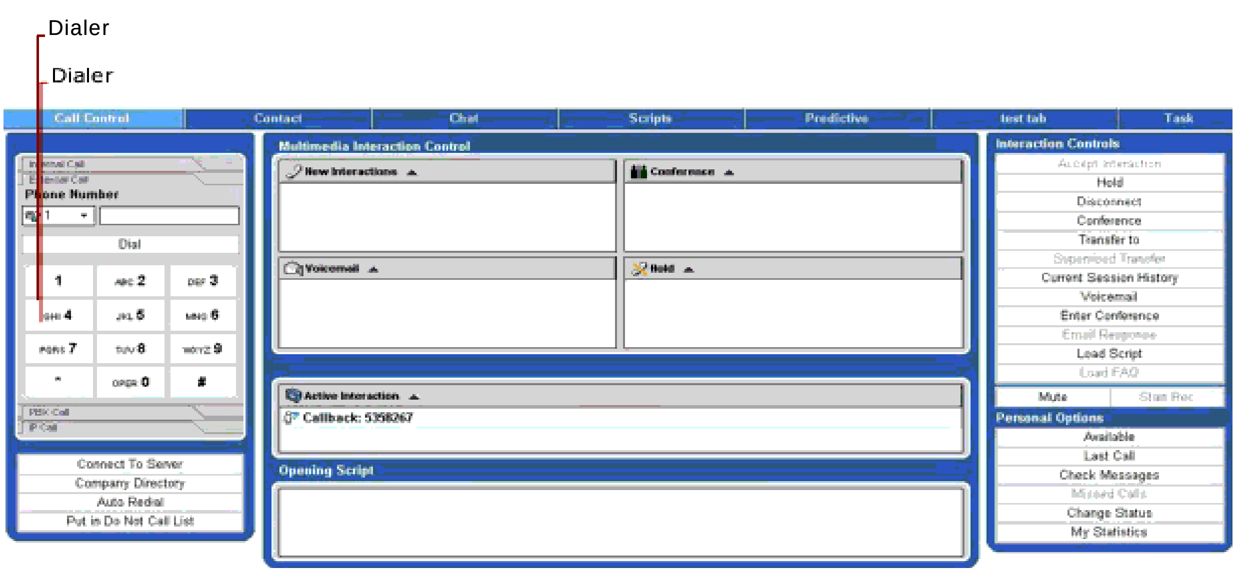


Figure 39. Call Control Dialer

You can perform:

- Making Internal Calls (calls to company extensions)
- Making External Calls (calls to phone numbers outside your company)
- Making PBX Calls (calls to a private branch exchange)
- Making IP Calls (VOIP calls to softphones running on someone's computer)
- Calls Using the Company Directory (to anyone in your Company Directory, even if you do not know their extension number)

Making Internal Calls

To call a person in your company using the Dialer's Internal Call tab, you must know the person's phone extension.

TIP: If you do not know their extension, refer to "Using the Company Directory" on page 53.

To make an internal call

1 From the Call Control Screen, select the Internal Call tab (Figure 40) on the left.

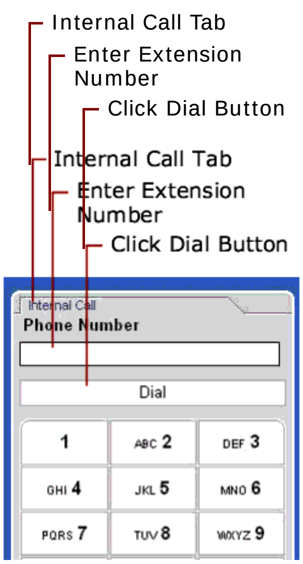


Figure 40. Dialer: Internal Call Tab

2 Type the extension number to call in the Phone Number box or click the extension numbers on the Dial pad.

3 Click the Dial button.

The ringing telephone status icon appears and your telephone rings.

NOTE: If you are set to automatically accept interactions, your phone will not ring. The call automatically becomes the *active* interaction.

When you answer your handset, CCA dials the call. The status icon now displays a phone off-hook, your status changes from *Available* to *Busy*, and the person you are calling appears in the New Interactions box (Figure 41).

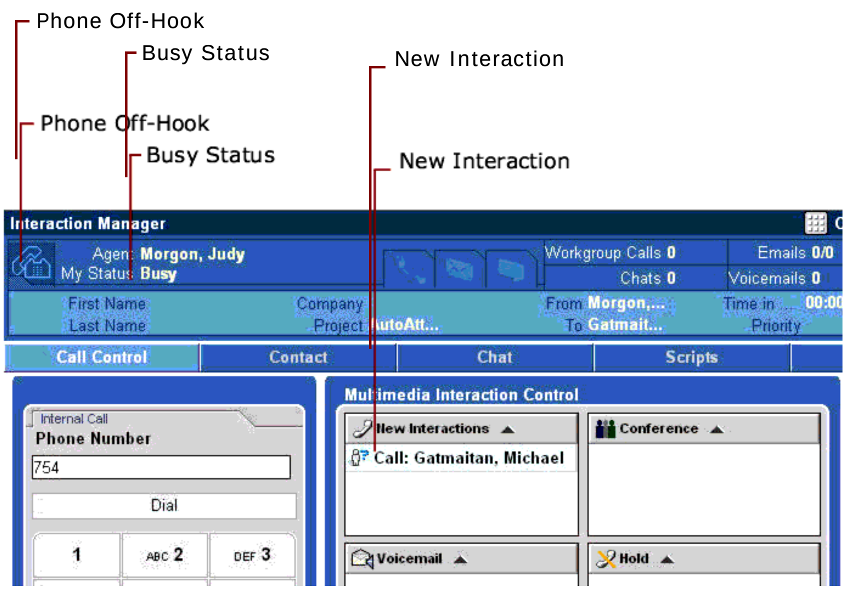


Figure 41. New Interaction (Internal Call)

4 When the phone is picked up (or when voicemail begins), the call moves to the Active Interaction area (Figure 42).

Active Interaction

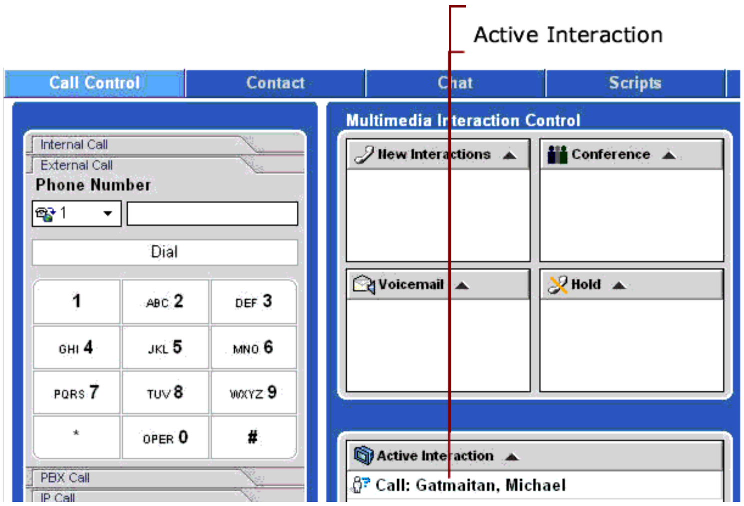


Figure 42. Active Interaction (Internal Call)

TIP: For information about the tools CCA provides for managing telephone interactions, refer to Chapter 5, “Handling Phone Interactions.”

Making External Calls

If you have user privileges, you can make a call outside your contact center.

To make an external call

1. On the Dialer, select the External Call tab, select a country from the drop-down list, and type the phone number in the box (Figure 43), or click the numbers on the Dial pad.

   NOTE: The default country code is 1 for the United States and Canada.

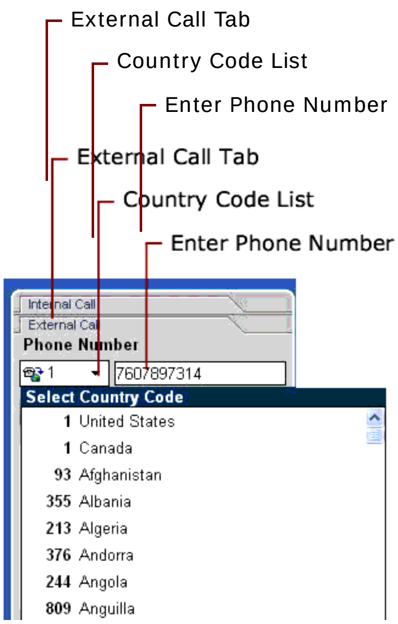


Figure 43. Dialer: External Call Tab

2. Click the Dial button.

   If the call must be billed to a Project, a list of Projects appears (Figure 44).

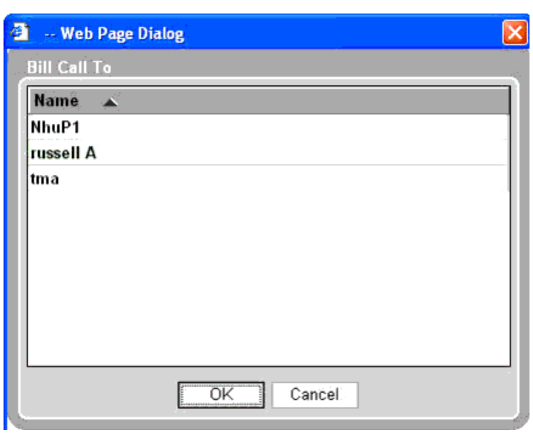


Figure 44. Example Bill To Project List

a Select a Project for billing from the list.

TIP: To automatically bill all future calls to this Project, check **Use this project for all calls**, if available.

b Click **OK**. CCA rings your extension. (Notice that the status icon changes to a ringing telephone.)

NOTE: If you set your Interaction Manager to automatically accept interactions, your phone will not ring. The call automatically becomes the *active* interaction.

3 Answer your extension and begin speaking.

NOTE: Notice that the phone handset icon appears, your status changes to *Busy* and the number you dialed appears in the Active Interaction area (Figure 45).

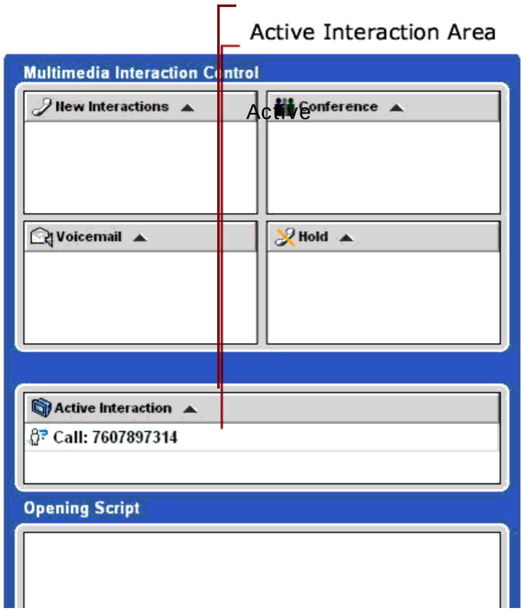


Figure 45. The Call Control Screen: Active Interaction Area

Making PBX Calls

If you have user privileges, you can make a PBX (Private Branch Exchange) call.

To make a PBX call

1 On the Dialer, select the PBX Call tab (Figure 46).

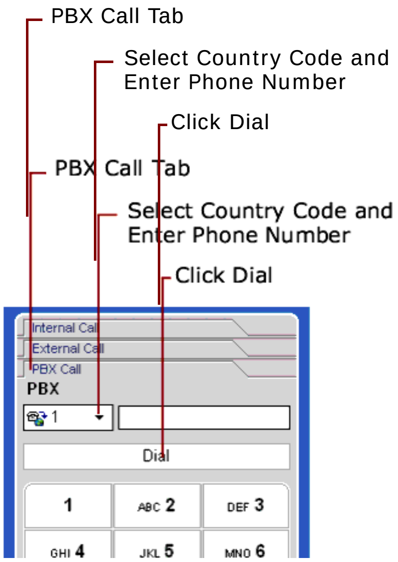


Figure 46. Dialer: PBX Call Tab

2 Select a Country Code from the drop down list (Figure 46) and type the number to call in the adjacent box.

NOTE: The default country code is 1 for the United States and Canada.

3 Click the Dial button.

4 Because the call must be billed to a project, associate the call to a specific project and then select a project for billing.

TIP: To automatically bill all future calls to this Project, check **Use this project for all calls**.

5 Click **OK**.

CCA rings your extension.

NOTE: If you are set to automatically accept interactions, your phone will not ring. The call automatically becomes the *active* interaction.

6 Answer your extension and begin speaking.

NOTE: The number you dialed appears in the Active Interaction area (Figure 45 on page 50).

Making IP Calls

If you have user privileges, you can call a softphone that is installed on someone's computer.

To make an IP call

1 On the Dialer, select the IP Call tab (Figure 47).

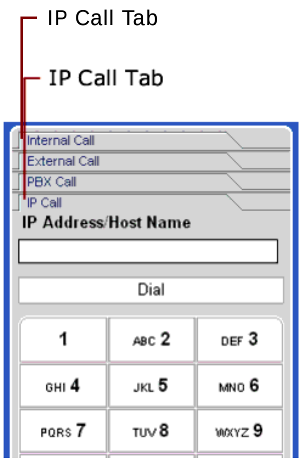


Figure 47. Dialer: IP Call Tab

2 Enter the IP address or the server name of the person to call, and click Dial.

NOTE: To dial an H323 number, just enter the IP address. To dial a SIP number, use this format: sip:<*IP Address*>.

3 Since the call must be billed to a project, associate the call to a specific project and then select a project for billing.

TIP: To automatically bill all future calls to this Project, check **Use this project for all calls**.

4 Click **OK**.

CCA rings your extension.

NOTE: If you are set to automatically accept interactions, your phone will not ring. The call automatically becomes the *active* interaction.

5 Answer your extension and begin speaking.

NOTE: The number you dialed appears in the Active Interaction area (Figure 45 on page 50).

Redialing a Number

No matter what kind of call you make (Internal, External, PBX, or IP), you can redial the last number by clicking the Auto Redial button.

The last number you dialed appears in the Active Interaction area (Figure 45 on page 50) as when connection completes.

Using the Company Directory

You can call anyone in your Company Directory, even if you do not know their extension.

To use the company directory when working remotely

When you are working from a location different than the contact center:

1. In Call Control, click the Connect to Server button (Figure 48).

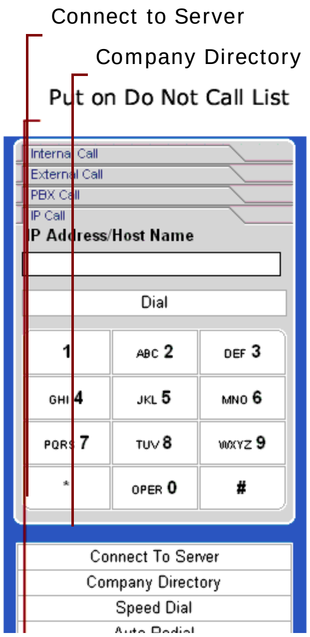


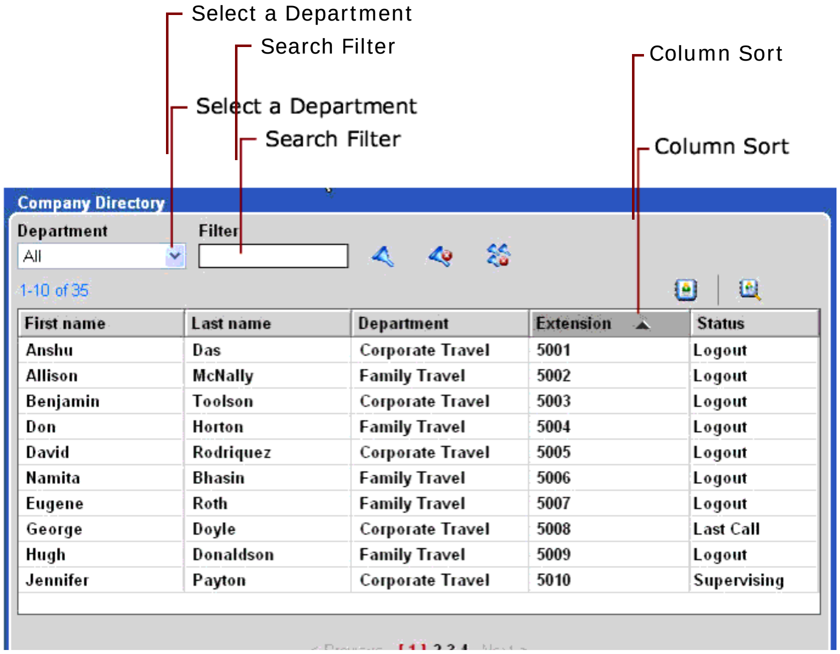
Figure 48. Call Control: Connect To Server Button

2. When your phone rings, answer your hand set.
3. Click the Company Directory button (Figure 48).

To use the company directory when working locally

When you are working at the contact center:

1 Click the Company Directory button. The Company Directory screen (Figure 49) opens.



First name	Last name	Department	Extension	Status
Anshu	Das	Corporate Travel	5001	Logout
Allison	McNally	Family Travel	5002	Logout
Benjamin	Toolson	Corporate Travel	5003	Logout
Don	Horton	Family Travel	5004	Logout
David	Rodriquez	Corporate Travel	5005	Logout
Namita	Bhasin	Family Travel	5006	Logout
Eugene	Roth	Family Travel	5007	Logout
George	Doyle	Corporate Travel	5008	Last Call
Hugh	Donaldson	Family Travel	5009	Logout
Jennifer	Payton	Corporate Travel	5010	Supervising

Figure 49. Company Directory

2 Use the Company Directory dialog box to find the person that you want to call. You can sort through the different contents by selecting the column header. For example, it sorts a to z the first time you select it and then z to a the next time.

- You can view people in all departments or a single department by using the Department list box.
- To quickly see a list of everyone in the company, click the Find Contact icon. In the Find Contact form, click the Find button without entering information.
- To search for anyone in your company, click the Find Contact icon. In the Find Contact form, enter information about the person (such as first name, last name, or phone number) and then click the Find button.
- To view a smaller list of people:

  Example #1: To view only people whose last name begins with the letter ‘A’:

  - Click the Last Name column.
  - Type A* in the Filter text box.
  - Press the Return (or Enter) key on your keyboard.

  Example #2: To see only people in the company whose phone extension ends with the number “45”:

- Click on the Extension column.
- Type ***45** in the Filter text box.
- Press the **Return** (or Enter) key on your keyboard.

3 After you find the person to call, double-click on the person's name from the Directory List.

4 Select a project for billing, and click OK.

TIP: Check **Use this project for all calls** to automatically bill all future calls to the same project.

CCA rings your extension.

NOTE: Notice that the *Connect To Server* button changes to *Hang Up* as the number dials.

To use the company directory to view someone's contact record

1 Click the Company Directory button and select the person's name from the Company Directory list.

2 Click the View Contact icon.

Contact information appears in a new window (Figure 50).

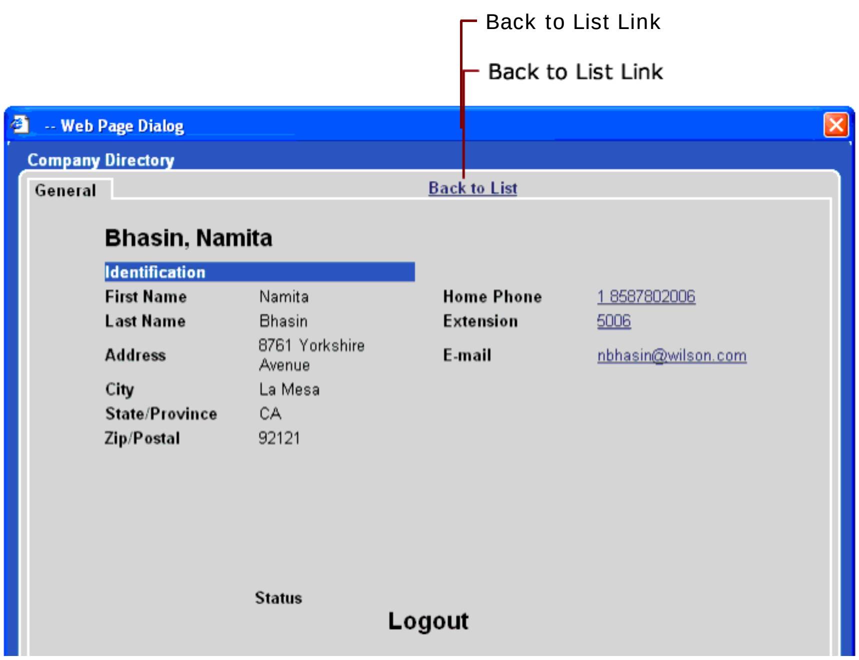


Figure 50. Contact Information

3 Click the Back to List link to return to the Company Directory list.

Handling Multiple Interactions

Most of the time, you will probably handle only one interaction at a time. However, if you need to, you can accept multiple Interactions, such as an email and a phone call but you ***must*** remember to reset your status to *Available* before CCA will offer you a new interaction.

For example:

- When CCA offers you an email, accept as normal.

  TIP: Refer to "If you do not accept a new email interaction within five minutes, CCA sets your status to No Answer and places the interaction back into the queue for the next available agent." on page 85.

  CAUTION: Notice that when a new phone interaction arrives, it appears in the banner but CCA will not present it to you as long as your status is *Busy*. Your status must be *Available* before CCA will present the new interaction to you.

- To make yourself available to accept a phone interaction, click the *Available* button (Figure 51).

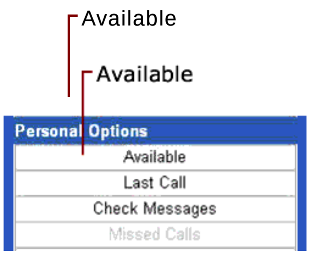


Figure 51. Available Button (Personal Options)

Your status changes to *Available* and CCA presents the new interaction.

5 Handling Phone Interactions

This chapter describes how to manage phone interactions. It includes the following topics:

Understanding Phone Call Types

You can make and receive two basic types of phone calls using IM:

- **Auto Call Distribution (ACD) Calls.** A caller dials a number associated with your contact center and CCA eventually routes the call to you. ACD calls include:
  - A customer who calls in to the contact center and is routed to your phone.
  - Web callbacks and ACD callbacks.

- **Non-ACD Calls.** A caller makes a direct call to your phone number. Non-ACD calls include:
  - Direct inbound calls (calls that come from outside the company directly to your phone).
  - Direct outbound calls (calls that you make to numbers outside the company).
  - Inbound and outbound extension calls (calls that you make to, or receive from, other extensions at your company).

Accepting a New Phone Interaction

When you receive a new phone interaction, IM displays the caller's phone number, if available, in the New Interactions area (Figure 52).

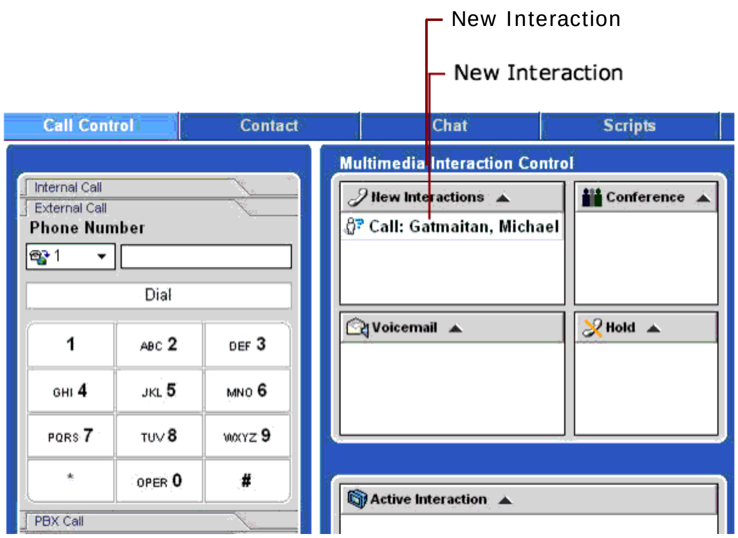


Figure 52. New Interactions

If you do not accept a phone Interaction before the time limit, CCA changes your Status to *No Answer* and puts the Interaction back into the queue for handling by the next *available* agent.

NOTE: ***Call time limits***: The number of rings set by your administrator for phone interactions or one minute for ACD callback and Web callback interactions.

To accept a phone Interaction

1 Answer your phone and begin speaking.

Interaction Manager removes the caller's number from the New Interactions area and displays available information about the caller in the Active Interaction area (Figure 53).

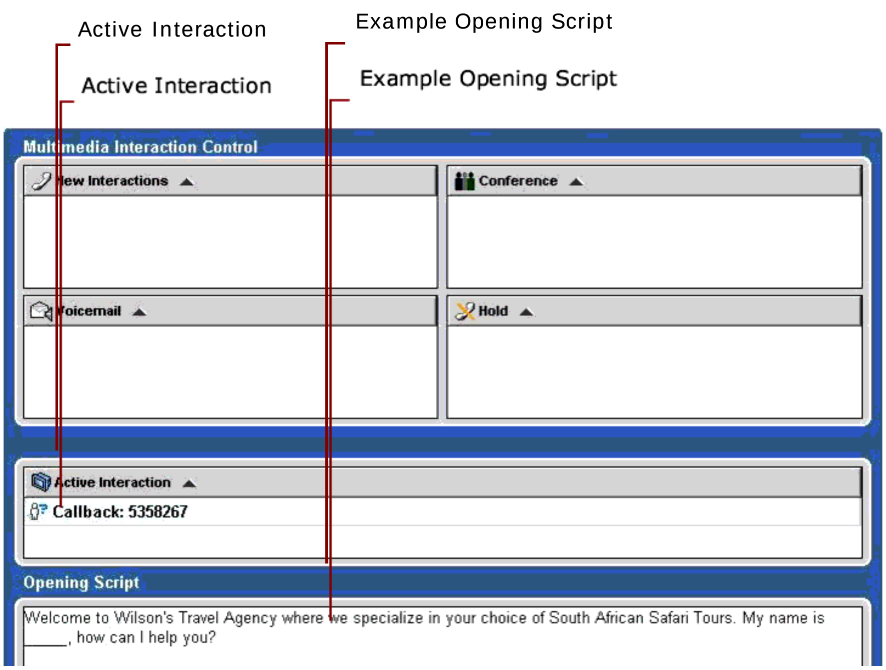


Figure 53. An Incoming Phone Interaction - Answered

2 Do one of the following:

- Read the text in the Opening Script area (if your administrator has provided an Opening Script for your project).
- From the Interaction Controls area, click Load Script or Load FAQ to display the Scripts screen containing the text provided by your administrator for your project.
- If this is a new customer Interaction, click Contact (from the Interaction Bar) to display the Contact Screen, where you can create and assign a contact record to this customer.

TIP: To create a new contact, refer to "To create a new contact record" on page 99.

TIP: To assign contacts, refer to "How Are Contacts Assigned?" on page 107.

Accepting Multiple Phone Interactions

Most of the time, you will probably handle only one call at a time. However, if you need to, you can accept multiple phone interactions.

To accept multiple phone interactions

1. When CCA offers you the first call, accept it by picking up your phone or by clicking Accept Interaction (Figure 54).

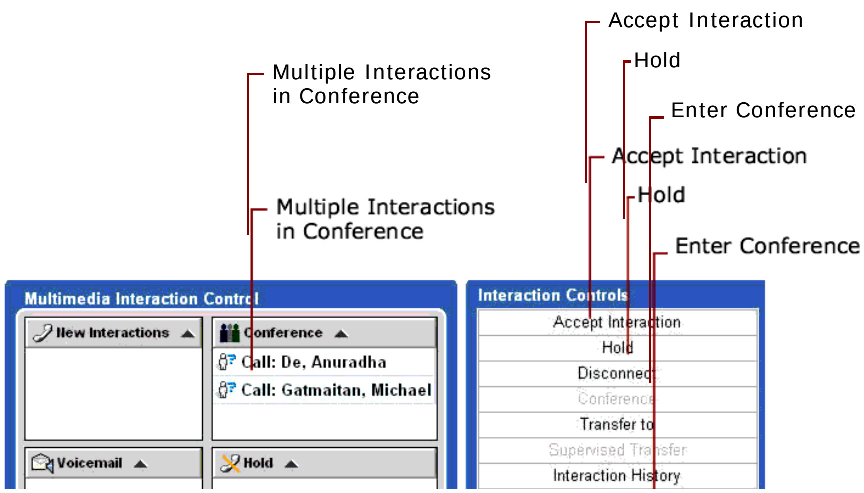


Figure 54. Multiple Interactions in Conference

2. Park the first call by putting it on Hold or in Conference, and then do one of the following:.
   - Select the call in the Active Interaction Area and then click Hold or Conference.
   - Select the call in the Active Interaction area and drag it to the Hold or Conference areas.
3. Click Available (Figure 55).

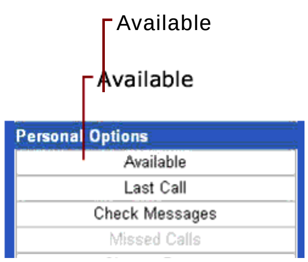


Figure 55. Available Button (Personal Options)

Your status changes to Available.

If another customer is waiting to speak to an agent, CCA offers the call to you.

4. Click Accept Interaction to accept the second call.

Repeat Step 2 to accept as many phone calls as you want. For example, you can place all callers in Conference to give them the same information at the same time.

Using the Optional Hook Flash Feature

Hook Flash is a button on a telephone that simulates a quick off-hook/on-hook/off-hook cycle. Usually the functional equivalent of quickly hanging up and lifting the receiver on an old style phone. Most modern telephones implement this as a button.

If your system is configured to use the Hook Flash feature, then you can do the following, as long as you have a MSI or HDSI phone:

- Make an extension call
- Make an outbound call.
- Retrieve voicemails.
- Place a call on hold.
- Place a call in conference.
- Transfer a call.

When you answer the phone to make a call, a menu plays. The menu tells you the following:

> *You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voicemail, press the asterisk (*) key.*

NOTE: When you dial out, you must include the area code after pressing 9.

When using Hook Flash, click the Flash button on the phone or hang up the phone for a second.

- If you press the Flash button during a call, the person on the line is placed on Hold and the standard Hook Flash menu plays:

  You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voicemail, press the asterisk (*) key.

- If you press the Flash button while connected to two people, the following menu plays:

  Press 1 to connect the first held party. Press 2 to connect the second held party. Press 3 to conference the parties on hold. Press 4 to transfer connect the parties on hold"

Managing Callback Requests

If a customer cannot reach an agent, they can ask the system to have an agent call them back. When an agent becomes available, CCA will automatically call the customer and connect the agent. These types of calls are referred to as Callback Requests or Callback Interactions.

Customer Callback Request From Web Form

When a customer completes the information on your contact center's request Web page (Figure 56), they can specify a time they would like an agent to call them and a phone number to call.

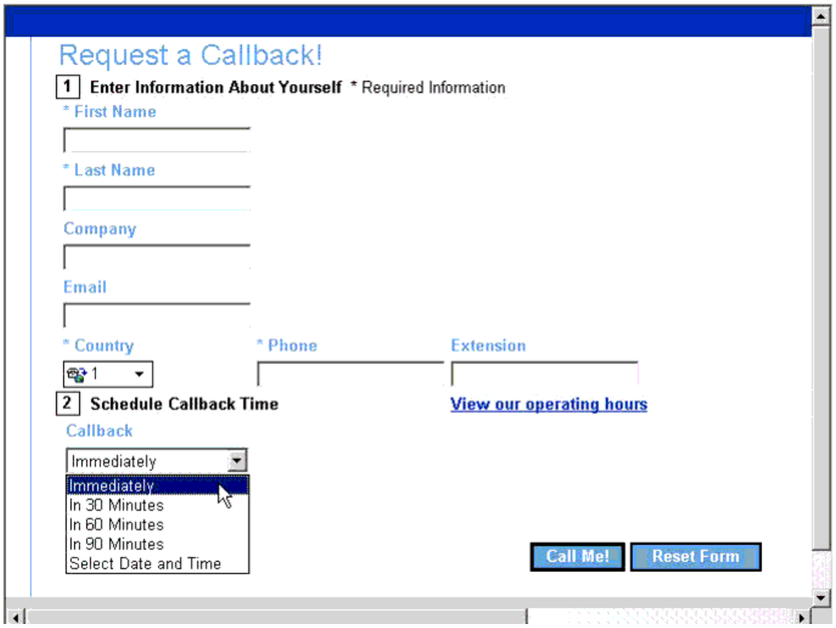


Figure 56. Sample Web Callback Request Page

NOTE: Your administrator must create the request Web page.

Customer Callback Request from a Touch-Tone Menu

When the customer is waiting in a queue, they can select an option from the menu (an ACD Callback Request). The customer provides a phone number where they can be reached.

NOTE: When a customer asks for a callback using a touch-tone menu, they can only ask to be called back as soon as an agent is available, instead of specifying a time, as on the Web page.

When an agent becomes available, CCA offers the agent the callback interaction. If the agent accepts the interaction, the system dials the customer's number. If the customer answers, the agent handles it like any other phone interaction. If the customer does not answer, the agent can reschedule the callback for another time.

NOTE: Callback interactions have the same priority as new phone interactions.

Displaying Callback Request Information

When CCA offers you a callback interaction, Web Callback or Callback appears in the New Interactions area (Figure 57).

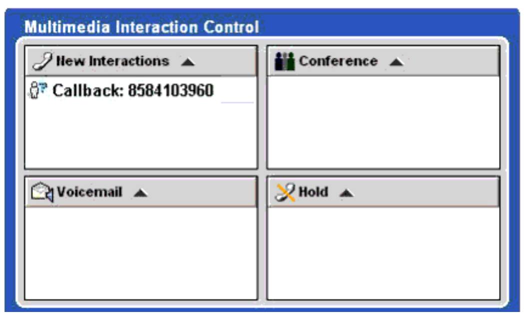


Figure 57. Web Callback - New Interaction

IM displays all the information it has about the callback request in the main Banner area and in the Detailed Information area (Figure 58).

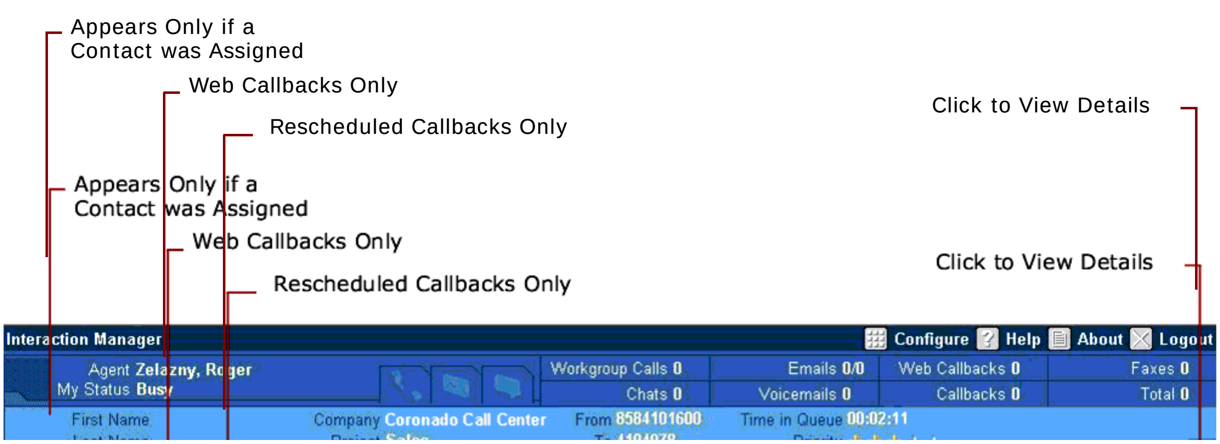


Figure 58. Web Callback - Detailed Information

- If a contact was assigned, then the customer's first name and last name appears in the main banner area.

TIP: See Chapter 10, "Managing Contacts."

- If the interaction is a Web callback, ***and*** the customer filled out the fields of the Web callback form, then that information appears in the Detailed Information area.
- If the interaction is a re-scheduled callback request, then:
  - The time that the customer requested the callback is appears under Requested Time.
  - The time that CCA scheduled the callback appears under Scheduled Time.

Accepting a Callback Request

You can accept a callback request or reschedule the callback to a different date and time.

To accept a callback request

1. Click Accept Interaction (or select the callback request and drag it to the Active Interaction area).

   CCA automatically dials the number provided by the customer.

2. Wait for your phone to ring.
3. Answer your phone and then:
   a. If the customer answers the phone, begin speaking.
   b. If the customer does not answer, click Disconnect and go to "To reschedule a callback request."

To reschedule a callback request

Customers can request a callback from an agent either on the company Web site (Web callback) or in response to a menu played while the customer waited in a queue (ACD callback). If the customer does not answer the callback, you can reschedule the callback for a later time.

1. Click Disconnect.

   The Outcome dialog box (Figure 59) appears.

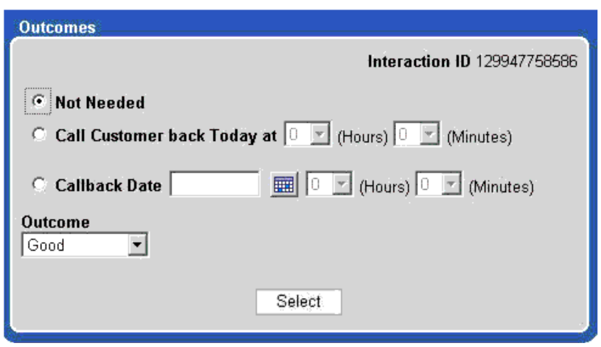


Figure 59. Outcome Dialog Box

2. Select the day and time to re-schedule the callback.

   TIP: Refer to Table 6.

3. Select an outcome from the drop-down list.

   TIP: Refer to Table 6.

4. Click Select.

   CCA will call the customer back at the date and time you specify.

Table 6 explains each of the options available on the Outcome dialog box.

Table 6. Outcome Rescheduling Options

Option	Action
Not Needed	Record an outcome for this Interaction without rescheduling a callback.
Call Customer Back Today at	Reschedule the callback for later today. Choose the hour and minute to call back the customer. CCA calls the customer at the time you specify and routes the interaction to an *available* agent.
Callback Date	Reschedule the callback for a future time. Click the calendar icon to choose the day to call back the customer, and then choose the hour and minute in the adjacent boxes. CCA calls the customer at the time you specify and routes the interaction to an *available* agent.
Outcome	Your administrator can create a list of outcomes to describe the result of a call or callback. Your administrator can also make it optional or required for you to select an outcome. **NOTE:** See your supervisor or administrator for more information.

Redirecting a Phone Interaction

IM has several ways to direct the caller after accepting the interaction, such as:

- Placing the Active Call on Hold
- To resume speaking with a caller on hold
- Performing a Supervised Transfer (to a workgroup, external phone number, another agent, or to your voicemail)
- Sending a Caller to Conference

Placing the Active Call on Hold

You can place an active call on hold while you handle other interactions.

TIP: Refer to "Accepting Multiple Phone Interactions" on page 59.

Click Hold. IM displays the caller's number in the Hold area. If you are not handling another phone interaction, IM rings your phone at regular intervals to remind you that you have a caller on hold.

To resume speaking with a caller on hold

1. Click the name or number of the caller in the Hold area.
2. Click Accept Interaction, answer your phone when it rings, and begin speaking to the caller.

Performing a Supervised Transfer

A Supervised Transfer lets you speak to the person who will receive the call before you make the transfer. That way, you can give the receiving party information they may need before taking the call.

To perform a supervised transfer

1. Place the caller on hold.

   TIP: Refer to "Placing the Active Call on Hold" on page 65.

2. Dial the person who will receive the call.

   For example, use the dialer to call their number. When the call connects, click Accept Interaction.

   TIP: Refer to "Making External Calls" on page 48.

3. Tell the person that you about to transfer a call and provide any other useful information about the caller.
4. From the Multimedia Interaction Control area, select the caller to transfer.
5. From the Interaction Controls area, click Supervised Transfer.

   CCA connects the caller to the person receiving the transfer, and disconnects you from the interaction.

Performing an Unsupervised Transfer

Perform an unsupervised transfer when you do not need to speak to the person who will receive the transfer.

NOTE: Unless the call *must* be handled by a specific agent, send unsupervised transfers to a workgroup. If you transfer a call to a specific agent and that agent is unavailable, CCA sends the caller to the agent's voicemail, which may not meet the customer's needs.

To transfer a call to a workgroup, another agent, or an outside line

1 From the Interaction Controls area, and while on an ACD call, click Transfer to.

The Transfer dialog box (Figure 60) opens.

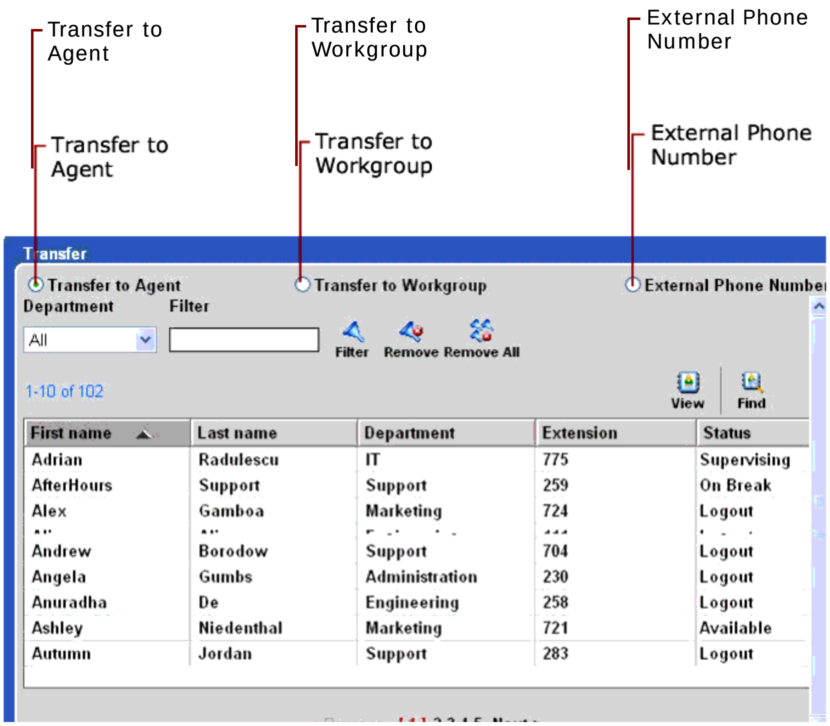


Figure 60. Transfer Dialog Box

2 To transfer the call to an agent, do one of the following:

- Click Transfer to Agent, and then double-click the name of the agent who will receive the call.
- Click once on the agent name, and then click Transfer to Agent.
- Click once on the agent name, and then click the View Contact icon (or the Find Contact icon) to retrieve the agent's contact record. Then, when the contact record appears, transfer the call by clicking on the agent's extension number.

3 To transfer the call to a workgroup:

- Click Transfer to Workgroup, and then double-click the workgroup that will receive the call.

4 To transfer the call to a external phone number:

a   Click External Phone Number.

The External Phone Number dialog box (Figure 61) opens.

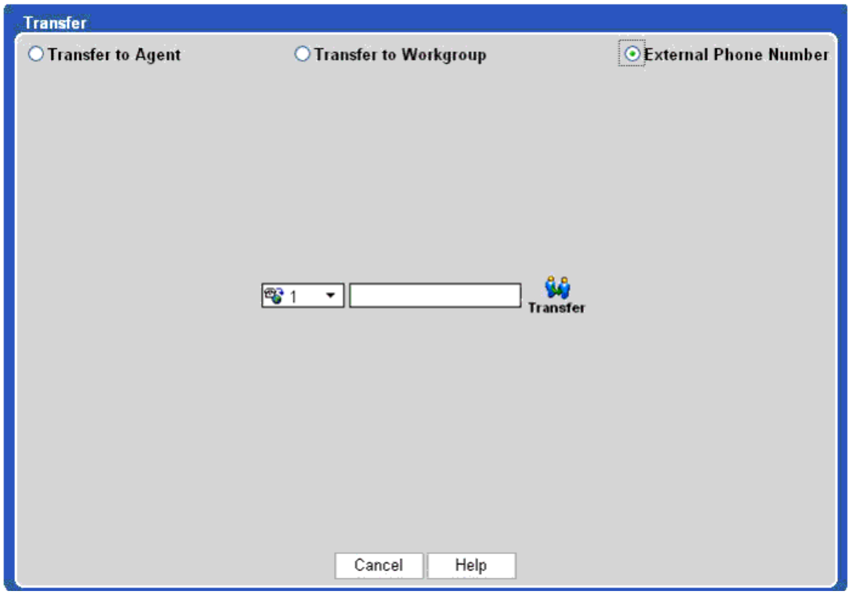


Figure 61. External Phone Number Dialog Box

b   Select a country code from the list box, enter the external phone number in the adjacent box, and click the Transfer icon.

To transfer a caller to your voicemail

1   Do one of the following:

- From the Interactions Controls area, click Voicemail.
- In the New Interactions area, click the caller's name or number.

2   Click and drag the name from the New Interactions area to the Voicemail area.

CCA prompts the caller to leave a voicemail message.

Sending a Caller to Conference

You can direct callers to a conference where several people can communicate simultaneously. If you initiate a conference, you can exit the conference but your line is still engaged and you are unable to handle new phone interactions. You can return to the conference or exit permanently while the other participants continue speaking.

Creating a Conference

Before you can create a conference, you must have one active interaction.

To create a conference

1 Accept the Interaction.

TIP: Refer to "Accepting a New Phone Interaction" on page 58.

NOTE: Notice that IM displays available information about the caller in the Active Interaction area.

2 Click Conference (or drag the name in the Active Interaction area to the Conference area) (Figure 62). You are now in a conference with the caller.

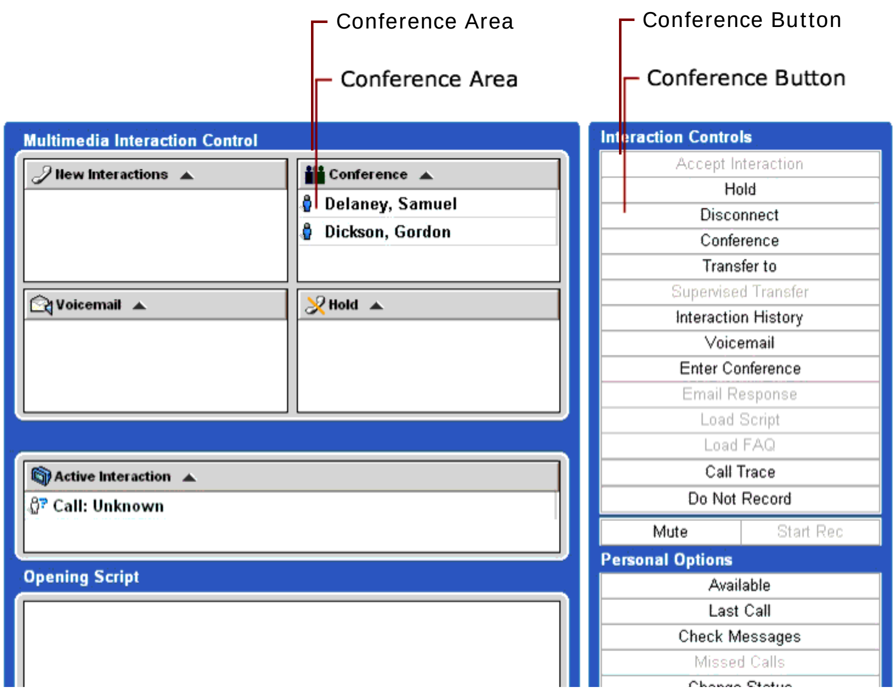


Figure 62. Two Callers in a Conference

NOTE: All conference participants can hear each other while they remain in the conference.

3 Add other callers to the conference. For example:

a Dial another number and when the call connects, accept the interaction.

b Select the name or number of the new call and then click the Conference button (from the Interaction Controls area).

TIP: Refer to "Accepting Multiple Phone Interactions" on page 59.

Exiting a Conference

You can exit a conference, leaving the remaining participants to continue talking to each other.

To exit a conference

1. From the Interaction Controls area, click Exit Conference. The callers still participating in the conference still appear in the Conference area.
2. Click Available so you can accept new calls.

   TIP: Refer to "Accepting Multiple Phone Interactions" on page 59.

Re-enter a Conference

- If you have exited an existing conference for any reason, you can re-enter the conference by clicking the Enter Conference button (from the Interaction Controls area).

Removing a Caller From a Conference

You can remove a caller from a conference, while allowing other participants to continue speaking.

To remove a caller from a conference

1. In the Conference area, select the caller to remove.
2. Click Hold to place the caller on hold (or click Disconnect from the Interaction Controls area). If you placed the caller on hold, the caller will hear the hold recording (if any), and cannot participate in the conference.

Reinviting a Caller Back to a Conference

You can invite the caller back to a conference.

To reinvite a caller back to a conference

1. In the Hold area, select the caller.
2. Click Conference **(**from the Interaction Controls area).

NOTE: If you disconnected the caller, the caller is removed from the conference and from the contact center. The remaining people are not affected and can continue their conference.

Muting Your Workstation

You can mute your workstation so that the caller cannot hear you, but you can still hear the caller.

To mute your workstation

1. From the Interaction Controls area, click Mute. The caller hears silence, unless they are participating in a conference. Conference participants can still hear each other, but no callers can hear you.

   NOTE: The *Mute* button changes to *Unmute*.

2. Click the Unmute button to turn off muting.

Recording a Caller

If configured, Interaction Manager lets you record any Interaction, unless the caller asks that they not be recorded. In this case, select Do Not Record (Figure 63) from in the Interaction Controls area.

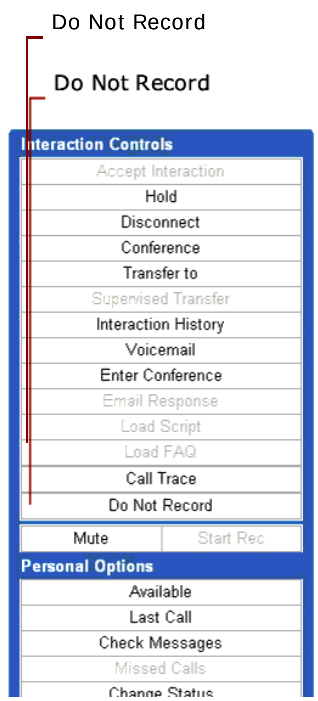


Figure 63. Do Not Record Selection

Once selected, Do Not Record turns ***Red*** (Figure 64 on page 72) indicating it is active.

Do Not Record is Red
When Active

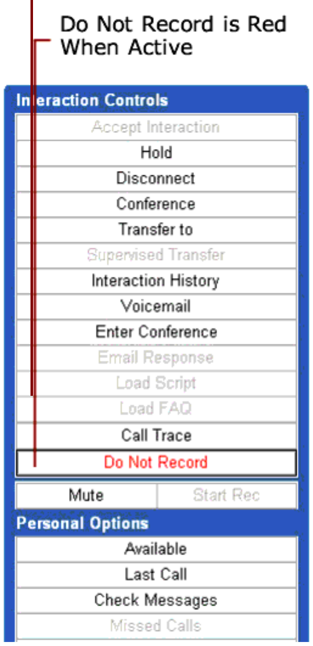


Figure 64. Active Do Not Record

Recordings are saved in a database and are useful in documenting a caller's responses or consent.

If not configured, you must first create a Contact record for the caller and assign the Interaction to the Contact record.

TIP: Refer to "To create a new contact record" on page 99 for information on creating a Contact record for a caller.

To record a caller

1. Make sure that call recording is allowed by law in your area.
2. If required by law, notify the caller that you are recording the conversation.
3. Click Start Rec on the Interactions Control group. The Start Rec button changes to Stop Rec, indicating that you are recording the call.

4 Click **Stop Rec** to stop recording the call or end the Interaction. Interaction Manager saves the recording in the database.

CAUTION: If the caller asks not to be recorded, click **Do Not Record** from the Interaction Controls area, which immediately stops all recording.

CAUTION: When activated, "Do Not Record" turns ***red***. This status remains with the caller's interaction even if you transfer the caller to another workgroup, agent, or anywhere within CCA.

NOTE: The call trace/SNMP trap is sent upon selection. If you click **Do Not Record**, the recording stops. The trace will still be initiated, however.

TIP: Refer to "Enabling Call Trace" on page 73.

TIP: Also see "Listening to a Recorded Interaction" on page 111 for information on playing back a previously recorded Interaction.

Ending an Interaction

There are three ways to end a phone interaction:

- Hang up your phone
- Enabling Call Trace
- Disconnect from the caller

Hanging Up

If you use a phone extension at your workstation, (you are not using a VOIP headset), and you have only one caller, you can simply hang up your phone to end the Interaction. Do not click **HangUp** (located in the bottom left corner of the screen) because you will be disconnected from the server. This selection is not for disconnecting calls.

NOTE: Selecting the Hang Up button does ***not*** disconnect interactions that are on hold or in conference.

Enabling Call Trace

CCA lets an agent initiate a Call Trace for emergencies. The Call Trace feature also activates recording.

To enable call trace

1 Under the Interaction Controls area, click the Call Trace button (Figure 65), which turns ***Red*** showing it is active.

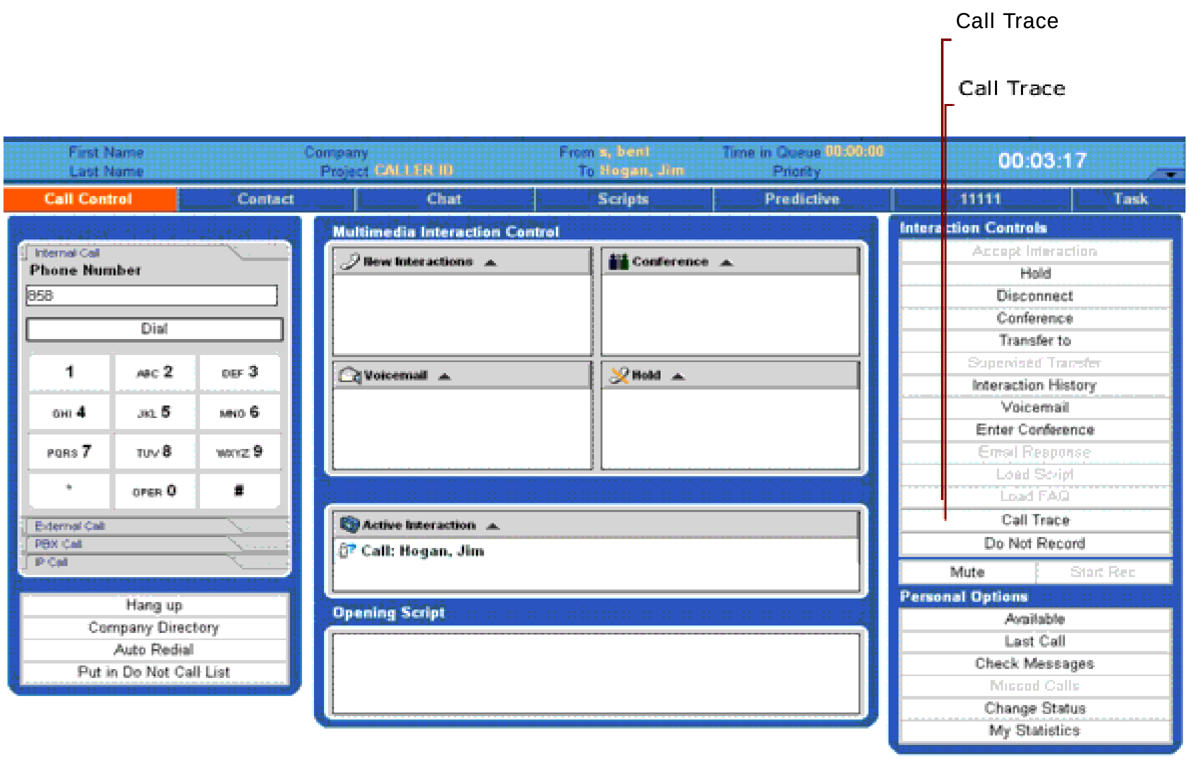


Figure 65. Call Trace Button

An *Are you sure?* message appears.

2 Click **Yes** to activate the trace. The Call Trace button changes to *Call Trace Initiated* and stays red.

NOTE: If recording is enabled, call trace also activates recording the call.

3 When the trace has been completed, the button changes to *Call Trace Complete.* This status remains until the call is disconnected.

4 After the call is disconnected, the button returns to *Call Trace*.

CAUTION: If the caller asks not to be recorded, click **Do Not Record** from the Interaction Controls area, which immediately stops the recording.

Disconnecting a Caller

If you have multiple callers in your call control screen, you can select one caller and disconnect only that caller without hanging up your phone.

To disconnect a caller

1. Click the caller to disconnect on the call control screen.
2. Click Disconnect.

   The caller is disconnected and removed from your call control screen.

You can resume an interaction with another caller by clicking the caller's interaction and clicking Accept Interaction (or by selecting the caller and dragging the New Interaction icon to the Active Interaction control).

Assigning Outcomes

An outcome describes the result of an interaction, such as *Sale*, *Request for Literature*, *Request for Product Change*, and so forth. Your administrator creates a list of outcomes that are customized for your contact center.

Outcomes are an optional feature of CCA. Your administrator may decide not to use them, but can also require you to select an outcome at the end of every interaction.

NOTE: See your supervisor or administrator if you are not sure how outcomes are used in your contact center.

To assign an outcome to an interaction

1. If your contact center uses outcomes, the Outcome dialog box (Figure 66) opens when the interaction ends. If required, you may not be able to accept another interaction until you select an outcome.

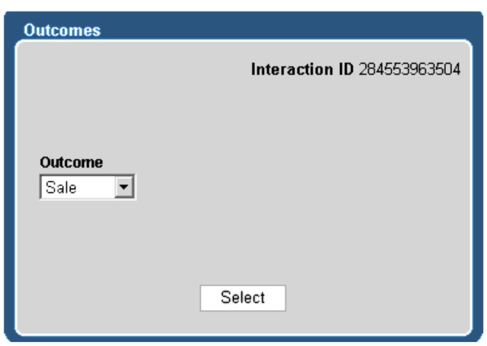


Figure 66. Outcome Dialog Box

2. Select the outcome that best describes the result of the Interaction from the drop-down list.
3. Then, click the Select button.

6 Handling Chat Interactions

Web based chat is a fast, cost-effective way to provide immediate, live assistance to internet customers. This chapter discusses the IM tools for handling chat requests coming into the contact center and for providing service to your chat-based customers. It includes the following topics:

Accepting a New Chat Interaction

When you receive a new chat interaction, IM notifies you by displaying the Call Control screen or by playing a sound. IM also displays the customer's name (if they entered one in the chat form) in the New Interactions area.

TIP: See "Identifying How to be Notified (for New Interactions)" on page 31.

If you do not accept a new chat interaction within 60 seconds, CCA sets your status to *No Answer* and places the interaction back into the queue for handling the next *available* agent.

NOTE: If you already accepted a chat interaction, make yourself available to accept a phone interaction by clicking the *Available* button on the Call Control tab.

To accept a chat interaction

1 Click the customer's name in the New Interactions area.

2 Click Accept Interaction on the Interaction controls (or select the chat and drag the New Interaction icon to the Active Interaction area).

IM displays the Chat Screen (Figure 67).

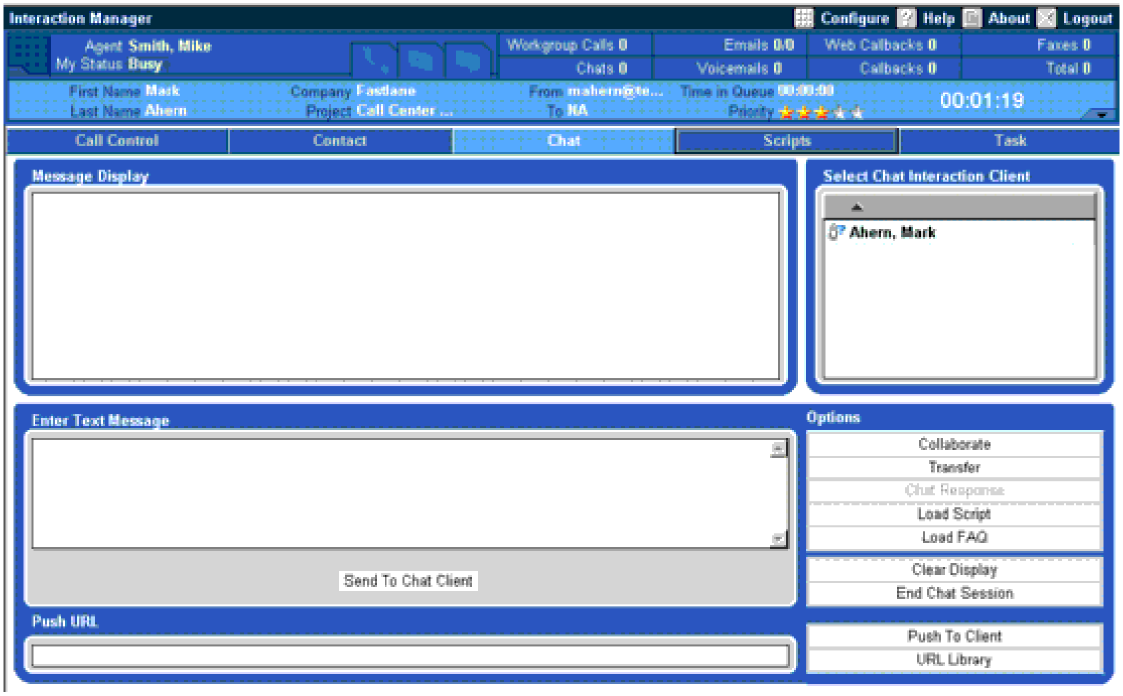


Figure 67. Chat Screen

3 If your administrator provided a script (or FAQ content) for the chat project, click Script (or FAQ) in the options to display them. After you click the script (or FAQ) button, the information loads into the Scripts tab.

4 To send information from the Script or FAQ to the customer:

- **a** Click the Scripts tab.
- **b** Copy the information from the Script (or FAQ). How you do this depends on your operating system, but usually you can select text with the mouse, bring up a pop-up menu, and choose Copy.
- **c** Click the Chat tab and paste your text.
- **d** Click the Send to Chat Client button.

5 To send your chat message to the customer:

- **a** Paste or type your message in the Enter Text Message box.

b Click Send To Chat Client (or press Enter). Your message appears in the Message Display text (Figure 68) box.

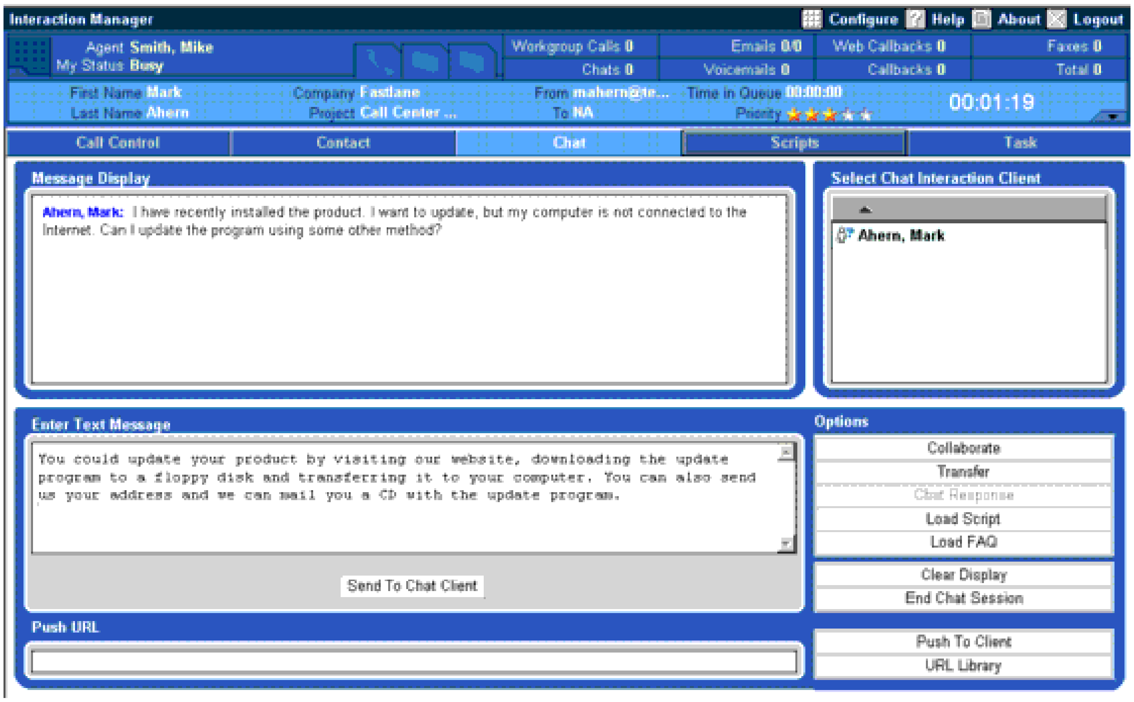


Figure 68. Example Chatting With a Customer

Sending Prepared Content to a Chat Customer

You can use the Chat screen to send helpful content supplied by your administrator to the customer. IM lets you send content from:

- Intelligent Chat Template Response Library
- Web site links from the URL Library

If your administrator has developed Intelligent Chat Templates or a compiled a collection of helpful Web pages, you can quickly access this information for sending to the customer.

To send content from the Intelligent Chat Response Library

1 Accept the incoming chat interaction.

TIP: See "Accepting a New Chat Interaction" on page 77.

2 In the message display area, highlight the text to search for in the Intelligent Chat Response Library provided by your administrator.

3 Click Chat Response.

If your administrator set up Intelligent Chat Response Templates, IM displays the Chat Response dialog box (Figure 69), listing each template with a relevance score (higher score indicates that the highlighted text contained a greater number of Intelligent Chat template keywords).

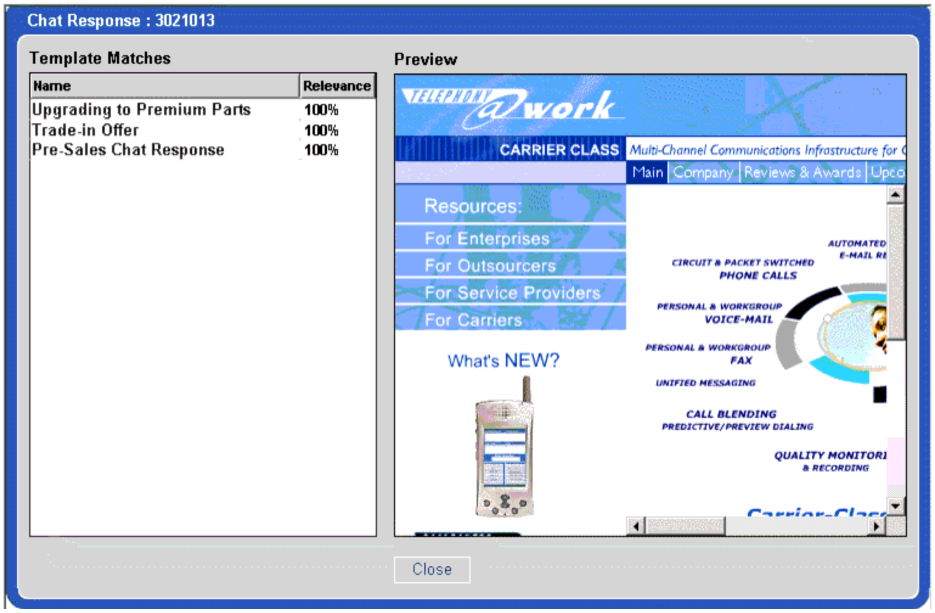


Figure 69. Chat Response Templates and Preview

4 Click a template name to display that template's content in the Preview pane.

5 Copy the information from the template.

NOTE: How you do this depends on your operating system, but usually you can select text with the mouse, bring up a pop-up menu, and choose Copy.

6 Paste the content into the Enter Text Message area of the Chat Screen.

7 Click Send to Chat Client.

To send a Web site link (URL) to a customer

1 Select the customer that you want to chat with in the Select Chat Interaction Client control.

2 Enter the address in the Push URL text box (Figure 70).

NOTE: You do not need to type `http://` before the address.

Push URL

Push URL

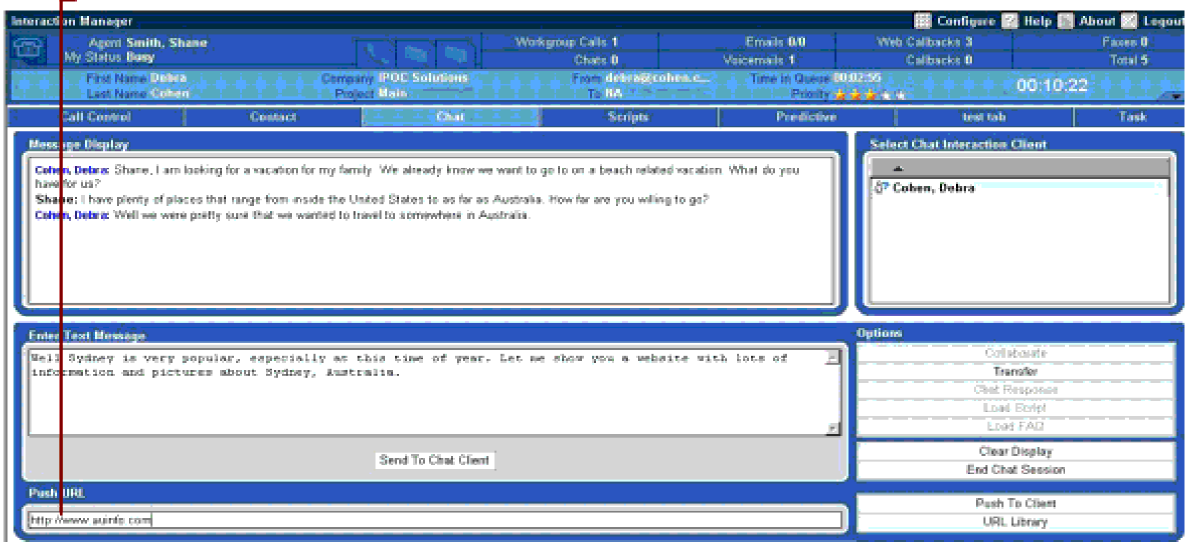


Figure 70. Example of Pushing a URL

3 Click Push To Client. The Web site you sent the customer appears on the customer's screen.

NOTE: The customer must have a recent version of either Internet Explorer or Netscape Navigator installed on their computer.

To send a Web site link from the URL Library to the customer

Your administrator may have set up one or more Web pages that can be useful to your customer. To make one of these Web pages appear on the customer's screen without typing the URL address in the Push URL text box:

1 Select the customer to chat with in the Select Chat Interaction Client control.

2 Click URL Library (in the Options area).

3 Click a Push Library Name and click Select.

The Web page appears on the customer's screen.

About Collaboration

Collaboration means that you and your customer can view and change the same Web page. For example, you can make a Web page appear on the customer's chat screen, you can see that Web page, enter text in a text box, click on list boxes, and so forth. The customer sees your changes and you can see changes that your customer makes. The collaboration features lets you help your customer navigate a Web site or fill out Web-based forms.

The collaboration feature assumes that both agents and customers have their Internet Explorer security settings at default levels for both the local intranet and the Internet.

- The Internet Explorer default setting for the Local Intranet is Medium-Low.
- The Internet Explorer default setting for the Internet is Medium.

To change your Internet Explorer security settings

1. Start Internet Explorer.
2. From the Tools menu, select Internet Explorer.
3. In the Internet Options menu, click the Security tab.
4. Click the Internet icon and then click Default.

   NOTE: Collaboration only works for Web pages that the customer views through their Chat screen. If the customer opened a browser by themselves, you cannot see it.

To use collaboration

1. Select the customer to chat with in the Select Chat Interaction Client control.
2. Send a text message to the customer, alerting them that you are going to remotely control their browser.
3. Click Collaborate.

   IM displays the customer's screen in the resulting window.
4. Complete the task for the customer and close the browser window.

Transferring a Chat to Another Workgroup or Agent

You can transfer a customer chat to another workgroup or agent, or to a supervisor working on the project.

To transfer a chat to another workgroup or agent

1. Select the customer to chat with in the Select Chat Interaction Client control.
2. Click Transfer.

   The Transfer dialog box appears.

3 Double-click the name of an agent, and then click Cancel to close the Transfer dialog box.

CCA removes the chat interaction from your IM, and one of the following happens:

- If the agent accepts the transferred chat, IM sends a transcript of your previous communication with the customer to the agent.
- If the agent is unavailable to accept the chat interaction, CCA transfers the customer back to you.

Ending a Chat Session

When you finish chatting with a customer, end the session so that IM can save the interaction in the Contact database and update your interaction statistics.

CCA can only save the interaction to the database if you have assigned a contact to the customer.

TIP: See "How Are Contacts Assigned?" on page 107.

To end a chat session

1. Select the customer to chat with in the Select Chat Interaction Client control.
2. Send a message to the customer indicating your are finished chatting.
3. Click End Chat Session.

7 Handling Email Interactions

Customers contact CCA agents by email. Interaction Manager (IM) integrates with your email program so you can respond to customer's email messages. This chapter describes the IM tools for handling email interactions coming into the contact center. It includes the following topics.

Accepting a New Email Interaction

- When you receive a new email interaction, IM notifies you by displaying the Call Control screen or by playing a sound.

  TIP: See "Identifying How to be Notified (for New Interactions)" on page 31.

- IM also displays the sender's email address in the New Interactions area.
- IM also displays the contact's name in the New Interactions area, if there is a contact record in the CCA database associated with the email header information.

CAUTION: If you do not accept a new email interaction within five minutes, CCA sets your status to *No Answer* and places the interaction back into the queue for the next *available* agent.

To accept a new email interaction

1. Select the email in the New Interactions area.
2. Click Accept Interaction (on the Interaction controls area), or select the email and drag the New Interaction icon to the Active Interaction area.

   IM displays available information about the customer in the Active Interaction area, and launches your email client.

NOTE: If you have already accepted an email interaction, you ***must*** change your status to *Available* before CCA will present any additional interactions. Do this by clicking the Available button on the Call Control tab.

Accepting Multiple Interactions

Most of the time, you will probably handle only one interaction at a time. However, if you need to, you can accept multiple interactions, such as an email and a phone call

To accept multiple interactions

1. When CCA offers you an email, accept it.

   TIP: See “Accepting a New Email Interaction.”

   NOTE: Notice that when a new phone interaction arrives, it appears in the banner but CCA will not present it to you as long as your status is *Busy*. Your status must be *Available* before CCA will present the new interaction to you.

2. To make yourself available to accept a phone interaction, click Available (Figure 71).

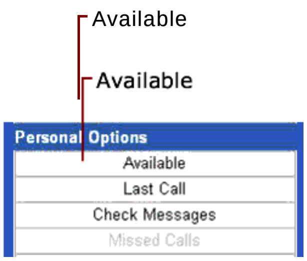


Figure 71. Available Button (Personal Options)

Your status changes to available and CCA presents the new interaction.

Responding to an Email Interaction

It is important to respond to email messages routed to you by CCA. If you accept an email interaction, but do not reply to the interaction within the time allotted by your administrator, CCA places the interaction back into the queue for the next *available* agent.

NOTE: If you attempt to reply to the accepted email after the time limit has elapsed, or after another agent replies to the same email, CCA does not deliver your reply to the customer.

To reply to an email interaction

1. Accept the email interaction or click Check Messages.

   CCA launches your email client program.

2. If a contact record was not assigned to this customer, create and assign the contact record now.

   TIP: See “To create a new contact record” on page 99.

   NOTE: To save the interaction history for this interaction, you must assign a contact record ***before*** you send your response. (If a contact record does not exist for the email customer, CCA cannot save the current interaction history in the history records for the customer.)

3. If your administrator has supplied a script, click Load Script (or Load FAQ on the Call Control Screen).

4. If you want, you can copy some of the Script or FAQ material into your email response to the customer.

5 If your administrator has set up Intelligent Email Templates, click Email Response in the Interaction Controls area of the Call Control screen to see a list of recommended responses.

Each Intelligent email template created by your administrator appears with a confidence score (higher score indicates that the customer's email contained a greater number of Intelligent email template keywords).

a Click the Intelligent Email Template name to view the content of each template.

b Copy the displayed content of the Intelligent Email Template.

c Switch to your email application and paste the copied content into the body of your message.

6 Send your email to the customer.

NOTE: When drafting your response, remember that customers are writing to a project email address (such as techsupport@acme.com) and not to you personally. Your return address, which is sent to the customer, is also the project email address, not your personal email address.

Discarding an Email Interaction

If you decide that an email interaction does not require a response, you can discard the email. When you discard an email interaction, CCA removes it from your IM without sending a response to the customer.

NOTE: CA stores the content of the customer's email for later review by your administrator.

To discard an email interaction

1 Make the email interaction that you want to discard the Active Interaction.

2 Click Disconnect in the Interaction Controls area.

3 Do one of the following:

- If your Administrator does not require you to supply an outcome for each interaction, CCA displays the **Discard email** dialog box (Figure 72).

Figure 72. Discard Email Dialog Box

  - Click Yes to discard the email.

NOTE: If you select **No**, CCA will not remove the email from IM. It remains connected to the interaction and CCA places the interaction back into the queue for the next *available* agent.

- If your administrator requires you to supply an outcome for each interaction, CCA displays the Outcome dialog box (Figure 73).

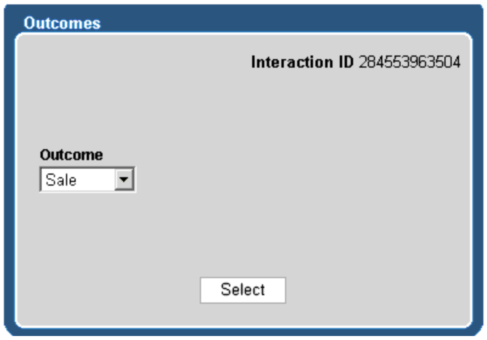


Figure 73. Outcome Dialog Box

- Select an Outcome from the list box and click Select.

8 Handling Predictive Interactions

This chapter describes how to manage predictive interactions (for contact centers that have this option.) It includes the following topics:

- Logging in to a Predictive Project
- Logging Out of a Predictive Project
- Handling a Predictive Interaction
- Placing a Customer's Phone Number in the Do Not Call List

Logging in to a Predictive Project

NOTE: Predictive calling is an optional feature of CCA. The Predictive screen is available only if the feature is configured on your system.

In predictive calling, CCA automatically dials a series of phone numbers of existing customers or potential customers. If a customer answers the phone, they are connected to an agent who will usually read a prepared script. The most common use for predictive calling is to offer products and services to new or existing customers.

NOTE: While you are handling a predictive interaction, CCA does not route incoming phone project calls to you.

To make yourself available to accept predictive project interactions

1 If you are ready to accept interactions generated by a predictive project, access the Predictive Screen (Figure 74) to log in to the project.

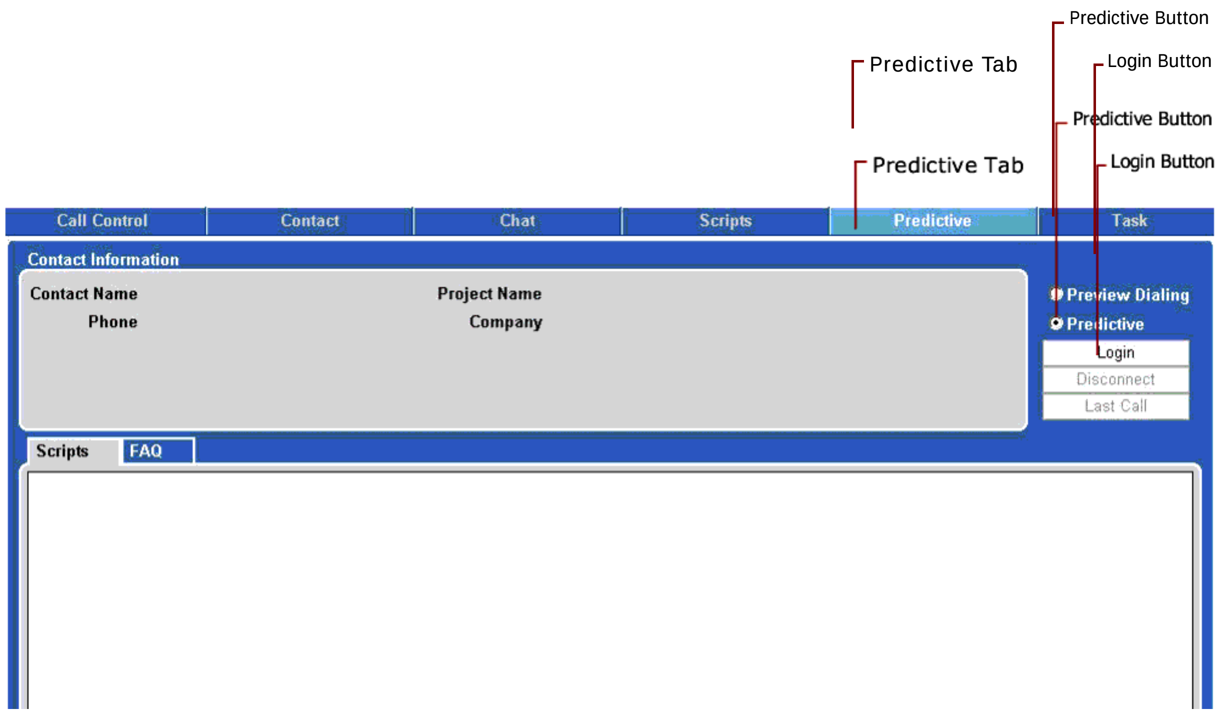


Figure 74. Predictive Screen

2 Click the Predictive tab to open the Predictive Screen.

3 Click the Predictive radio button.

The Login button appears.

4 Click Login.

CCA routes predictive interactions to you.

Logging Out of a Predictive Project

Click the Logout button (formerly the Login button). CCA stops routing predictive interactions to you.

Handling a Predictive Interaction

When your administrator starts a predictive project, the system starts dialing the numbers of prospective customers. If a prospective customer answers their phone, CCA rings your extension.

To accept a predictive interaction

1. Answer your phone handset when it rings. IM displays the prospective customer's name, phone number, and company name on the Predictive screen.
2. Read the text in the Opening Script area (if your administrator has provided an Opening Script for your project).
3. Click Load Script (or Load FAQ) to display the Scripts screen containing text provided by your administrator for your project.
4. If the customer asks you not to call them again, you can remove their phone number from the calling list by:
   a. Clicking the Call Control tab.
   b. Clicking Put in Do Not Call List (located in the lower left, under the Dialer).

      NOTE: CCA will not dial the customer's number again during predictive or preview calling.
5. When you finish the interaction, hang up your phone (or click the Call Control tab, and click Disconnect from the Interaction Controls area).
6. If your company uses outcomes, select an outcome from the Outcomes dialog box.

Placing a Customer's Phone Number in the Do Not Call List

There may be times when a customer requests that your contact center not call them again. When this happens, add their telephone number to the Do Not Call List.

NOTE: The Do Not Call List only applies to Predictive calling projects.

To place a customer’s phone number in the Do Not Call List

1 While speaking with the customer, click Put in Do Not Call List (Figure 75) in the Call Control tab.

Put on Do Not Call List

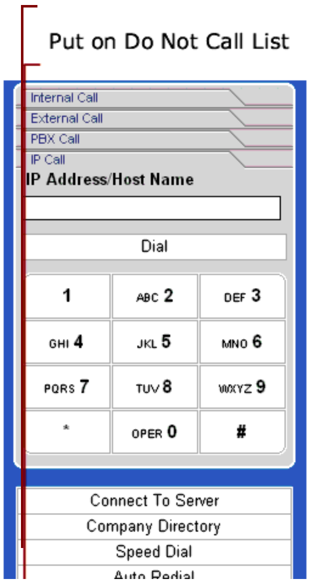


Figure 75. Call Control: Put in Do Not Call List Button

The Add Phone Number to include in Do Not Call List box (Figure 76) appears.

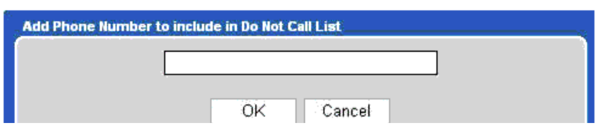


Figure 76. Add Phone Number to Include in Do Not Call List Dialog Box

2 Type the phone number in the text box.

NOTE: Type the area code and phone. Be careful to type it correctly, because you cannot correct it later.

3 Click OK.

Now, when your administrator runs the Clean List tool, the number is added to the Predictive Dialer so that CCA will no longer automatically dial the number during a predictive project.

9 Handling Preview Interactions

This chapter describes how to manage preview interactions (for contact centers that have this option). It includes the following topics:

About Preview Calling

NOTE: Preview calling is an optional feature of CCA. The Preview screen is available only if the feature is configured for your company.

In preview calling, like predictive calling, potential customers are called and offered new products and services. The difference between predictive and preview calling is the way that the number is dialed:

- In predictive calling, the system automatically calls a number. If a customer answers the phone, the system routes the customer to an available agent.
- In preview calling, the agent tells the system to dial a customer number, and then waits for the customer to answer.

NOTE: While you are handling a preview interaction, CCA will not route project phone calls to you.

To make a preview calls

1 Click the Predictive tab.

The Preview Screen (Figure 77) opens.

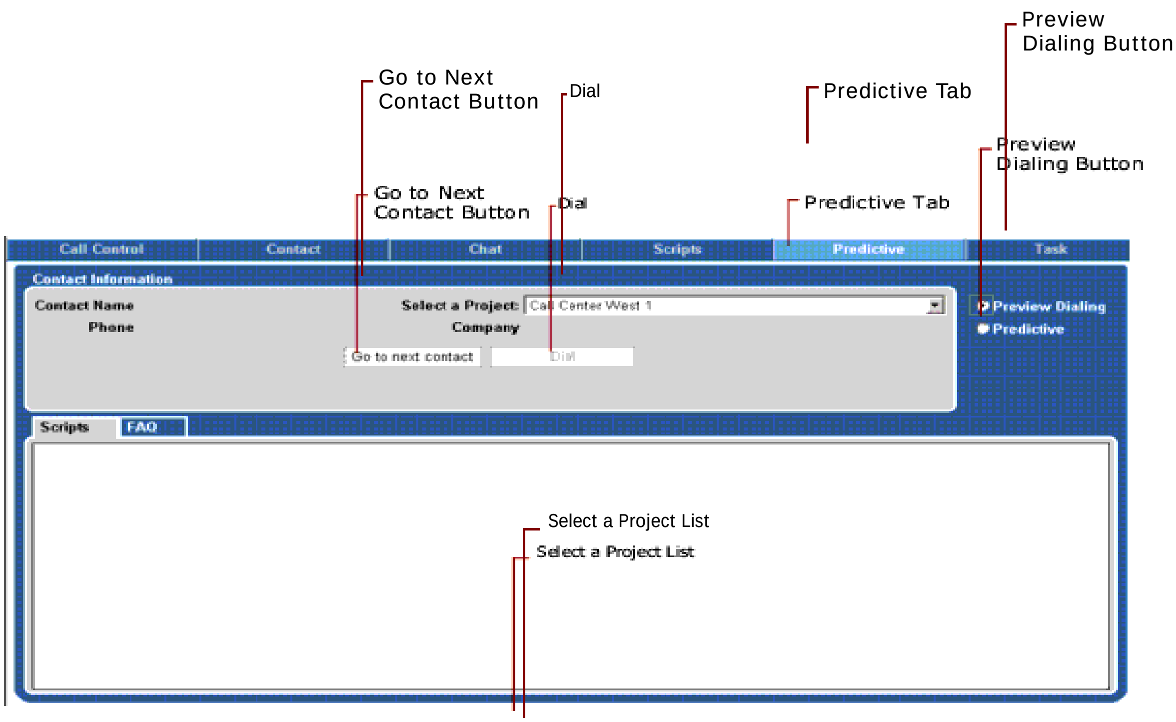


Figure 77. The Preview Screen

2 Click Preview Dialing, and select a Project from the Select a Project list box.

NOTE: If your administrator created a script for preview calling, it appears in the Script area.

3 Click Go to next Contact.

CCA displays a prospective customer's name and number on your screen.

4 Click Dial.

CCA rings your extension.

5 Answer your extension and begin speaking.

■ If the customer asks you not to call them again, you can remove their phone number from the calling list by clicking the Call Control tab, and then clicking Put in Do Not Call List (located in the lower left, under the dialer).

NOTE: CCA will not dial the customer's number again during predictive or preview calling.

6 When you finish the interaction, hang up your phone (or click the Call Control tab and click Disconnect under Interaction Controls).

CCA displays the Outcome dialog box (Figure 78).

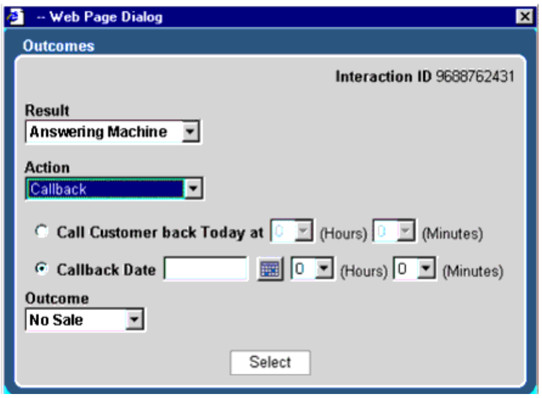


Figure 78. Outcomes Dialog Box

NOTE: The Outcomes feature is *optional* for your company, and may not be available at your company.

7 Select a result from the drop-down list. Table 7 explains the available result options.

Table 7. Outcome Result Options

Result	Description
Answering Machine	The call was picked up by an answering machine.
Invalid Entry	The number was an invalid phone number. **NOTE:** Choosing this result removes the number from the preview calling list so that CCA will not provide it to agents to call again.
Busy	The customer's phone line is busy.
Fax	The number led to a Fax machine. **NOTE:** Choosing this result removes the number from the preview calling list so that CCA will not provide it to agents to call again.
Answered	The customer answered the phone. **NOTE:** Choosing this result removes the number from the preview calling list so that CCA will not provide it to agents to call again.
No Answer	The customer's phone rang, but was not picked up by a person or an answering machine. **NOTE:** Choosing this result keeps the number on the preview calling list.

8 Select an action from the drop-down list. Table 8 explains the available action options.

Table 8. Outcome Action Options

Action	Description
None	No action is needed.
Add to Do Not Call List	Choosing this result removes the number from the preview calling list so that CCA will not provide it to agents to call again.
Callback	Call the customer back at a certain day and time. **NOTE:** Callbacks for predictive and preview calls work differently than they do for regular ACD calls. When you schedule an ACD callback (after the customer calls your company and is routed to you) the system automatically calls the customer at the right time and then connects the customer to an agent. When you schedule a callback for a predictive or preview call, the system will try to call every number in the current dialer list before it tries the callback number. **NOTE:** A dialer list is the list of predictive or preview phone numbers that the system is currently using. If there are a lot of numbers in the current dialer list, it is possible that CCA will not dial the callback at the exact time you set in the Outcome dialog box.
Personal Callback	When you choose Personal Callback, the system adds a new task to your Task tab. When the time for the callback arrives, IM opens a reminder dialog box on your machine with the customer's name and phone number.

9 To schedule a call back, select Callback from the Action drop-down list and then do one of the following:

- To call back later today, select the time (hours and minutes) from the drop-down list.

  CCA attempts to call every number in the current dialer list before it tries the callback number.

  NOTE: A Dialer List is the list of Predictive or Preview phone numbers CCA is currently using. If there are a lot of numbers in the current Dialer List, it is possible that CCA will not dial the callback at the exact time you set in the Outcome dialog box.

- To call back another day, enter a date (or select one from the calendar icon), and then select the time (hours and minutes) from the drop-down list.

10 Click Select.

10 Managing Contacts

This chapter describes how to manage contacts. It includes the following topics:

About Contacts

A contact can be anyone who has ever reached your contact center. Usually they are your customers. You can use the Contact tab in IM to create Contact records. The Contact record contains information such as the customer's name, address, phone number and email address, but can also contain notes.

When you accept an interaction from a customer, you can *assign* (or link) the customer to a Contact record to display all of the information that was previously recorded about that customer. This gives you some familiarity with the customer and their previous activity or issues.

Features of the Contact Main Screen

Figure 79 shows the Contact screen with its Contact Information list box and various agent options icons.

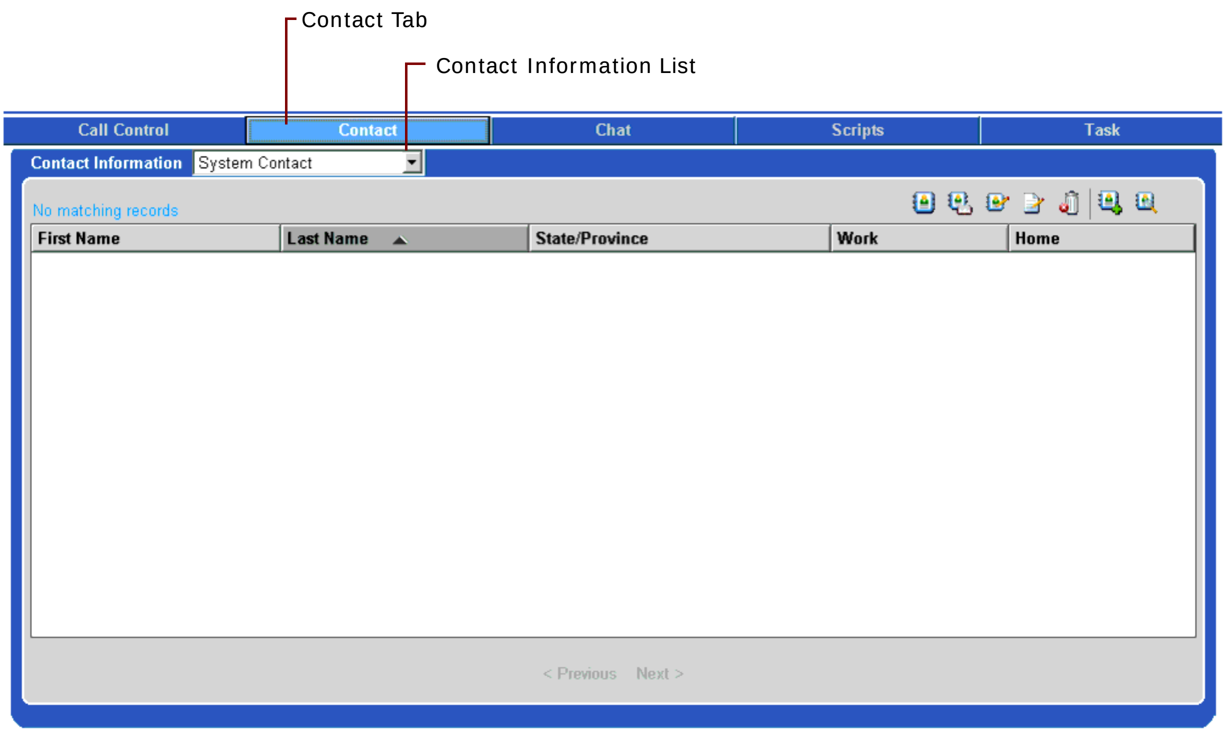


Figure 79. Contact Main Screen

About the Contact Information List

In previous versions of IM all contacts were kept in a single list. Now, your contact center can have multiple lists that are created by your administrator.

Having multiple contact lists means you can separate contacts by category. For example, you could have a contact list for domestic customers and another contact list for customers in other countries.

NOTE: Ask your administrator how contacts are configured for your contact center.

Identifying Agent Options Icons

The Agent Option icons (Table 9) give you access to all of the contact features.

NOTE: However your administrator can configure the system to remove some of these features, so you may not see all of the icons listed below.

NOTE: In addition, the list of icons that you see can change depending on which contact list you have selected in the Contact Information list box. Your administrator may give you access to some features for one contact list, but may not give you access to that feature for a different contact list. Ask your administrator for more information.

Table 9. Agent Icons

Icon	Action
	View the currently selected contact.
	View the contact history for the currently selected contact.
	Edit the contact history for the currently selected contact.
	Add a note for the currently selected contact.
	Delete the currently selected contact.
	Add a new contact record.
	Search for contacts in the current contact list.

To create a new contact record

1. After logging into IM, click the Contact tab to open the Contact Screen (Figure 79 on page 98).
2. From the Contact Information list box, select your desired contact list.

3 Click the Add Contact icon.

NOTE: Your administrator may not allow you to create contacts. If you don't see the Add Contact button, contact your administrator.

The Add Contact screen (Figure 80) appears.

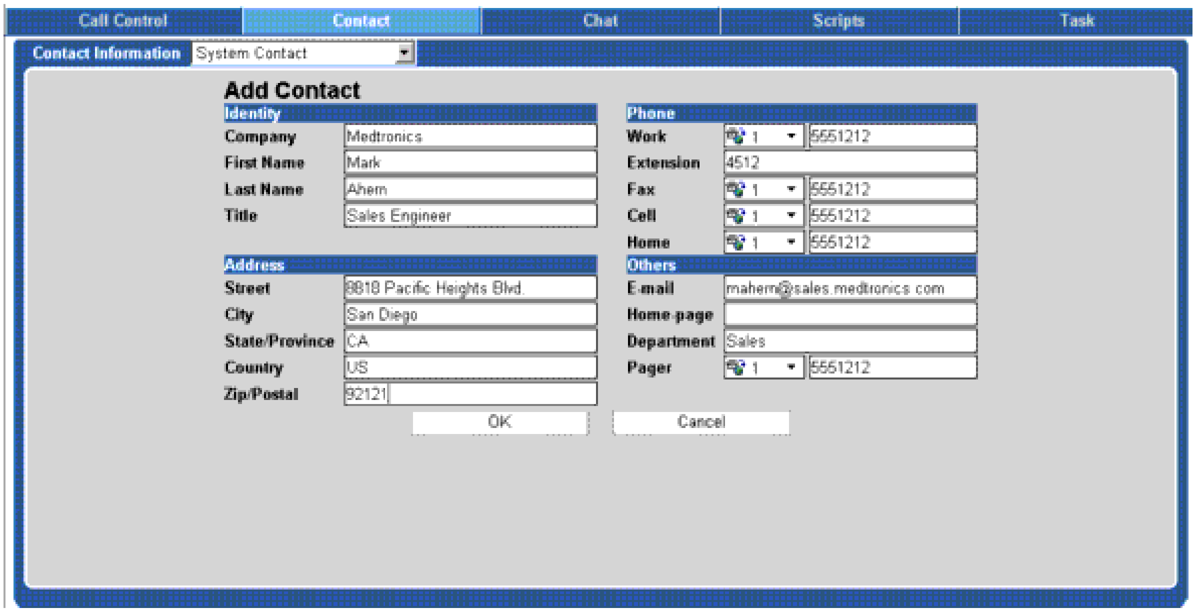


Figure 80. Add Contact Screen

NOTE: Because the Add Contact screen can be customized by an administrator, your screen may look different from the example in Figure 80.

4 Fill out the fields with information you gather from the customer.

NOTE: Your administrator can make some of the fields required.

5 Click OK to save your changes.

To edit a contact record

1 Click the Contact tab to open the Contact Screen (Figure 79 on page 98).

2 From the Contact Information list box, select the contact list containing the contact to edit.

3 Do one of the following:

- Search for a contact.

  TIP: To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102

- To quickly see all contacts in the current Contact list, click the Find Contact icon, and in the Find Contact screen, click Find without entering data into any of the fields.

4 Select the contact to edit, and click the Edit Contact icon.

NOTE: Your administrator may not allow you to edit contacts. If you don't see the Edit Contact button, contact your administrator.

TIP: If you have permissions to edit contacts, you can also right-click on the contact and choose **Edit Contact** from the pop-up menu.

The Edit Contact screen (Figure 81) appears.

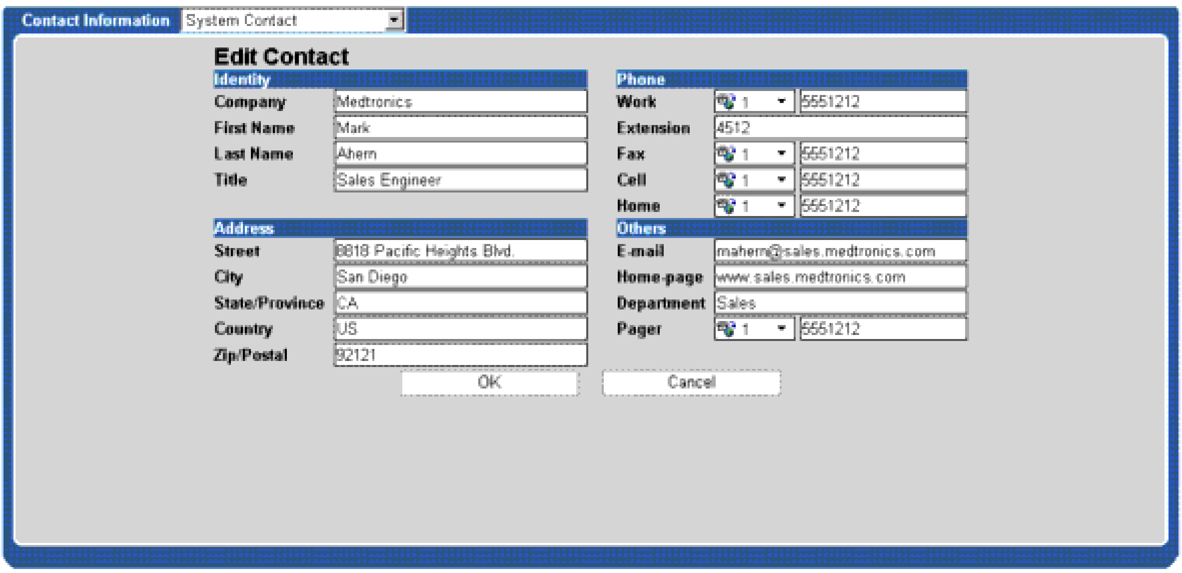


Figure 81. Example Edit Contact Screen

NOTE: Because the Edit Contact screen can be customized by an administrator, your screen may look different from the example in Figure 81.

5 Modify the data in any of the fields.

6 When you are done, click OK to save your changes.

To delete a contact record

1 Select the Contact tab to open the Contact Screen (Figure 79 on page 98).

2 From the Contact Information list box, select the contact list containing the contact to delete.

3 Do one of the following:

- Search for a contact.

  TIP: To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102

- To quickly see all contacts in the current Contact list, click the Find Contact icon, and in the Find Contact screen, click Find without entering data into any of the fields.

4 Select the contact that you want to delete and click the Delete Contact icon.

To quickly find all contacts in a contact list

1 Click the Contact tab to open the Contact Screen (Figure 79 on page 98).

2 From the Contact Information list box, select the contact list in which to search.

3 Click the Find Contact icon.

The Find Contact Screen (Figure 82) opens.

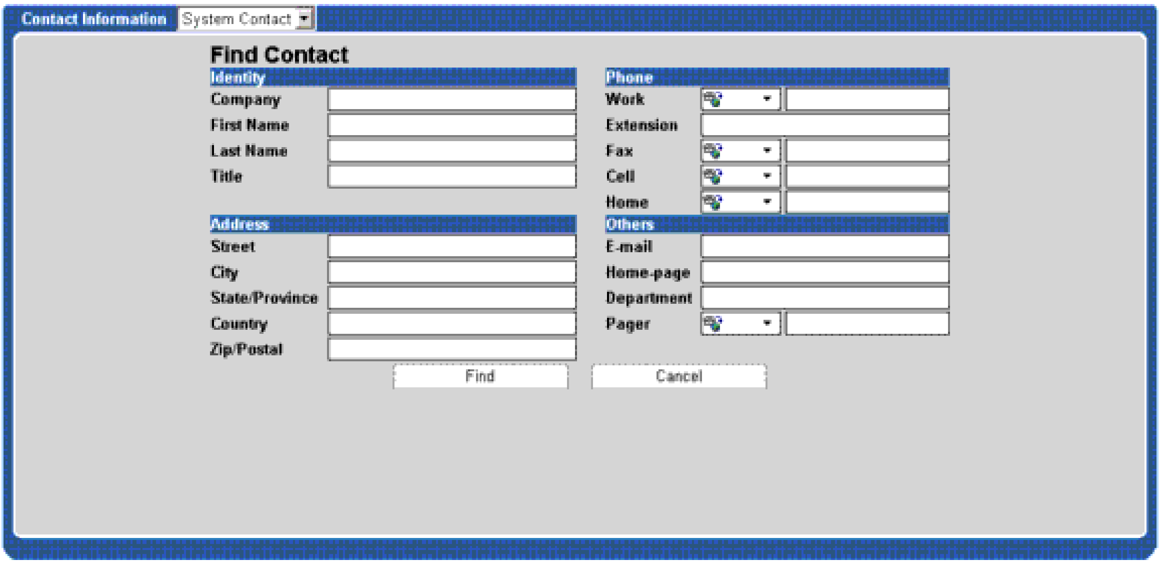


Figure 82. Example Find Contact Screen

NOTE: Because the Find Contact screen can be customized by an administrator, your screen may look different from the example shown in Figure 82.

4 In the Find Contact screen, click Find without entering data into any of the fields.

All of the contacts in the list you selected appears in the Contact Main screen (Figure 84).

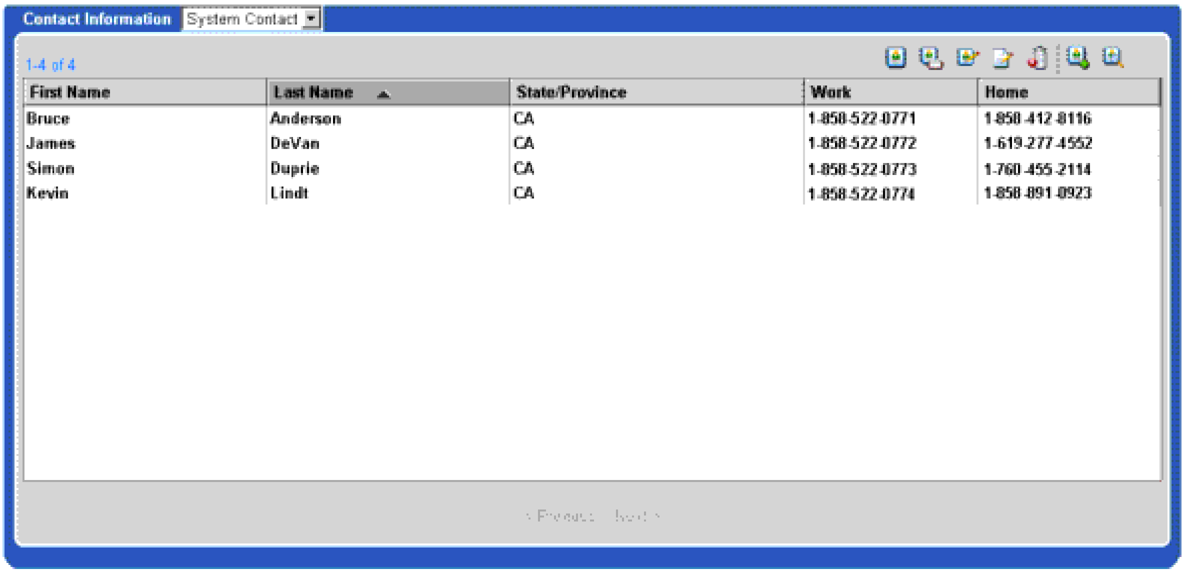


Figure 83. Example of Multiple Contact Found

5 Search for specific contacts.

To perform a simple search

1 In the Find Contact screen, enter a value into any field.

2 Click Find.

For example, to find all contacts whose last name is Smith, enter Smith in the last name field and click Find.

CAUTION: Searches are not case sensitive, so *Smith = SMITH = smith*.

If only one contact record matches your search, Interaction Manager shows you the FULL record for that specific contact.

TIP: For an example, see Figure 85 on page 105.

If more than one contact matches your search, Interaction Manager shows you the list of contacts matching your search in the Contact Main screen.

TIP: For an example, see Figure 86 on page 106.

Performing a Wildcard Search

IM supports the asterisk (*****) as a wildcard character:

- The asterisk tells CCA to *match any number of any characters*.
- You can use wildcard searching in any field in the Find Contact screen.
- Type the asterisk (*****) anywhere in the word or number for which you searching (meaning in the beginning, middle, or end).
- If your search is too broad and returns over 500 results, you must narrow your search and retry it again.

Examples:

1. If some agents have entered the contact's State/Province as *Ca*, *CA*, *Calif.*, and *California*, you could find all contacts in California by entering:

   `ca*`

   in the State/Province field.

2. To find all contacts whose work number is in the *212* area code, enter:

   `212*`

   in the Work field.

3. To find any contact whose title contains the word *Sales*, enter

   `*sales*`

   in the Title field.

Viewing a Contact

- Use the techniques beginning with "To quickly find all contacts in a contact list" on page 102 to find one or more contacts.

- If your search only matched one contact, IM automatically shows you the full record for the contact. Figure 84 shows an example.

Figure 84. Example Viewing a Contact When One Contact is Found

> **NOTE:** Because the contact screens can be customized by an administrator, your screen may look different from the example shown in Figure 85.

- If your search matched more than one contact, IM shows you a list of all contacts matching your search (Figure 85).

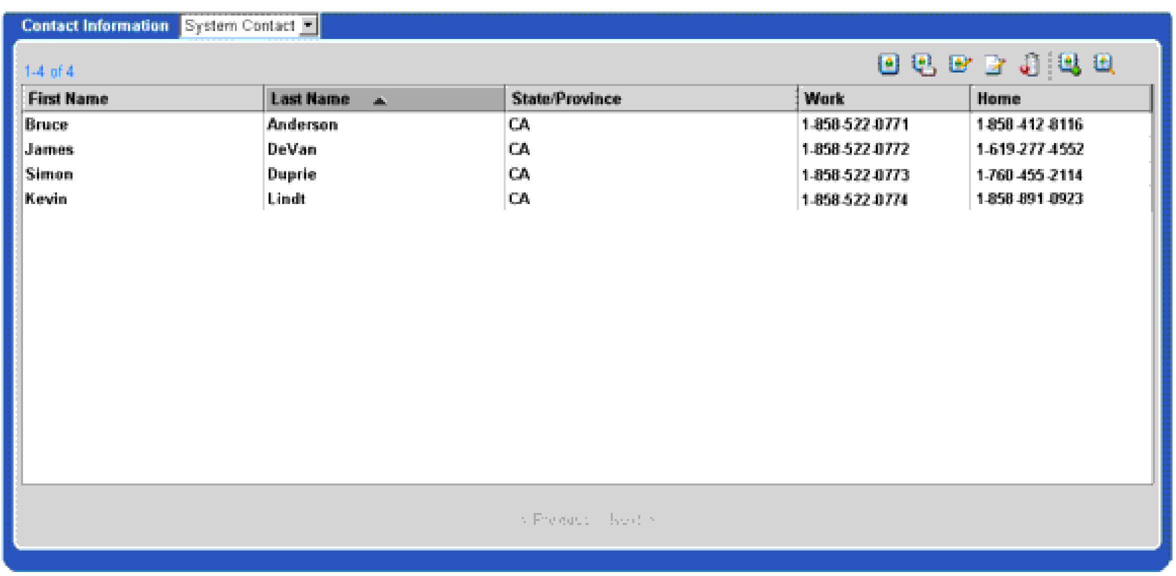


Figure 85. Example Viewing a Contact When Multiple Contacts are Found

To view one of the contacts:

- Do one of the following:
  - Select the contact and click the View Contact icon.
  - Right-click on the contact and choose View Contact from the pop-up menu.
  - Double-click the contact.

Assigning Contacts - An Overview

A Contact is a record that can have:

- Basic information about the customer (such as their name, address, phone number, and email address).
- A history of all of the times the customer has reached the contact center (including how they were routed through the system, who they spoke to or emailed, and so on).

Assigning a contact means that, when the customer reaches the contact center, the customer's email address or phone number is *linked* to the same phone number or email address in the list of contacts.

When IM is able to link the email or phone number of the current customer (the current interaction) to an email or phone number in a Contact record, we say a contact has been *assigned* to the current interaction.

Assigning a contact record to the current interaction makes some important things happen:

- You will see the customer's name appear in the Banner area (Figure 86):

Figure 86. Banner Display After Assigning a Contact

NOTE: If a contact is not assigned to the current interaction, the first name, last name, and company fields are blank.

- The History tab (Figure 87) shows all of the customer's previous history with the contact center (including Notes).

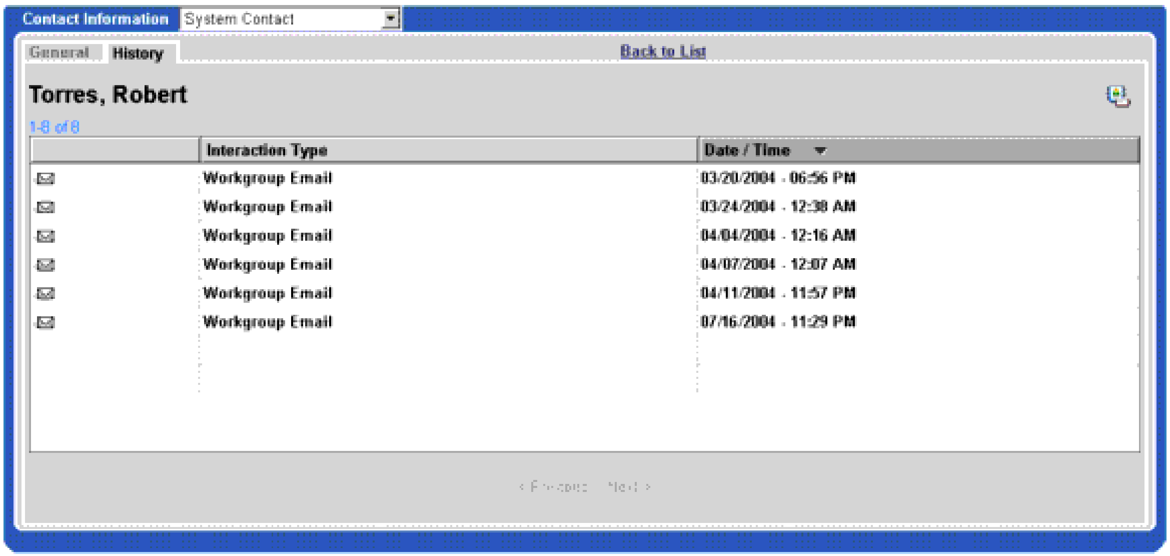


Figure 87. Contact History Shows All Previous Interaction Records

- When the interaction ends, CCA automatically appends a new interaction record is to the customer's Contact History.

  CAUTION: If the current interaction is never assigned to a contact record, you will never build up a history for that customer. You will never be able to know what happened with that customer on previous calls, emails, and so forth.

How Are Contacts Assigned?

Contact records can be assigned (linked) to the current interaction in two ways:

- **Auto-assignment.** If you already have a contact record for a customer and the customer reaches the contact center, IM attempts to take the customer's phone number or email address from the interaction and match it to a phone number or email address in the contact list. If a match is made, CCA automatically assigns the contact record to the current interaction.
- **Manual assignment.** If a customer reaches the contact center and there is no contact record for them, you can create a contact record while you work with the customer, and manually assign the new contact record to the current interaction.

To manually assign a contact to the current interaction

1 Accept the interaction.

2 Create a new contact record.

TIP: See the instructions beginning with “To create a new contact record” on page 99 to learn how to create contacts.

CAUTION: The phone number and email of the contact that you create **MUST MATCH** the phone number and email for the current interaction! For example, if the email for the customer in the current interaction is *sda@entprise.com* and their phone number is *5551212*, enter *sda@entprise.com* in the Email field of the contact and *5551212* in one of the phone fields (such as Work, Cell, or Home).

3 View the contact that you just created. Figure 88 shows an example.

TIP: See “Viewing a Contact” on page 104.

Figure 88. Example Contact General Information Screen

4 In the General contact screen, click the Assign Contact icon.

If CCA successfully assigns the contact to the current interaction, the customer’s first name, last name, and company appear in the Banner area (Figure 89) at the top of the IM screen.

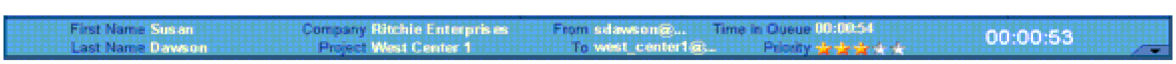


Figure 89. Banner Display After Assigning a Contact

Viewing Contact History

Every time a customer reaches the contact center, some information about the customer’s progress through the contact center is recorded, such as:

- The project and workgroup to which the customer was routed.
- The agent who was offered and accepted the interaction.
- Whether the customer was transferred and to whom.
- Other information.

To view contact history for the current interaction

If you are *currently handling* an Interaction, view the details of what has happened to the customer since they reached the contact center by following these steps:

1. Select the Call Control tab, and click the Interaction History button from the Interaction Controls area. Figure 90 shows an example of the interaction history for a current interaction.

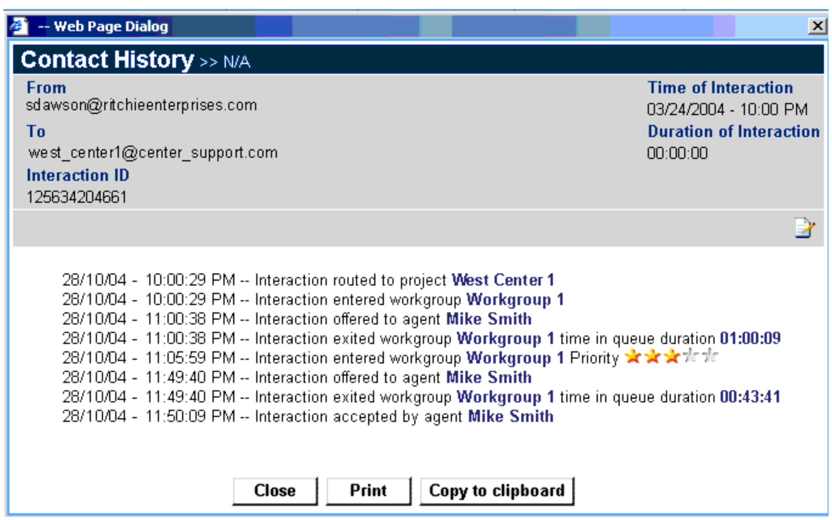


Figure 90. Example Interaction History For Current Interaction

- If the current interaction was assigned to a contact, when the interaction ends, CCA permanently saves the Interaction History and appends it to the contact.

  TIP: See "Assigning Contacts - An Overview" on page 106.

- If the current Interaction was not assigned to a contact, the information in the Interaction History is lost when the interaction ends.

  CAUTION: If this happens frequently, you will never build up a history for your customers, and you could lose valuable information about their past experiences with your contact center.

About Interaction History

Interaction history is appended to the contact as an *Interaction Record*. This means, at any time, you can view all of a contact's interaction records (their complete history with your contact center).

For example:

A new customer reaches your contact center (by email, phone, or other means) and you accept the interaction. Since the customer has never contacted your contact center before, you create a new contact record for them and manually assign the contact to the current interaction.

See “To create a new contact record” on page 99 and “To manually assign a contact to the current interaction” on page 107.

While you are working with the customer, IM continues to record how long the interaction is taking and other information. When you end the interaction, the system saves the interaction History and appends it to the contact. The contact now has one interaction record.

A few days later, the same customer reaches the contact center. This time, since IM already has a contact record for the customer (with their email address and phone number), CCA auto-assigns the contact record to the customer. Now, when you end the interaction, CCA saves the Interaction History as a new interaction record and attaches it to the contact. The contact now has two separate interaction records associated with them.

To view a contact’s history (interaction records)

1. Find the contact.

   TIP: To learn how to search for contacts, see “To quickly find all contacts in a contact list” on page 102,

2. View the Contact History.

   TIP: See “Viewing Contact History” on page 108.

3 Double-click a record. Figure 93 shows an example.

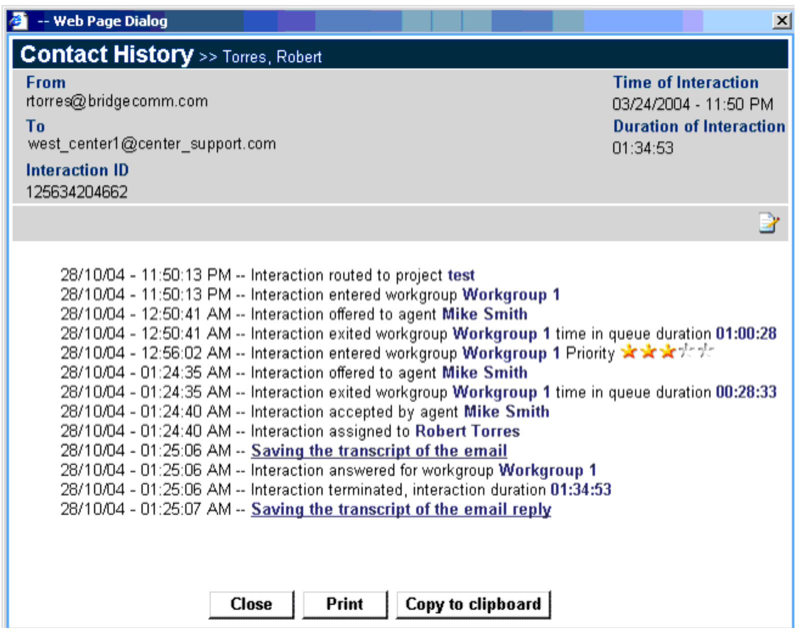


Figure 91. Example Interaction Record

To print an interaction history record

1 Find the contact.

TIP: To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102.

2 View the Contact History.

TIP: See "Viewing Contact History" on page 108.

3 Double-click the interaction record, and click Copy to Clipboard.

4 You can now paste the contents of the clipboard into any text or word processing document.

Listening to a Recorded Interaction

You can use IM to record your phone interactions and listen to the recording later.

TIP: See "Recording a Caller" on page 71.

To listen to a recorded interaction

1 Find the contact.

> **TIP:** To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102.

2 View the Contact History.

TIP: See "Viewing Contact History" on page 108.

3 Double-click the interaction that contains the recording.

The Contact History dialog box (Figure 92) opens.

History Recording Stopped Link

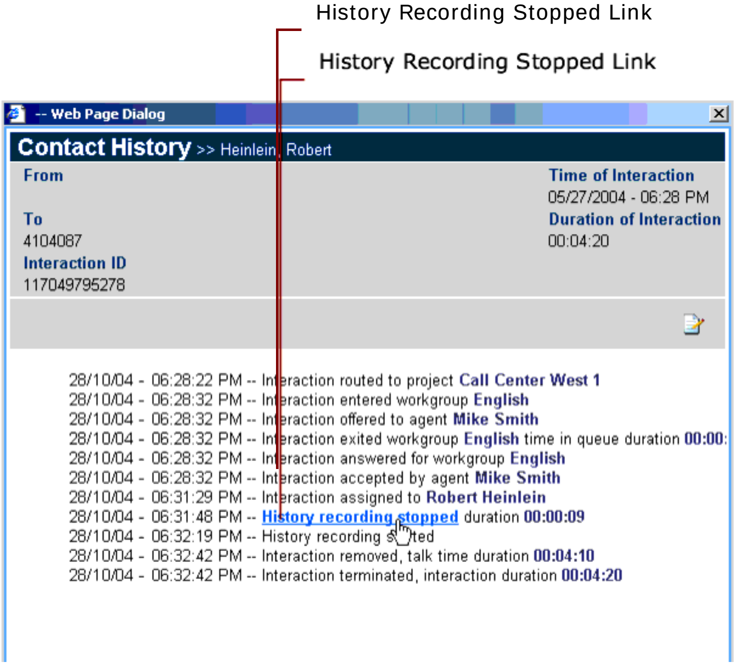


Figure 92. Contact History - Showing a Recording

4 Click the History Recording Stopped hyperlink.

The recorded interaction opens in your music player software and begins to play.

Adding Notes

Although IM automatically records Interaction History (time in queue, transfers, agent's name, and so forth) there are times when you want to add some information about the customer (such as problems they have had, their previous questions, or technical notes).

IM has two types of Notes:

- You can add a note to an interaction.

  For example, you can record information that was specific to one Interaction (such as a complaint that a customer had on a particular day).

  Interaction Notes appear as hyperlinks inside an Interaction Record.

  TIP: See "To view a contact's history (interaction records)" on page 110 to learn more about Interaction Records.

- You can add a note to a contact.

  For example, you can attach a more general note to a contact (such as noting the type of equipment the customer uses).

  Contact notes appear in the Contact's History tab.

Adding a Note to an Interaction

- You can add a note to the current Interaction History.

  NOTE: The current Interaction History is information recorded while you are working with a customer.

- You can add a note to an existing Interaction Record.

  If the interaction was assigned to a contact, CCA saves the Interaction History as an Interaction Record and appends it to that contact.

  TIP: See "Assigning Contacts - An Overview" on page 106.

To add a note to the current interaction

1 Select the Call Control tab, and click the Interaction History button from the Interaction Controls area.

The Interaction History for the current interaction appears (Figure 93).

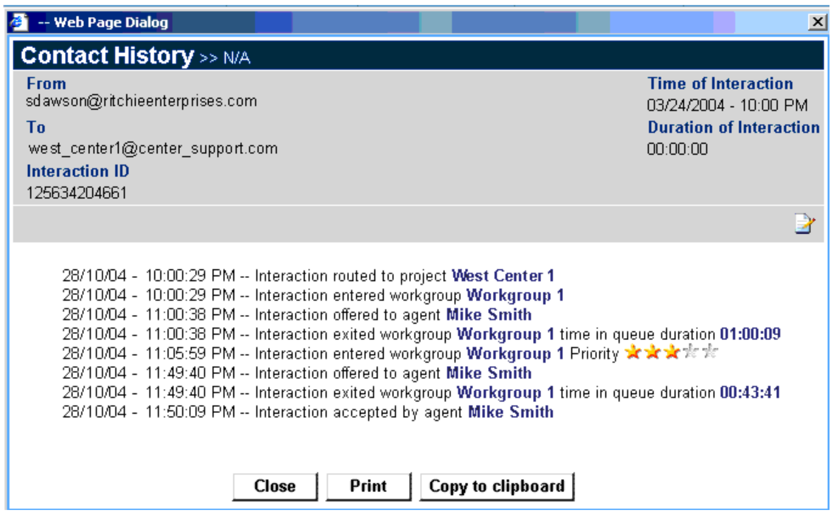


Figure 93. Example Interaction History for Current Interaction

2 Click the Write Note icon.

The Note dialog box opens (Figure 94).

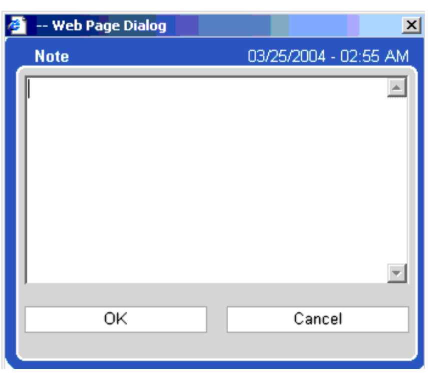


Figure 94. Note Dialog Box

3 Enter your Note text, and click OK.

To view a note attached to the current interaction history

1 From Call Control, click Interaction History (located in the Interaction Controls area).

NOTE: If the Interaction History window was open when you created the note, you must close and re-open the Interaction History window.

A hyperlink to your note (Figure 95) appears as an entry in the Interaction History.

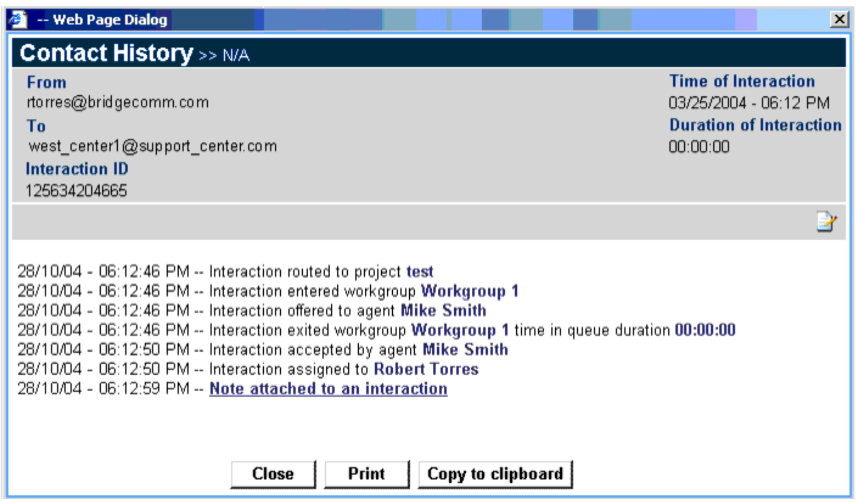


Figure 95. Note Link in Interaction History

2 Click the Note hyperlink.

A window appears showing the contents of the note.

NOTE: You cannot edit an existing note. To change the information, you must create a new note.

To add a note to an existing interaction record

1 Find the contact.

TIP: To learn how to search for contacts, see “To quickly find all contacts in a contact list” on page 102.

2 View the Contact History.

TIP: See “To view a contact's history (interaction records)” on page 110.

3 Double-click on an interaction record to open it.

4 Click the Write Note icon.

The Note dialog box appears (Figure 94 on page 114).

5 Enter your note text and click OK.

To view a note attached to an existing interaction

1 Find the contact.

TIP: To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102.

2 View the Contact History.

TIP: See "To view a contact's history (interaction records)" on page 110.

3 Double-click on an interaction record to open it.

A hyperlink to your note (Figure 94 on page 114) appears as an entry in the interaction record.

4 Click the note hyperlink.

A window appears showing the contents of your note.

NOTE: You cannot edit an existing note. To change the information, you must create a new note.

To add a note to a contact

1 Find the contact.

TIP: To learn how to search for contacts, see "To quickly find all contacts in a contact list" on page 102.

2 Do one of the following:

- If you are looking at a list of contacts, right-click on the contact, and choose Contact History from the pop-up menu (Figure 96).

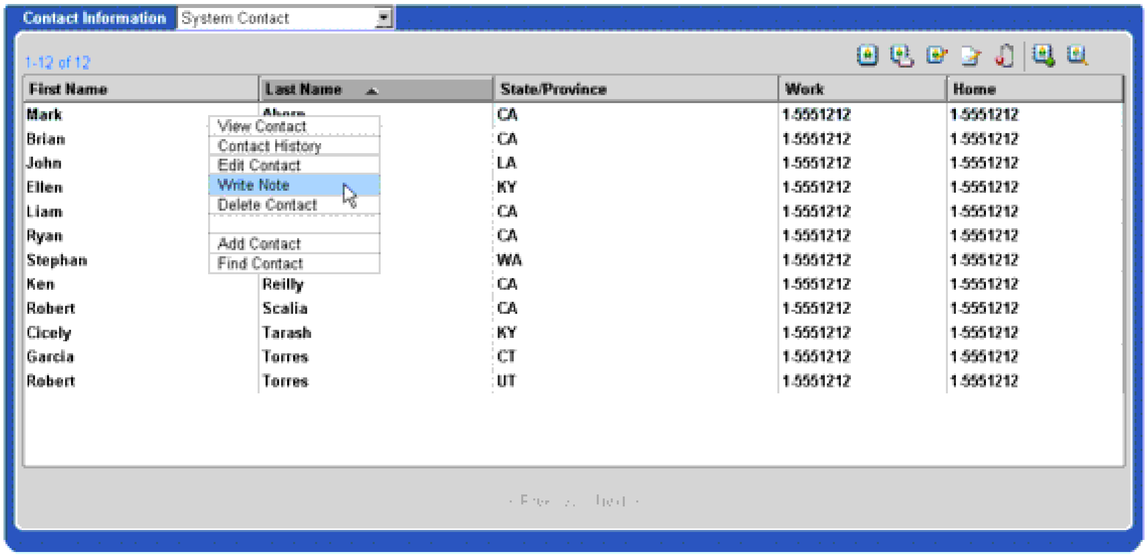


Figure 96. Select Contact History

- If you are looking at a single contact record, click the Write Note icon, enter your note, and click OK.

To view a note attached to a contact

1. Find the contact.

   TIP: To learn how to search for contacts, see “To quickly find all contacts in a contact list” on page 102.

2. View the Contact History. Any notes that were attached to the contact appear in the History tab.

   TIP: See “To view a contact’s history (interaction records)” on page 110.

3. Double-click on the note to view.

   A window appears showing the contents of the note.

   NOTE: You cannot edit an existing note. To change the information, you must create a new note.

Communicating With a Contact

Use the IM Contact Screen to quickly place a call, email, or fax to any customer who has a contact record.

To communicate with a contact

1. Find the contact.

   TIP: To learn how to search for contacts, see “To quickly find all contacts in a contact list” on page 102.

2 View the Contact record (Figure 97).

Figure 97. Example Contact Record

NOTE: Because your administrator can customize the Contact Record screen, your screen may look different from the example shown in Figure 97

3 Click one of the hyperlinks in the Contact Record screen. Table 10 shows the different hyperlinks and describes what they do when clicked.

NOTE: If your administrator customized your Contact Record Screen, you may not see all of the fields described in Table 10.

Table 10. Contact Record Hyperlinks

Hyperlink	Action
Work	Dials the contact's work phone number
Fax	Allows you to select a fax, a project for billing the interaction, and dials the contact's fax number. **TIP:** See "To send a fax to a customer" on page 119 for more information.
Cell	Dials the contact's cellular number.
Home	Dials the contact's Home Phone number.
Email	If you have told IM about the mail program that you use, IM opens a new email message and places the customer's email address in the *To:* field. The return address on the email is the address you configured as your return address in your Email Client program (not your CCA email address).
Home Page	Launches a Web browser and opens the Web page identified in the hyperlink.

Sending an Email to a Customer

In a Contact Record Screen (Figure 92 on page 112), click the Email hyperlink. An email program automatically opens with a new message, with the customer's email address in the *To:* field.

NOTE: The return address on the email is your address, as configured in your Email client program (not your CCA email address).

The email application launched by the Send Email button may not be the same email application configured in your IM for handling email interactions.

TIP: See "Identifying How to be Notified (for New Interactions)" on page 31.

It is important to note that when you send an email message to a customer using the Send Email button on the Contact screen:

- CCA does not track these messages.
- You cannot view these messages later in the History screen.

NOTE: To keep a record of email messages you send to customers, use the Call Control screen to accept and respond to email interactions.

TIP: See "Responding to an Email Interaction" on page 86.

To send a fax to a customer

1 In a Contact Record screen (Figure 92 on page 112), click the customer's fax number hyperlink.

The Select a Fax dialog box (Figure 98) appears.

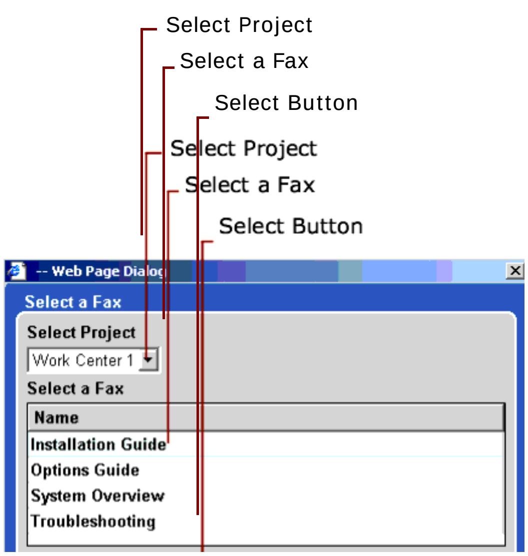


Figure 98. Select a Fax Dialog Box

2 From the Select Project drop-down list, select the project to which the interaction will be billed.

3 From the Select a Fax list, double-click the fax to send to the customer. IM dials the number and sends the Fax.

NOTE: If you don't see a list of projects and faxes in the dialog box, they may not have been configured. Contact your administrator.

11 Managing Tasks

This chapter describes how to manage tasks such as To Do lists, events, meetings, reminders, and appointments. It includes the following topics:

- About the Task Screen
- Creating a New Task
- Viewing Your Task List
- Editing a Task
- Deleting a Task

About the Task Screen

In Interaction Manager, the Task screen (Figure 99) provides a task list area and a calendar, which you can view by day, week, or month.

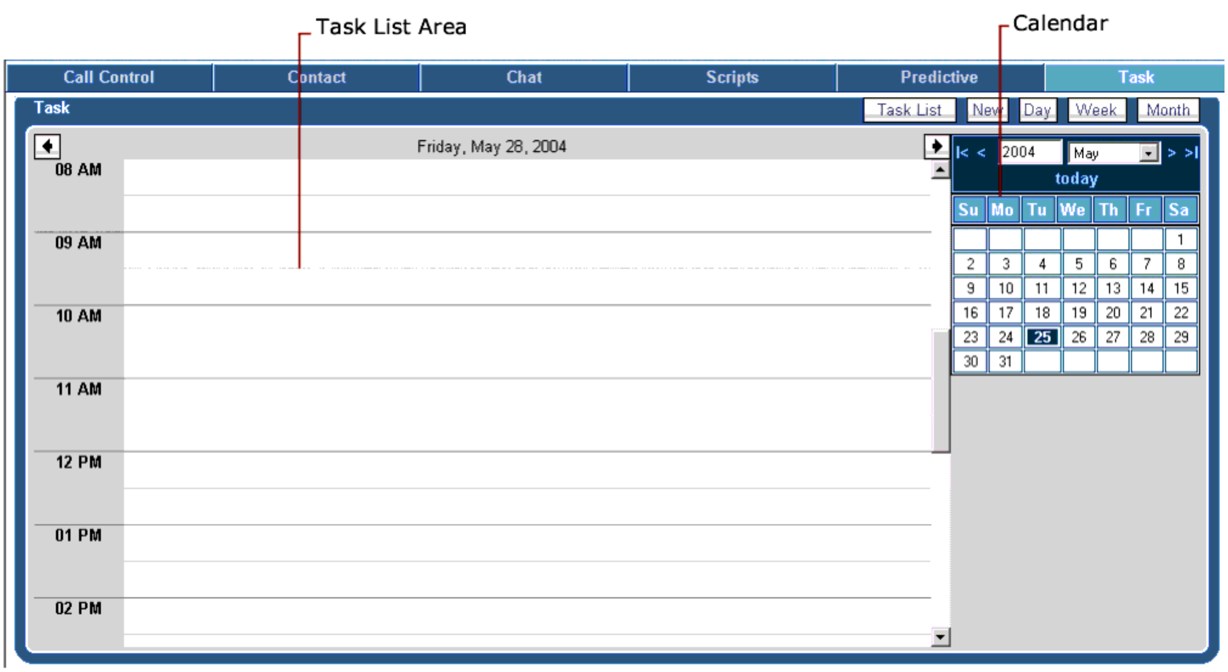


Figure 99. Task Screen

From the Task screen, you can:

- Organize your To Do lists, events, meetings, reminders, and appointments.

- Dial, email, or fax contacts with a simple click.

To navigate within your Task screen

1. Select the Task tab, and then select one of the following Task buttons (Figure 100), located above the calendar, to change the Task view to match your selection.

Figure 100.Task Buttons

- Click Day to change the Task view to a single day, in hourly increments from 12AM to 11PM (Figure 101). Click the left arrow button to show the previous day. Click the right arrow button to show the next day.

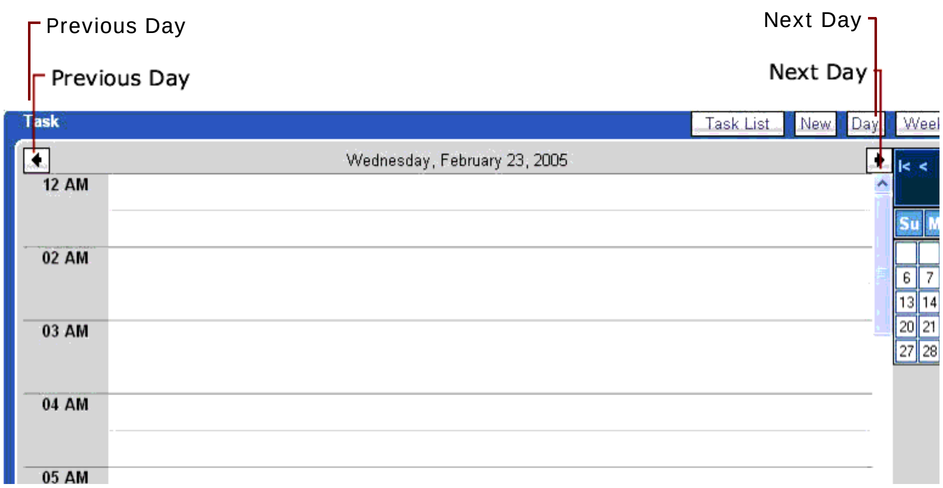


Figure 101.Task View - Day

- Click Week to change the Task view to an entire week (Figure 102). Click the left arrow button to show the previous week. Click the right arrow button to show the next week.

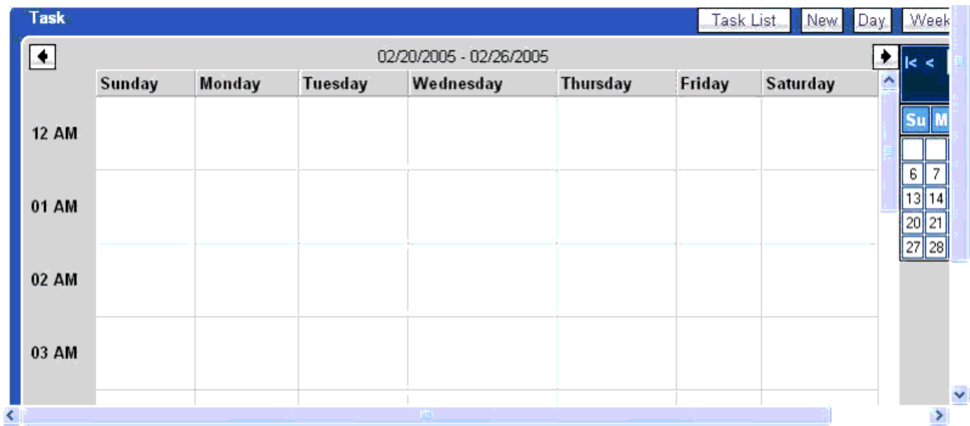


Figure 102. Task View - Week

- Click Month to change the Task view to an entire month (Figure 103). Click the left arrow button to show the previous month. Click the right arrow button to show the next month.

Figure 103. Task View - Month

To navigate using the task calendar

1 Select the Task tab and do the following within the Task Calendar (Figure 104):

- Change months by making a selection from the drop-down list, or by clicking the inner most left arrow (for the previous month) or the inner most right arrow (for the next month).
- Change years by clicking the outer most left arrow (for the previous year) or the outer most right arrow (for the next year).
- Change to a different day by clicking a date button.

- Return to the current day by clicking the Today icon.

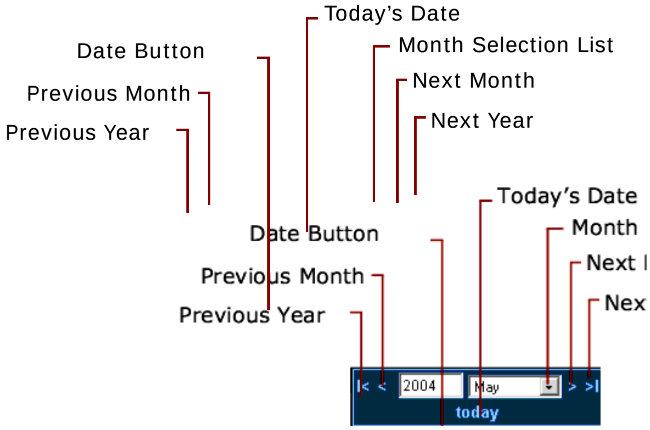


Figure 104.Task Calendar

Creating a New Task

You can create a new task.

To create an new task

1 In the Task screen calendar, click the day when you want to create the task.

   The Task View area changes to show the day you selected, in hourly increments from 12AM to 11PM.

2 Double-click the time when you want the task to begin (Figure 105).

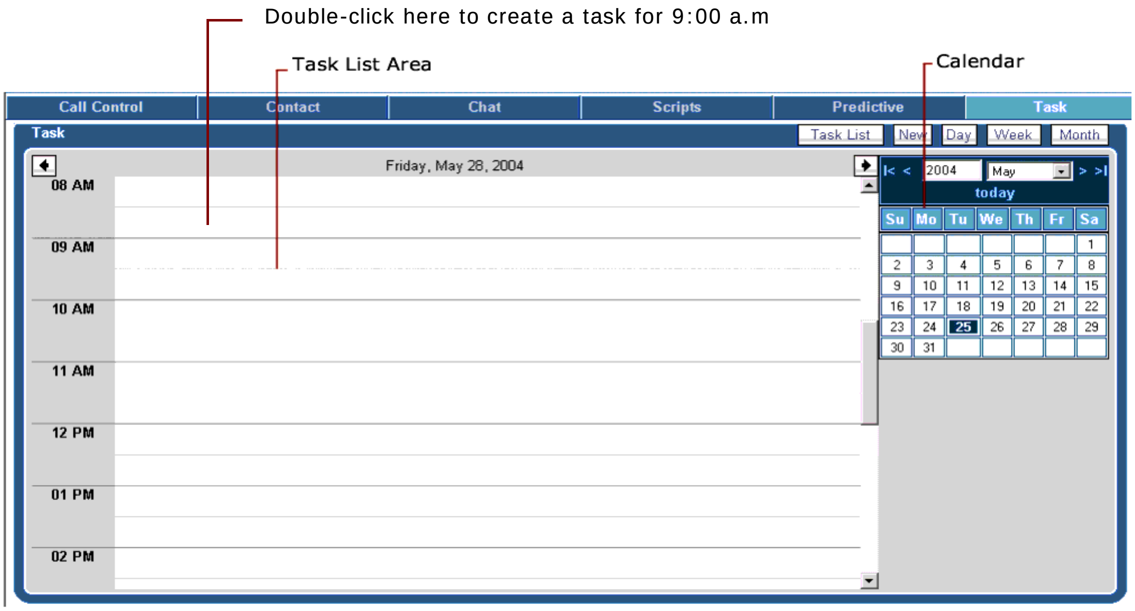


Figure 105.Double-Click a Starting Task Time

The Task Dialog Box (Figure 106) opens.

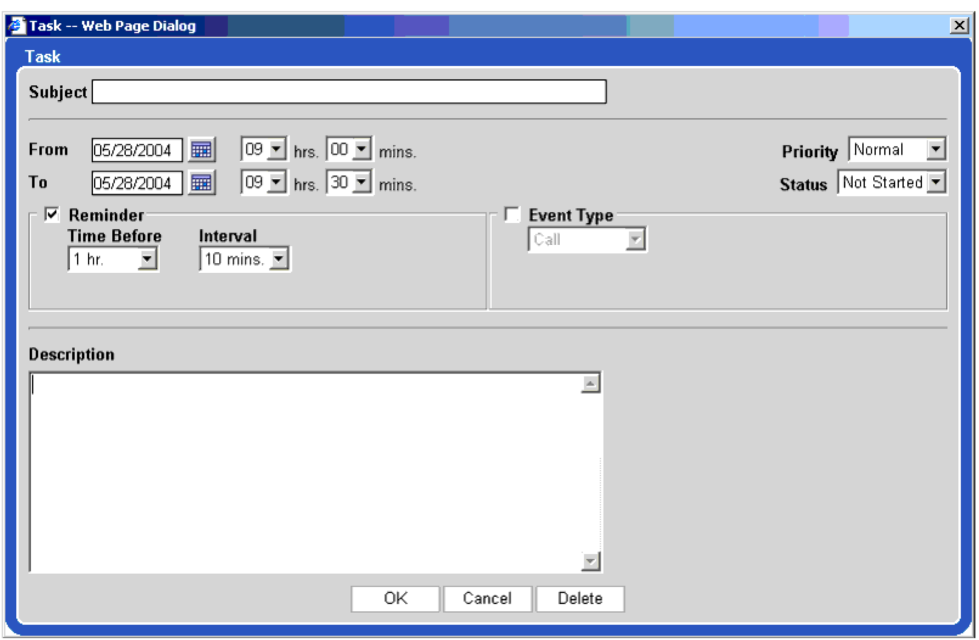


Figure 106.Task Dialog Box

3 Type a Subject for the task (such as *Staff Meeting*).

The subject appears on your calender.

4 Click the From and To areas to change the date of the task.

A calendar opens for you to make a selection.

TIP: For how to select a to and from date, see "To navigate using the task calendar" on page 123.

5 From the hour and minutes drop-down lists, select how long the task will last.

6 If you want, click the Reminder check box to have a message box pop-up on your computer screen as a reminder of the task, and then:

a From the Time Before drop-down list, select when you want the system to send you the first reminder (such as 5 mins. before the task begins).

b From the Interval drop-down list, select how often you want the system to send you the reminder before the task begins (such as every 5 mins., 10 mins., ... 1 hr.).

7 Click the Event Type check box to access additional selections (Figure 107), and then make a selection from the drop-down list:

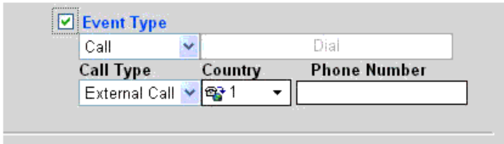


Figure 107.Event Type Selections

- If you select a Call event type, you must also select a call type (from External, Internal, PBX, or IP), a county (from the drop-down lists), and enter the phone number.
- If you select an Email event type, you must also type an email address.
- If you select a Fax event type, you must also select a country (from the drop-down list), and enter the fax number.

8 Select a priority from the drop-down list.

> **NOTE:** Choosing a priority adds a color code (Figure 108) to the task on your calendar.

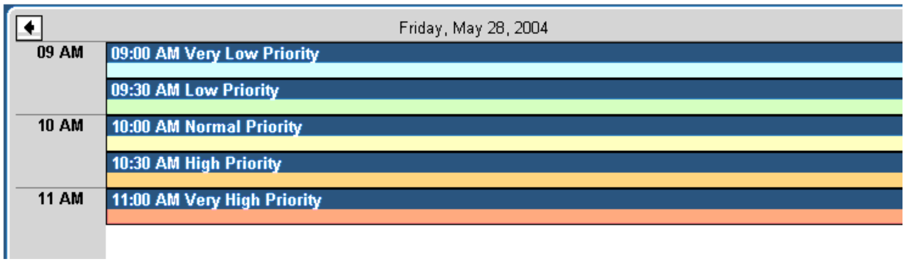


Figure 108.Task Priority Color Codes

Table 11 shows each priority color code and its corresponding priority level.

Table 11. Task Priority Color Codes

Priority Level	Color
Very Low Priority	Blue
Low Priority	Green
Normal Priority	Yellow
High Priority	Orange
Very High Priority	Red

a From the Status drop-down list, select Not Started, Started, Completed, or Waiting.

b In the Description box, type a description of the Task.

9 Click OK. The Task appears in the Task View area and a reminder (Figure 109), if you selected one, appears at the time(s) you indicated.

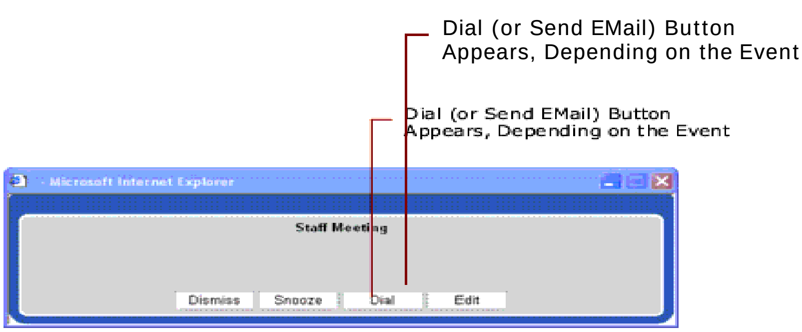


Figure 109.Example Reminder Notification

When you click Dial or Email (in the Reminder), IM dials the number for you or opens an email message that is already addressed.

To create a new task another way

1. If you are looking at the week or month view, double-click any day, and the New Task dialog box appears.
2. No matter how you are viewing your calendar (day, week, or month), click New at any time to create a new Task.

Viewing Your Task List

You can view your list of tasks, task start and end dates, task statuses, and task priority rating numbers.

To view your task list

1. In the Task screen (Figure 110), click Task List.

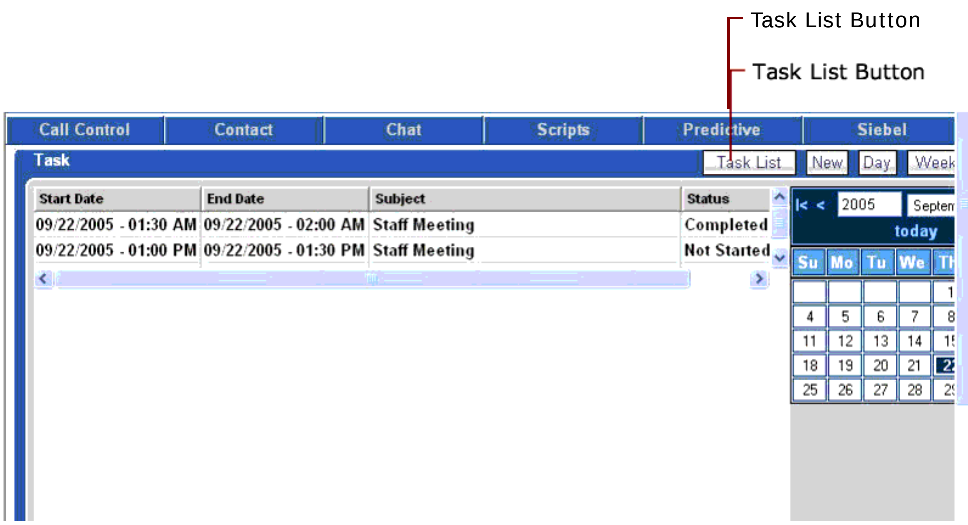


Figure 110.Viewing Your Task List

The Task View area changes to show a list of tasks. Each task also shows the start date, end date, subject, status, and priority rating number.

2. Double-click any task to open the Task dialog box (Figure 106 on page 125) for that task.

Editing a Task

You can edit a task whether you know the day on which the task occurs or not.

To edit a task when you know the day on which the task occurs

1. Double-click the task.

2 The Task dialog box opens (Figure 106 on page 125).

3 Change the Task information.

TIP: Refer to "Creating a New Task" on page 124.

To edit a task when you do not know the day on which the task occurs

1 Click Task List.

All of the Tasks that you have created appear.

2 Double-click any task.

The Task dialog box opens (Figure 106 on page 125).

3 Change task information.

TIP: Refer to "Creating a New Task" on page 124.

Deleting a Task

You can delete a task whether you know the day on which the task occurs or not.

To delete a task when you know the day on which the task occurs

1 Double-click the Task.

The Task dialog box opens (Figure 106 on page 125).

2 In the Task dialog box, click Delete.

3 Click OK to confirm the deletion.

To delete a task when you do not know the day on which the task occurs

1 Click Task List.

All of the tasks that you have created appears(Figure 110 on page 128).

2 Right-click on any task, and choose Delete from the pop-up menu.

3 Click OK to confirm the deletion.

12 Offline Activities

This chapter discusses miscellaneous tasks that you can perform with IM, such as Viewing Real-Time Statistics, Wrapping Up, Controlling Your Status, Managing Missed Calls and Voicemail Messages, and Creating a Scheduled Conference. It includes the following topics:

Viewing Real-Time Statistics

Use the My Statistics button (Figure 111) in the Call Control tab (Personal Options area) to see real-time statistics on:

- How many Interactions you have handled since 12:00 AM (midnight) today.
- How quickly (on average) you accepted Interactions that were offered to you since 12:00 AM (midnight) today.

- How long you have been logged in and how much you have spent being *Busy*, *Available*, or *On Break* since 12:00 AM (midnight) today.

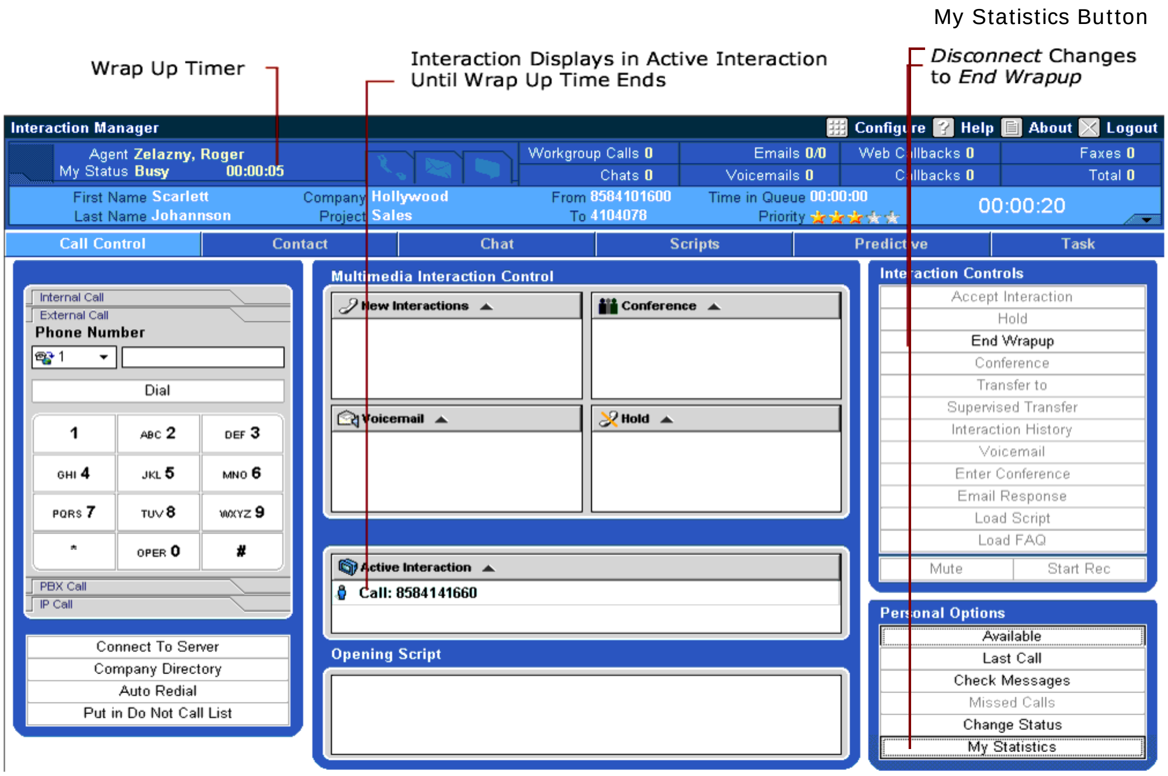


Figure 111.My Statistics Button

To view My Statistics

1 Click My Statistics in the Call Control tab (in the Personal Options area).

The My Statistics dialog box opens. Figure 112 shows an example display.

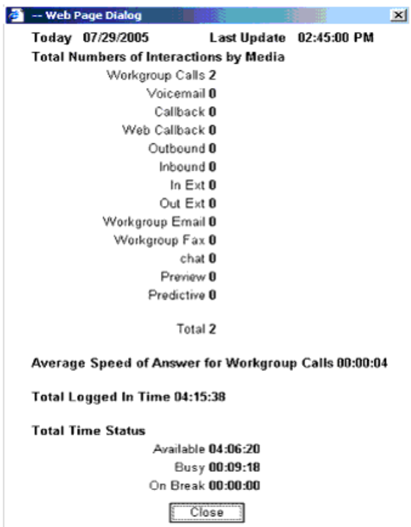


Figure 112.Example My Statistics Display

2 Use the information in Table 12 to understand each field in the My Statistics display.

Table 12. My Statistics Fields and Meanings

Field	Description
Total Number of Interactions by Media	These statistics tell you how many interactions of different types you have accepted since 12:00 AM today. For example, if *Web Callback* shows *4*, it means that you have accepted four Web callback interactions since 12:00 AM today.
Average Speed of Answer for Interactions	When the system offers you an interaction (the interaction appears in the New Interaction area) a timer starts. When you accept the interaction, the timer stops. This statistic shows how quickly, on average, you accepted interactions since 12:00 AM today.
Total Logged In Time	The total amount of time that you were logged into IM since 12:00 AM today. **NOTE:** This timer starts when you login and stops when you logout. It is reset every day at Midnight.
Total Time Status	The total amount of time that you spent being *Available*, *Busy*, or *On Break* since 12:00 AM today.

3 When finished, click Close.

Wrapping Up an Interaction

Wrap up is the time after an interaction ends when you can take care of different tasks. For example, after an interaction ends, your supervisor may want you to fill out a form or make sure that there is a contact record for your most current customer.

NOTE: Your administrator can configure the system to give you a specific amount of wrap up time after each interaction to take care of various tasks.

- Since wrap up time is optional, ask your supervisor or administrator if your contact center uses wrap-up time and how much time you have.

  NOTE: Wrap up time does not apply to Outbound Calls.

- Your status remains *Busy* while you are in wrap up. When wrap up ends, CCA automatically changes your status back to *Available*.

To wrap up an interaction

1. Either you or the customer will end the interaction.
2. If you contact center uses outcomes, select an outcome, and then click Select.

   TIP: Refer top "Assigning Outcomes" on page 75.

What Happens During Wrap Up?

1. A timer appears next to your status in the banner area.

   The timer starts when the interaction ends or immediately after you select an outcome. The timer starts at zero and counts up.

2. The interaction displays in the Active Interaction area until wrap up ends.
3. The Disconnect button changes to End Wrap Up.

   You can end the wrap up time right away by clicking End Wrap Up. Your status returns to *Available*. Otherwise, wrap up ends when you reach the amount of time set by your administrator.

NOTE: While you are in wrap up, you can still select Available and accept another interaction. Both interactions appear in the Active Interaction area until wrap up time ends for the first interaction.

Figure 113 shows the Call Control Screen during wrap up.

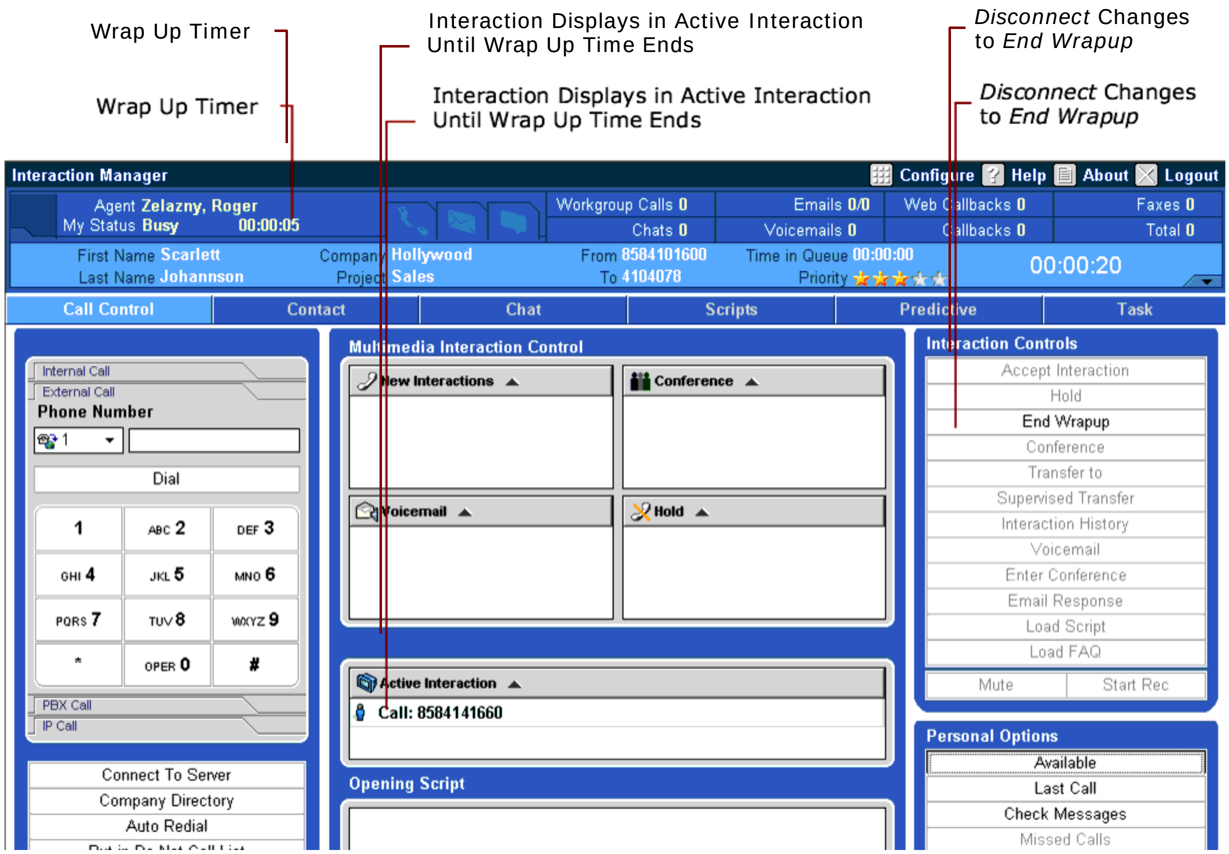


Figure 113.Call Control Screen During Wrap Up

Controlling Your Status

IM lets you control your availability to accept or refuse incoming interactions. For example, if you need to leave your station for lunch, a break, or if you need time after a recently concluded interaction, you can make yourself temporarily unavailable for new interactions.

You can also change your status to available after accepting one interaction, so that CCA will automatically route a new interaction to you (allowing you to handle multiple interactions).

NOTE: CCA only routes calls to agents who are *available*.

You can control your status in three ways:

- Select the Available button to immediately change your status to available.
- Select the Last Call button to tell the system not to give you any more calls.
- Select the Change Status button to select a custom status that has been created for your contact center.

When to Use the Available Button

Generally, your status automatically returns to available when you finish an interaction. But there are some times when you may want to select the Available button and manually change your status. For example, if you are away from your desk and your status is available, the system may offer you a call.

NOTE: If you do not accept the call (because you are away), the system offers the call to another agent and changes your status to No Answer.

When you get back to your desk, you must select available to let the system know you are ready to accept interactions.

- Another way to handle this situation would be to use the Change Status button.

  TIP: Refer to "To select a custom status" on page 137.

- You can also select Available if you want to handle more than one phone interaction at the same time.

TIP: Refer to "Accepting Multiple Phone Interactions" on page 59.

When To Use the Last Call Button

While you are on a call and when you know you need to stop taking any new calls after this one, select Last Call. This way CCA will not send you another call after you hang up. You may want to do this, for example, if your supervisor asks you to come to her office after your current call. Another example would be when you know your lunch shift starts at precisely 12:15 P.M. and it is 12:14:45 P.M. You do not want to take another call, so select Last Call. That way you will not miss your lunch break.

- If you are not handling an interaction at the time you select Last Call, CCA will not offer you an interaction until you change your status back to available.
- If you are handling an interaction when you select Last Call, complete the interaction and leave your workstation. CCA will not offer you another call until you select Last Call again.

When to Select a Custom Status

Your administrator can create custom statuses for your contact center, such as *Internal Meeting*, *Training*, and so forth. Custom statuses allow you to be more specific about what you are doing. However, no matter what the custom status displays, your status to CCA is always one of the following:

- **Available.** You are ready to accept interactions.
- **Busy.** You are not available to take interactions.
- **On Break.** You are not available to take interactions.

  NOTE: You may see a No Answer status if you did not accept a workgroup interaction within the time limit. (No Answer is the same as On Break.)

To select a custom status

1 Click the Call Control tab, and click Change Status (Figure 114), located in the Personal Options area.

Change Status Button

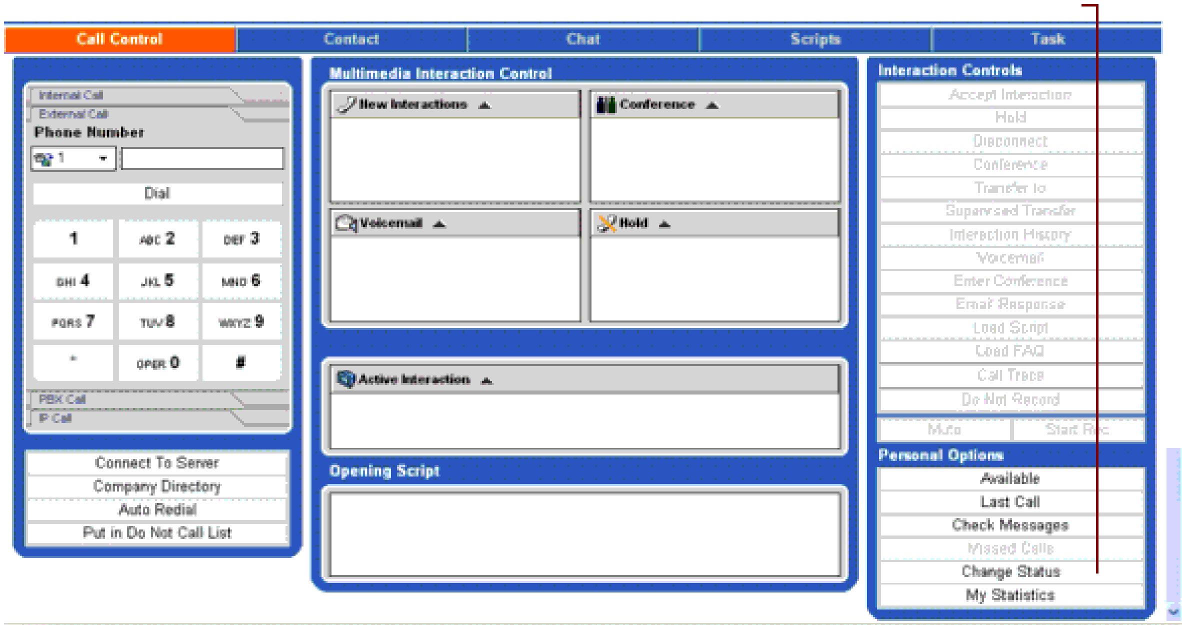


Figure 114.Change Status Button

The Status List dialog box (Figure 115) appears, showing all of the custom statuses created by your administrator.

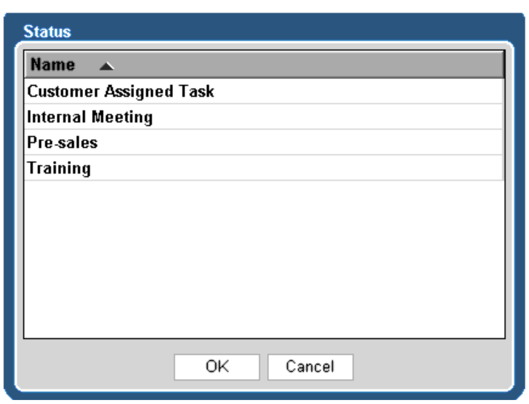


Figure 115.Status List Dialog Box

2 Double-click a status from the list. Your new status appears on the Information Bar.

NOTE: Your supervisor can also see your new status.

Managing Missed Calls and Voicemail Messages

If someone calls you while you are away from your desk, and they hang up without leaving a voicemail message, use the Missed Calls feature to find their phone number and the time when they called. You can also use this feature for a missed call on your non-ACD line.

If someone calls you while you are away from your desk, and they leave a voicemail message, use Interaction Manager to retrieve the voicemail.

There are two types of voicemail messages:

- ACD voicemail messages

  When the customer dialed the number of your contact center and was routed to you. If you are unable to take the call, the customer can leave a voicemail message for you.

- Non-ACD voicemail messages

  When the caller dialed your phone number directly. If you are unable to take the call, they can leave a voicemail message for you.

  TIP: See Chapter 5, “Handling Phone Interactions” for more information on the difference between ACD and non-ACD calls.

You can also access your voicemail messages:

- While you are logged into IM
- By dialing into the system from any phone

What to Know Before Retrieving Voicemail Messages

Before you can retrieve your voicemail messages:

1. You may need to configure your email client.

   TIP: Refer to “Identifying How to be Notified (for New Interactions)” on page 31.

2. You may need to add audio software on your computer so that you can listen to the voicemail.

   NOTE: This chapter describes what the CCA software *can* do. However, not all of these features may be enabled at your site. Please see your supervisor or administrator if you are not sure which features your site uses.

Retrieving Voicemail Messages From Interaction Manager

If the Check Messages button in the Call Control tab is red, it means someone called your phone number directly and left a voicemail message for you.

To retrieve non-ACD voicemail messages from IM

1. Click the Call Control tab, and click the Check Messages button.

   Your email program opens showing a new email message in your inbox.

2. When you open the new email message, you will find the voicemail message as an attachment.
3. In most email programs, double-click on a sound file attachment and your sound player automatically opens.

Retrieving ACD Voicemail Messages From IM

If when you login a voicemail message appears as an interaction, it means someone dialed the number of your contact center, was routed to your phone, and left a voicemail message for you.

Use email or your phone to retrieve ACD voicemails.

NOTE: Ask your supervisor or administrator if you aren't sure which method works with your system.

To retrieve ACD voicemail messages using your email program

1. Accept the voicemail interaction.

   Your email client opens showing a new email message in your inbox.

2. Open the new email message and you will find that the voicemail message is included as an attachment.
3. In most email programs, double-click on the sound file attachment and your sound player program automatically opens.

To retrieve ACD voicemail messages using your phone

1. Accept the voicemail interaction.

   Your phone rings.

2. Answer your phone and listen to a menu of options.
3. Select the option to play your voicemail messages.

Retrieving Voicemail Messages from a Remote Phone

If you are away from your IM workstation, you can still retrieve voicemail messages using a *remote* phone. By remote phone, we usually mean a phone that is outside of your company, such as your home phone, cell phone, or a phone that you use while you are travelling.

You cannot, however, retrieve voicemail messages if your email program is running and is set to remove your email messages from the email server.

If you plan to retrieve voicemail message remotely, make sure you shut down your email program before leaving your workstation, or configure your email program so that it leaves a copy of your email messages on the email server.

NOTE: Your administrator must configure a project that uses the Mailbox Manager feature. See your supervisor or administrator for more information.

Retrieving Voicemail Messages Remotely

You can use your extension number or your Interaction Manager user name and password, if they consist only of numbers.

For example:

Extension: 789

User name: 12345

Password: 67890

The numbers can be anything that you want; something that is secure and which you can remember.

NOTE: Contact your administrator if you need to change your user name and password.

To retrieve non-ACD voicemail messages from a remote phone

A non-ACD voicemail occurs when someone calls your work number directly and leaves a message for you.

If you are not logged into IM and you want to dial into the system to get your non-ACD voicemail messages, then:

1. From any phone, dial the phone number for your project.

   NOTE: Ask your supervisor or administrator if you are not sure what number to dial.

2. Listen to the phone menu.

   The phone menu tells you which number to press to connect to the Mailbox Manager feature.

3. Press the number provided by the phone menu. The phone menu prompts you to enter your mailbox number.

   a. Instead of entering your mailbox number, enter your IM extension or user name.

      NOTE: Remember that for remote message retrieval, your user name must consist only of numbers.

   b. When you finish entering your extension or user name, press the pound (#) key.

   c. The menu prompts you for your password.

   d. Enter your IM password and press the pound (#) key.

      NOTE: Your password must consist only of numbers.

   e. Follow the instruction prompts to retrieve your voicemail messages.

Retrieving ACD Voicemail Messages From a Remote Phone

An ACD voicemail occurs when someone calls your company, gets routed to you, and then leaves a message for you.

Even when you are not logged into IM, you can dial into the system and get your ACD voicemail messages. However, this feature must be configured at your site by your administrator. Figure 116 shows an example of how ACD Voicemail retrieval works.

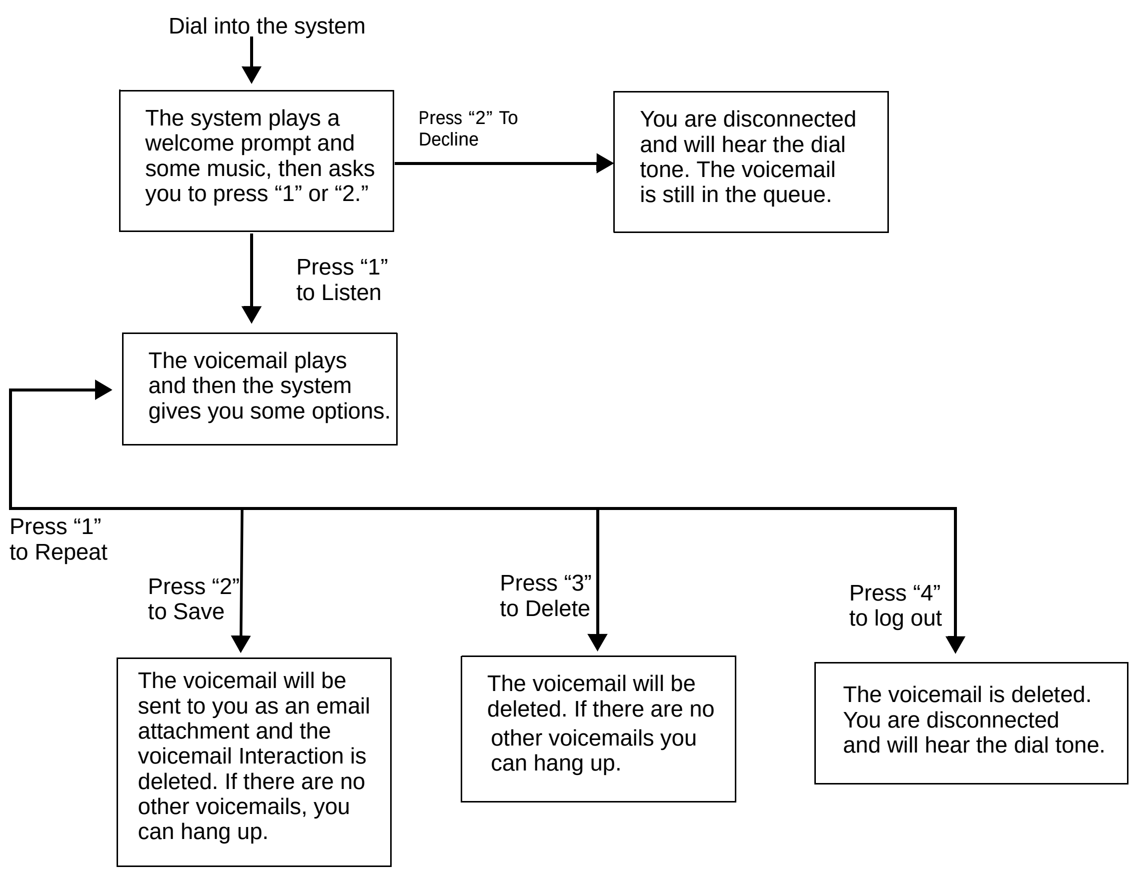


Figure 116.Remote Access to ACD Voicemail

NOTE: Ask your supervisor or administrator if this feature is available at your contact center.

To retrieve ACD voicemail messages from a remote phone

1. If the feature is available, ask your administrator or supervisor for the number to call from the remote phone.
2. Dial the number and go through a phone menu, if necessary. The system asks you to enter your user name and password, just as though you were logging in to IM.

   NOTE: Your user name and password must consist only of numbers, for example:

   User name: 007

   Password: 90210
3. Enter your user name and password.

   CCA gives you a few options, one of which is to listen to your ACD voicemail messages.

   NOTE: You maybe asked to press a key on your phone to retrieve your ACD voicemail messages.

Checking Missed Phone Calls

IM keeps track of all customer's phone numbers and the times when they tried to reach you, even if a customer reaches your voicemail and hangs up without leaving a message.

To retrieve customer phone number and call times

1. Click the Call Control tab.

   The Missed Calls button (in the Personal Options area) appears red, if anyone called for you while you were unavailable.

2 Click the Missed Calls button.

The Missed Calls dialog box (Figure 117) appears and shows you who called, when they called, and their phone number.

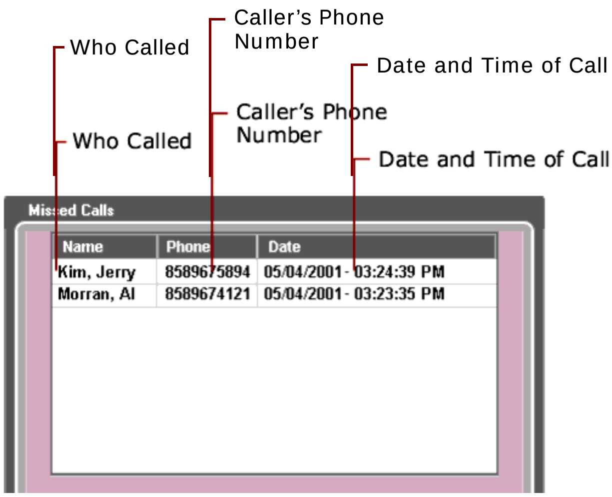


Figure 117. Missed Call Dialog Box

3 Do one of the following:

- Call the person back by selecting their name and clicking Dial.
- Remove a customer from the Missed Calls dialog box by selecting the customer and clicking Clear Selected.
- Remove all missed calls by selecting Clear All.

Creating a Scheduled Conference

Anyone with a CCA account can schedule a conference, after an administrator finishes the conferencing setup.

To create a scheduled conference

1 Ask your administrator what phone number to use for the conference call.

2 Start Internet Explorer and enter the Conference Web page address:

`http://`*`<web server host>`*`/taw/CreateConference/`

The Create Conference Web page (Figure 118) opens.

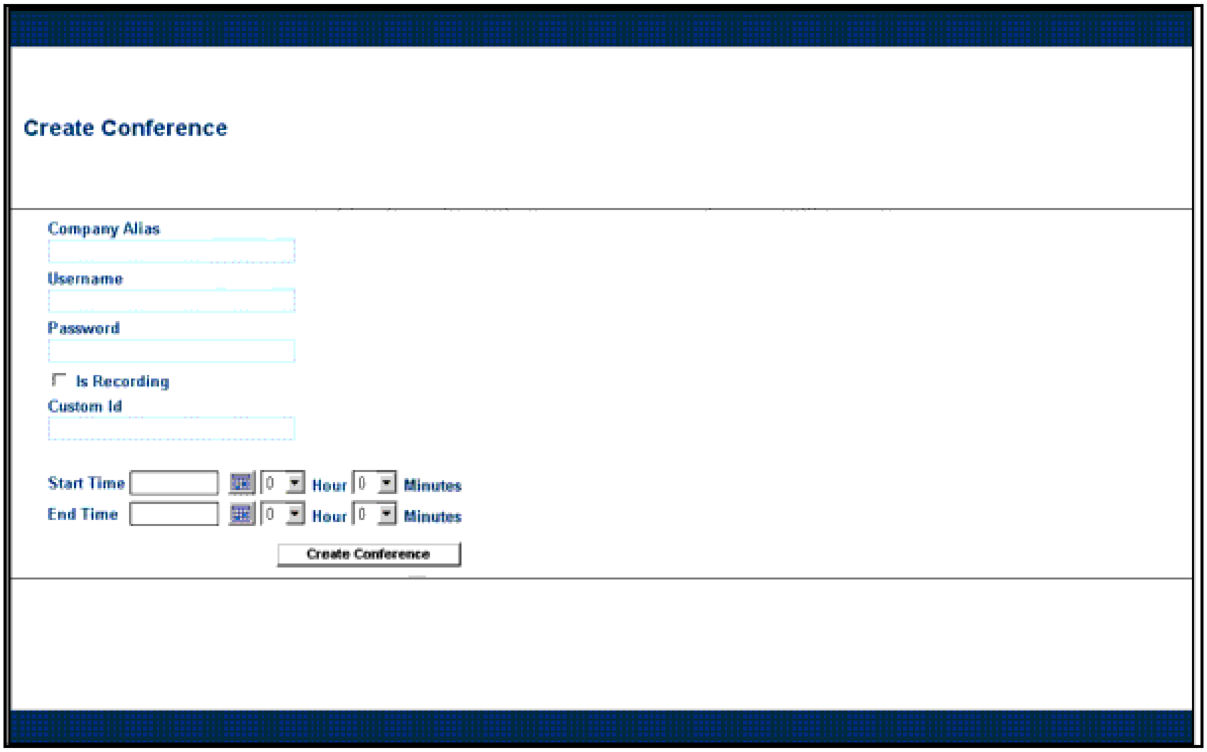


Figure 118.Create Conference Web Page

3 Use the information in Table 13 to complete the fields in the Web page.

Table 13. Create Conference Web Page Fields & Descriptions

Field	Description
Company Alias Username Password	Enter the same information that you use when you log in to the Administration Manager (AM), Supervision Manager (SM), or Interaction Manager (IM). **NOTE:** See your supervisor or administrator if you do not know what to enter in these fields.
Is Recording	For the system to record the conference, check this box. **NOTE:** Supervisors can listen to the recorded conference later by using the Interaction History screen in SM.

Table 13. Create Conference Web Page Fields & Descriptions

Field	Description
Custom ID	This is an identification tag associated with the conference. **NOTE:** It does not appear anywhere in any CCA application, but it is stored in the CCA database so companies can write custom queries for reporting on scheduled conferences.
Start Time End Time	Click the calendar icon to select a start day and an end day. From the drop-down list, select the start time (hours and minutes) and the end time (hours and minutes) for the conference.

4. Click Create Conference.

   The Create Conference Web page changes (Figure 119) to show you two passwords: Chair Password and Conference Password.

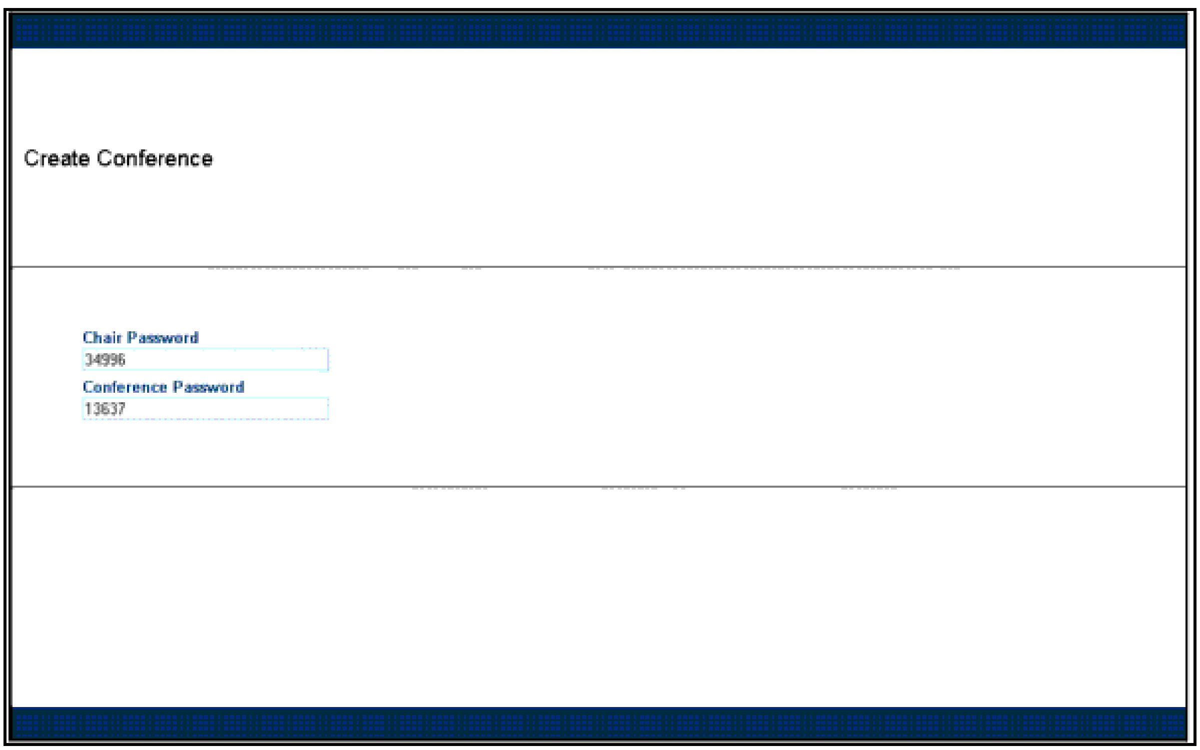


Figure 119.Create Conference - Passwords

5. Immediately copy and save these passwords into a text or word processing document. (Do this because no one can join your conference without these passwords.)

   Here is the difference between the two passwords:

- The first person who joins the conference using the Chair password is considered the meeting chairperson and will receive a warning notice that the conference is ending soon.
- The chairperson can also choose to extend the conference, if they wish.

TIP: In general, keep the Chair password for yourself. If two people join the conference using the chair password, and the first exits the conference, the remaining person becomes the meeting chair and receives the end of meeting notice.

6 Use your email program to notify all of the participants about the upcoming conference. The participants need to know:

- The start day and time, and the end day and time for the conference.
- The conference password.
- The conference phone number.

NOTE: Ask your administrator for this number.

7 At the appropriate time, when participants call the phone number, they are prompted to enter the conference password.

Participants are added to the conference, if they enter the correct password and the conference is in progress.

However:

- If participants enter an incorrect conference password or
- If the conference has ended or
- If the conference has not yet started,

then something else may happen, depending upon your system configuration*.

NOTE: *These are all situations that are custom configured for your company. Ask your administrator for more information.

A Interaction Manager Hotkeys

This appendix provides Hotkeys, which are short cuts that may save you time. It includes the following topic:

- Interaction Manager Hotkeys

Interaction Manager Hotkeys

Table 14 shows shortcuts (hotkeys) you can use to preform various functions. So, for example, to load the Interaction History, press the CTRL key at the same time you press K (on your computer's keyboard).

Table 14. Hotkeys

Hotkey	Description
CTRL + K	Load Interaction History
CTRL + U	Do Not Call
CTRL + J	Auto Redial
F10	About Interaction Manager
ALT + J	Configuration
F1	Interaction Manager Help
CTRL + 0	Supervisor
CTRL + 1	Call Control
CTRL + 2	Contact
CTRL + 3	Chat
CTRL + 4	Scripts
CTRL + 5	Predictive
CTRL + 6	Custom
CTRL + 7	Tasks
ALT + L	Logout
ALT + C	Collaborate
ALT + I	End Chat Session
ALT + P	Push To Client

Table 14. Hotkeys

Hotkey	Description
ALT + X	Chat Response
ALT + S	Send Text To Chat Client
ALT + W	Transfer
ALT + U	URL Library
ALT + M	Clear Display
ALT + Q	Load FAQ
ALT + R	Load Script
ALT + V	View
ALT + O	Open
ALT + N	Accept Interaction
ALT + B	Available
CTRL + B	Bill Call To
ALT + G	Change Status
ALT + K	Check Messages
CTRL + T	Company Directory
ALT + C	Conference
CTRL + G	Dial
ALT + Z	Disconnect
ALT + X	Email Response
ALT + P	Enter Conference
ALT + P	Exit conference
CTRL + H	Hang Up
ALT + O	Hold
ALT + Y	Make This My Last Call
ALT + S	Load Script
ALT + I	Missed Calls
ALT + U	Mute
ALT + U	UnMute
ALT + Q	Load FAQ
ALT + R	Start Record
CTRL + Y	Supervised Transfer

Table 14. Hotkeys

Hotkey	Description
ALT + W	Transfer To
ALT + M	Voicemail
CTRL + S	Connect To Server
CTRL + S	Disconnect From Server

kj

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