



Contact Center Anywhere Interaction Manager Guide

Version 8.1.1

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ORACLE®

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1

What's New in This Release

What's New in Contact Center Anywhere Interaction Manager Guide, 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, Version 8.1.1

Topic	Description
See "Enabling Call Trace" on page 65.	In an emergency, you can initiate a Call Trace, which will begin recording the interaction.
See "Disable Recording" on page 63.	You can select Disable Recording to immediately stop all recording of a call.
See "Accessing Tutorial" on page 149.	The Integrated Client includes new Tutorial option (multi-media) for new users and continued education.

2 Introduction

This chapter describes Oracle's Contact Center Anywhere's (CCA) Interaction Manager (IM), terminology, and screen components. This information is especially useful for new users who are unfamiliar with IM's operations and features. The chapter includes the following topics:

- [What is Interaction Manager?](#)
 - [Understanding Interactions, Projects, and Workgroups](#)
 - [IM Features and Benefits](#)
- [Identifying IM Screen Components](#)
 - [Toolbar](#)
 - [Sidebar](#)
 - [Interaction Control Bar](#)
 - [Wallboard](#)
 - [Workspace](#)
 - [Bottom Bar](#)
 - [Application Tab](#)
- [Customizing Your Interaction Manager](#)
 - [Resizing Your Workspace Area](#)

What is Interaction Manager?

Interaction Manager (IM) is a Web-aware call control and contact management tool for contact center agents. With IM, you can communicate with customers in different ways, including by phone, email, and the Web.

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.

TIP: You can easily launch IM using a simple mouse-click when you install its desktop icon.

Understanding Interactions, Projects, and Workgroups

In general, an *interaction* occurs any time a customer tries to reach the contact center; usually by phone, email, or Web chat. An interaction can also occur when the customer leaves a voicemail message or asks an agent to call them 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 a specific agent. CCA uses *Projects* and *Workgroups* to help connect the customer to the agent that most likely has the information the customer needs. The contact center's system administrator creates projects and workgroups using agent information and skill sets.

A *Project* is based on a specific campaign or objective for handling a group of like interactions. Its purpose is to identify the media types involved, the kind of treatment to perform, and to identify which workgroups are to receive specific interactions. Examples of projects include *Sales*, *Technical Support*, *Accounts*, and so on. Usually, customers dial a phone number associated with a specific project. Each project can then route 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 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 a *UNIX - Spanish* workgroup. Thus, when a Spanish speaking customer calls with a UNIX question, CCA routes them to you or someone else who is also in that specific workgroup, depending upon availability.

IM Features and Benefits

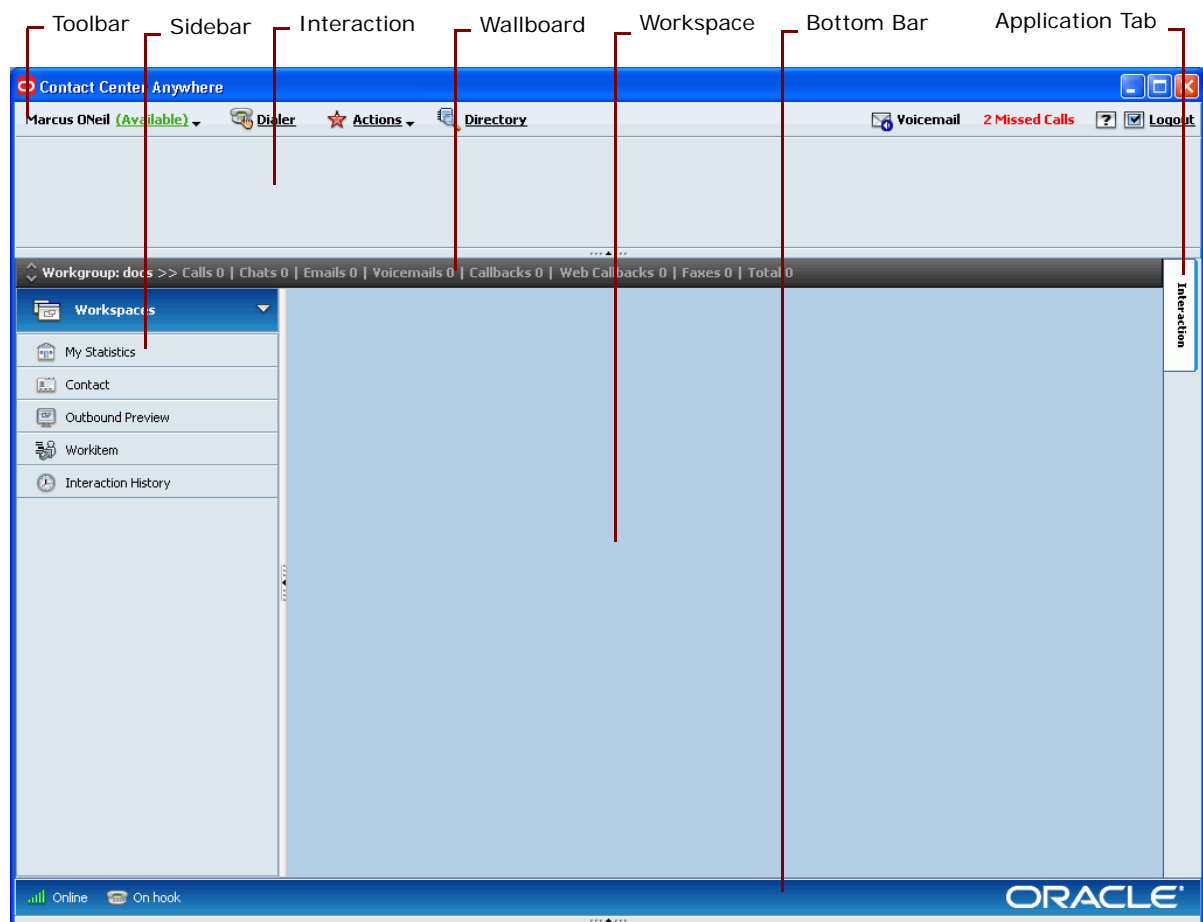
Contact Center Anywhere includes feature sets, which system administrator's can customize to each contact center requirements. Agents use the IM to perform various functions, defined by the features included for their contact center. The following list describes the major features and benefits users can experience while using the IM:

- Multimedia ready, accepting phone calls, emails, ACD voicemails, 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.
- Easy to access Company Directory.
- Automatically displays the number of missed calls and personal voicemails, retrievable using direct links.
- Automatic display of project name or phone number (DNIS) with each interaction.
- Web-callback feature with support for specific contact center scripts. Agents can respond to Web customers quickly and with the information the customer needs.
- *Predictive* and *Preview* dialing features with support for specific contact center scripts.
- Project-specific screen pops facilitate using the contact center tool-based workspaces for interaction handling and other independent functions

Identifying IM Screen Components

Your work is easier if you understand how the main page is organized. Each section of the page provides specific information and links to help you perform your job more efficiently. In addition, you can enlarge or shrink the Workspace Area to fit your needs. The following figure shows the main sections, which include the:

- Toolbar
- Sidebar
- Interaction Control Bar
- Wallboard
- Workspace
- Bottom Bar
- Application Tab



Toolbar

The Toolbar is your CCA communication command center, providing an instant view of your status. From the Toolbar, you can launch a variety of interactions and define several personal preferences.

No matter which page is open, the Toolbar remains at the top of the screen, even if you collapse windows to maximize usable space. You can always see icons representing Agent Status, the Dialer, popular actions, the Company Directory, messages, missed calls, online help, configuration options, and Logout. Table 2 describes each Toolbar item in greater detail.

Table 2. Toolbar Items and Descriptions

Toolbar Item	Description
Agent status display (or selection)	<p>Displays your name and current status. You can change your status by choosing a selection from the drop-down list. The list includes both system and custom statuses, so they may vary. However, you will always see <i>Available</i>, <i>Busy</i>, <i>Last Call</i>, and <i>On Break</i>. (Your administrator may define additional custom statuses, such as <i>At Lunch</i>, <i>In Meeting</i>, <i>In Training</i>, and so forth.)</p> <p>CAUTION: Your status MUST always be Available for CCA to send you new interactions.</p>
Dialer	<p>Click to open the Dialer, which you can use to dial an interaction of various types (such as <i>Outbound call</i>, <i>Extension call</i>, <i>PBX call</i>, and <i>IP call</i>).</p> <p>You can also access the Speed Dialer tab, where you can select a predefined number (or numbers) assigned to a longer stored, often used, number.</p>
Actions	Click this link to select an action from a drop-down list (such as <i>Connect To Server</i> , <i>Put in the Do Not Call List</i> , <i>Redial</i> , and <i>Predictive Login</i> .)
Directory	Click to open the Company Directory, where you can find information about another user at your company (such as <i>phone numbers</i> , <i>extension number</i> , <i>presence</i> or <i>absence</i> , <i>status</i> , and <i>addresses</i>).
Voicemails	A red voicemail message link appears when you have one or more personal voicemail messages waiting for you. Click the link to open the Voicemail Inbox, where you can view more information, or listen to the voicemail message. The link appears black after you finish, and remains until you deleted all the messages you checked in your Inbox.

Table 2. Toolbar Items and Descriptions

Toolbar Item	Description
Missed Messages	A red missed calls message link appears if a caller hangs up before you answer the call that was dialed directly. Click the link to open the Missed Messages box, where you can view more information or return the call. After viewing your message, the link turns black and remains until you delete all viewed messages.
Help icon	Click this link to open online help about the page you see. Help also includes an index and word or phrase search feature.
Configure icon	Click to open the Configure Menu, where you can set various preferences (such as <i>Incoming interaction mode</i> , your <i>Email Client</i> , <i>Project Billing</i> for phone calls, your <i>telephone number</i> , <i>customized icons</i> , <i>time zone</i> formatting, and <i>date</i> formatting).
Logout	Click this link to logout of CCA.

Sidebar

The Sidebar provides access to *independent activities* and information, which may include your statistics, contacts, outbound previews, work items, and interaction histories. (Independent activities are activities that are not directly related to the interactions in progress.) Additional interactions are available from a drop-down list.

NOTE: Outbound Preview lets you select and initiate preview calls between interactions.

In addition, the sidebar capabilities are easily extended using XML file extensions for future enhancements.

Interaction Control Bar

This area lets you access information about an unlimited number of interactions. Since the design self-adjusting, you can view the details of two or more interactions at one time, depending upon your screen resolution and size. Table 3 explains the details you can see, which include real-time information.

Table 3. Interaction Control Bar Items and Descriptions

Interaction Control Bar Items	Description
Interaction Type icon	Shows the current interaction type by its icon and text.
Contact information for the active interaction	If a contact (customer) is assigned to an active interaction, you will see the contact's name and all information previously recorded about the contact in the workspace area. If the contact is unassigned, <i>UNKNOWN</i> appears in place of the name.
Elapsed Time	Shows both the elapsed and wrap-up times for the interaction.
Customer Priority Rating	Shows the <i>customer</i> priority level or (for a contact without an assigned level) shows the priority level of the <i>project</i> through which the customer called.

Wallboard

The enhanced Wallboard shows you the number of interactions currently in the queue for each of the workgroups to which you belong, as well as any supervisor messages (which you must acknowledge). Workgroup statistics scroll from one workgroup to the another every 10 seconds. [Figure 1](#) shows the number of interactions for a specific workgroup and [Figure 2](#) shows a broadcast message.

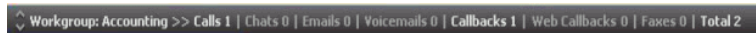


Figure 1. Example Wallboard Display - Workgroup Interactions

You must click OK to acknowledge and clear a broadcast message.



Figure 2. Example Wallboard Display - Message

Workspace

The Workspace area is where you will spend most of your time. The information that displays here pertains to an individual interaction or independent action. You can see contextually sensitive information relative to specific tasks and specific interactions. For example, when you are handling an interaction, the Workspace area is where contact screens appear and where you can perform searches.

In addition, the Workspace area also remembers the state of each interaction. This memory allows you to switch easily between interactions and, upon your return, still maintain the context of the interaction in the state you left. Workspace memory also applies to independent activities accessed from the Sidebar. This means you can easily switch between independent activities and interactions without redeploying a search or other function.

NOTE: If you log out and log in again, IM returns you to the same information.

Bottom Bar

The Bottom Bar displays the status of the current session with words and icons. [Figure 3](#) shows a few example icons.



Figure 3. Example Bottom Bar Icons

NOTE: If an offline icon appears, it means you are not connected to CCA and cannot receive new interactions or access the database information normally. (Normally, this is a temporary condition that rarely occurs.)

NOTE: You cannot see all of the icons in [Figure 3](#) at the same time.

Application Tab

One or more Application tabs appears along the right side of your workspace (Figure 4). Which tabs you see depend upon your user rights, which are identified when you log into the application. The *Interaction* Application Tab and the activities you can access from it, is the focus of this user's manual.

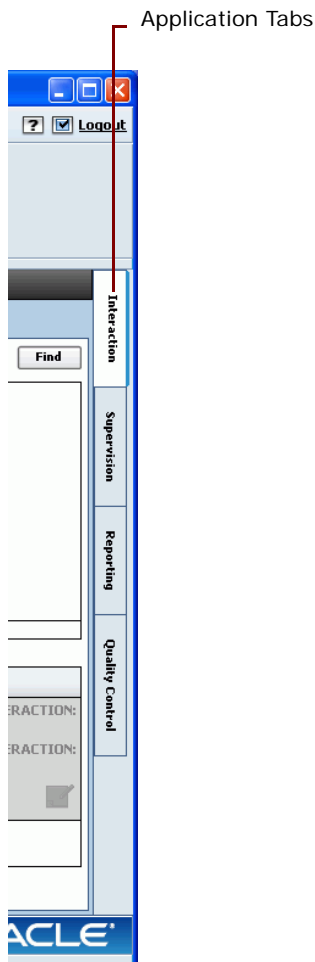


Figure 4. Application Tab Location

Customizing Your Interaction Manager

There are many easy ways to customize your IM. You can:

- Identify specific settings, such as notification preferences, phone options, regional settings, and so on. (Refer to [Chapter 4, "Configuring IM."](#))
- Resize your Workspace Area

Resizing Your Workspace Area

You can easily adjust the size of the workspace area to view all information, without further navigation or scrolling. Do this by clicking one or all of the three arrows (positioned between the areas shown in [Figure 5](#)), which provide an easy, one-click, (toggle) open and close option.

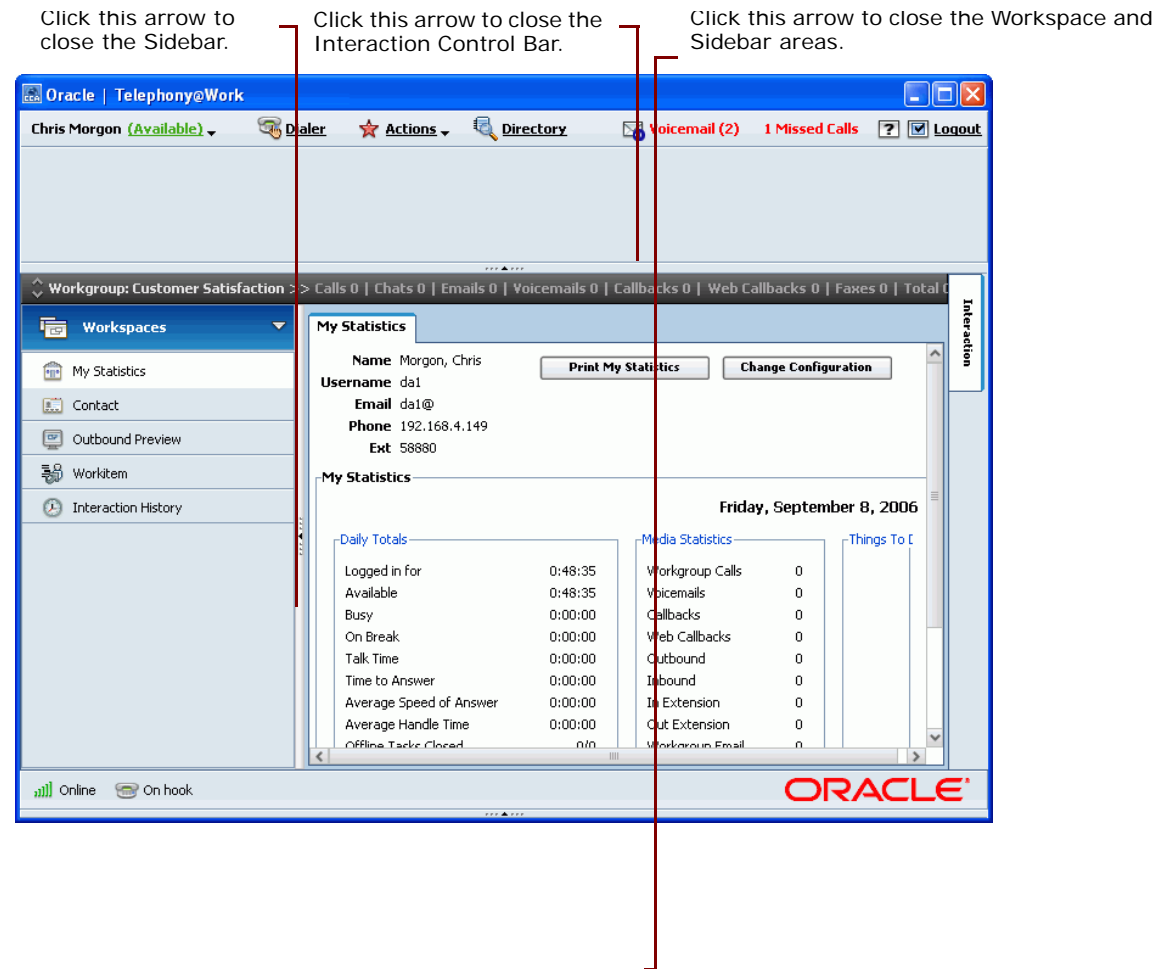


Figure 5. Click Arrows to Resize the Workspace Area

When you close the Sidebar, only the icons appear. Figure 6 shows the workspace area after closing both the Sidebar and the Interaction Control Bar.

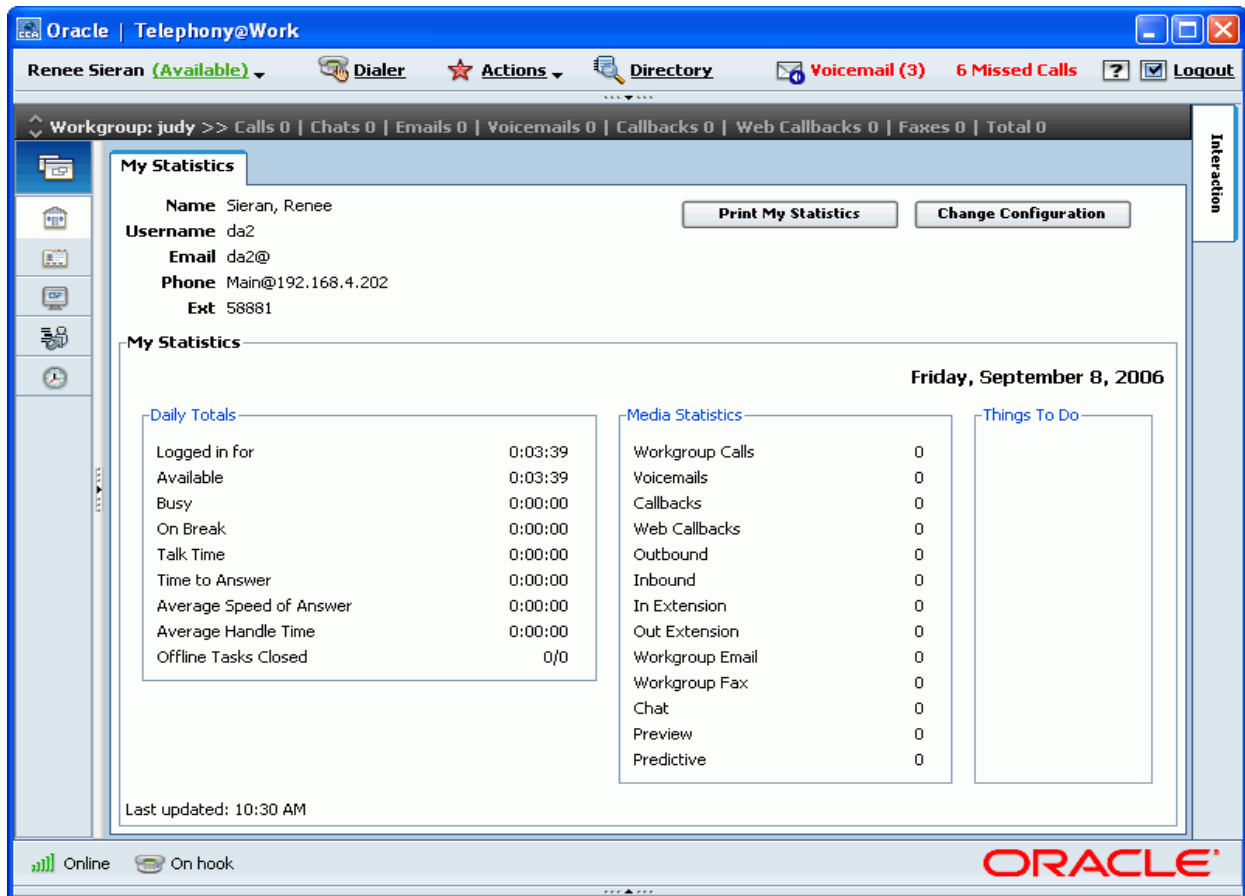


Figure 6. Increased Workspace Area

NOTE: You can also resize your entire window, using standard click and drag functions.

3

Launching Interaction Manager

This chapter describes how to login to the Interaction Manager (IM) application. It covers the following topics:

- [Starting and Logging In](#)
- [Managing Login Error Messages](#)
 - [Mismatched API Error Message](#)
 - [Forcing a Logout Due to Inactivity](#)
 - [About Java Applet Error Messages](#)

Starting and Logging In

You must log into the Contact Center Anywhere (CCA) application to accept contact center interactions, supervise contact center agents, or configure your contact center system preferences.

- 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 URL address for CCA provided by your contact center administrator. The CCA Launch screen appears.

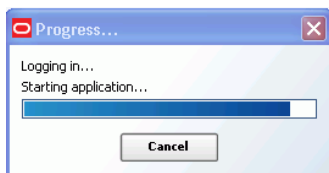


- 3 Create a shortcut and place it on your desktop so that you easily can launch CCA in the future.
- 4 Click the link to launch CCA. The Copyright screen opens for a short time and then the Java script loads. CCA downloads applet changes and any required software or updates.

- 5 When the Java script finishes loading, the Login screen opens.



- 6 Type your company alias, user name, and password into the corresponding boxes.
- 7 Choose your preferred language from the drop-down list. The application screens will appear in the language you select.
- 8 Click the Login button. During login, a progress bar appears as CCA authenticates your user name and password. CCA downloads your data, if there have been any changes.

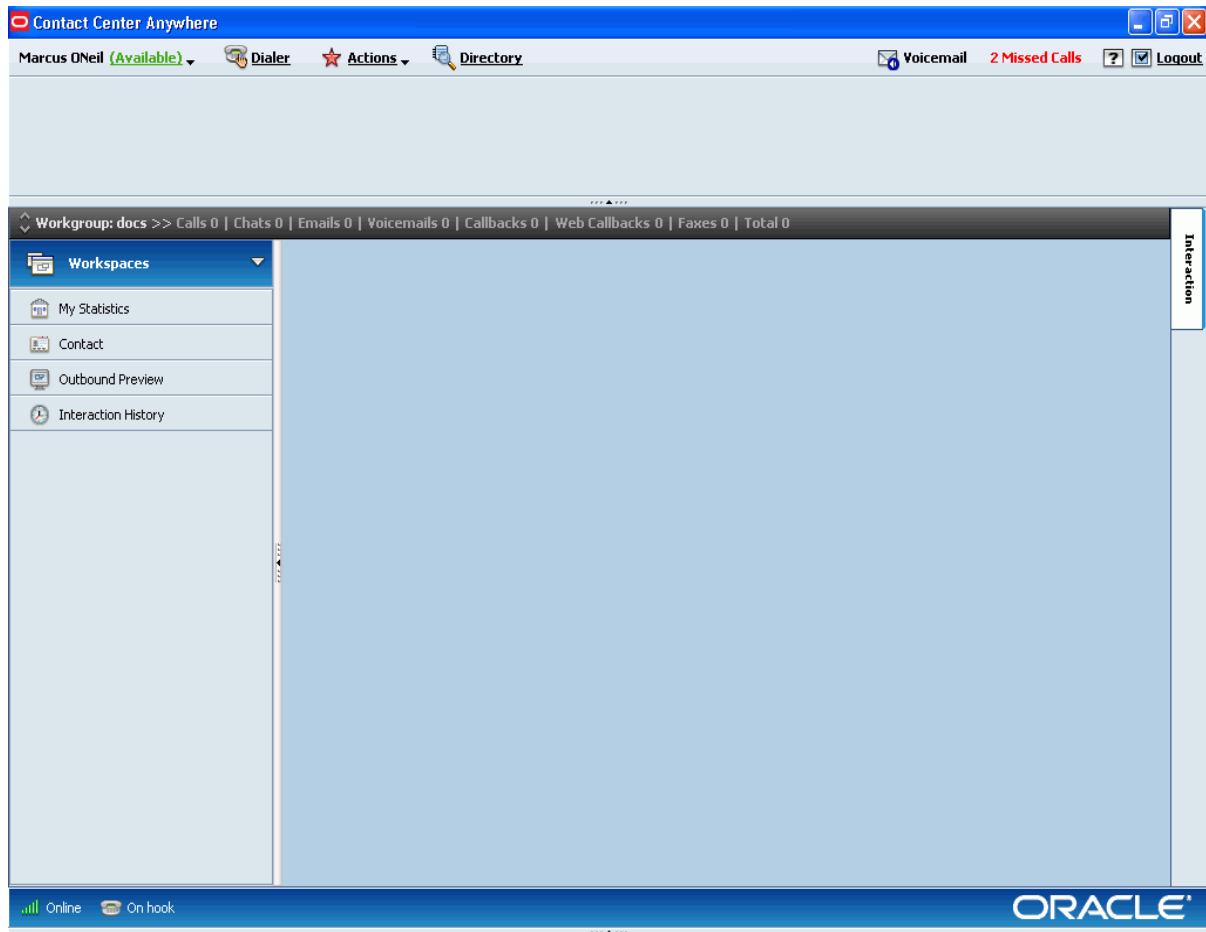


- 9 **If configured**, a Select Partition box opens. Otherwise, go to the next step.



NOTE: A *partition* is a way for your administrator to segment your contact center operations into smaller, more manageable *units*. A unit is typically a set of projects and workgroups, and other information related to them (such as FAQs, scripts, reports, and so forth). Partitioning has two purposes; the first one is functional and the second one is security. For example, assigning agents to specific partitions means they are able to log in and work only on one of these partitions. Furthermore, a supervisor can monitor and supervise only the partitions to which he belongs.

- 10 Select a partition from the drop-down list and click OK. The CCA Interaction Manager Main screen opens.



NOTE: If a log in error messages appears instead of the the main screen, ask your system administrator for assistance.

TIP: Add the CCA Launch screen to your browser’s Favorites Menu. Then, for subsequent IM sessions, simply load the CCA Launch screen by choosing it from your Favorites Menu. (Alternatively, you can use the optional desktop shortcut you created to launch the application.)

Managing Login Error Messages

Occasionally, you may see one of the following error messages as you log into CCA:

- **Mismatched AIP message.** Refer to [“Mismatched API Error Message”](#) on page 27.
- **Inactivity Timeout.** Refer to [“Forcing a Logout Due to Inactivity”](#) on page 27.
- **Account Locked. Contact Your Administrator.** Refer to [“Forcing a Logout Due to Inactivity”](#) on page 27.

- **Invalid JVM.** Please contact your administrator. Refer to [“Forcing a Logout Due to Inactivity” on page 27](#)).
- **Error loading applet, please contact your Administrator.** Refer to [“Forcing a Logout Due to Inactivity” on page 27](#).

Mismatched API Error Message

A Mismatched API version message (Figure 7) appears after CCA performs an upgrade while you still have the application open.



Figure 7. Mismatch Error Message

As the message instructs, logout **and** completely shut down the application (do not simply logout). Then, restart CCA.

Forcing a 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, you will see an Inactivity Timeout messages, such as the one shown in Figure 8.

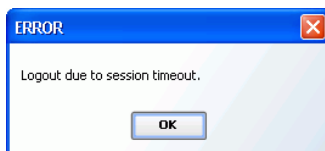


Figure 8. Inactivity Timeout Message

In addition, if you are logged out of CCA due to inactivity, then the next time you attempt to log in, an error message may appear indicating that you are locked out and you will not be able to login without first asking your administrator to reactivate your account. [Figure 9](#) shows an example.

A screenshot of an error message displayed in a red-bordered box. The text inside the box reads "Account Locked. Contact Your Administrator".

Account Locked. Contact Your Administrator

Figure 9. Account Locked Message

About 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 informing you of the problem and providing instructions for how to solve this problem.

4

Configuring IM

This chapter describes how to configure various IM settings, after logging into the Interaction Manager. Although default settings allow you to use IM right away, you can change these settings to meet any unique requirements you desire.

You can, for example, tell IM to play a specific sound when you receive an interaction. If you work from multiple locations (such as from the contact center, from your home, and from a different office location), then you must configure your telephone settings *each time* you change locations.

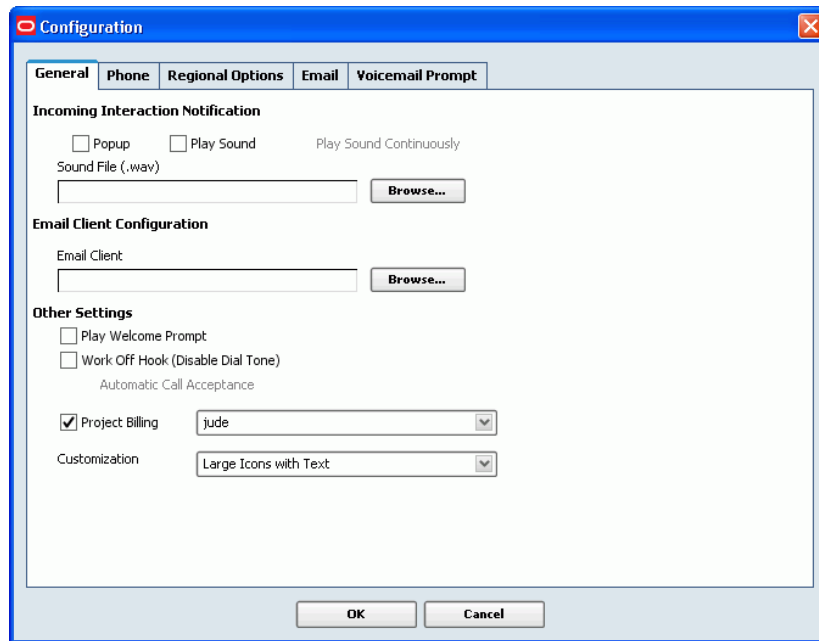
This chapter includes the following topics:

- [Identifying How to Be Notified \(for New Interactions\)](#)
- [Identifying Your Email Program](#)
- [Using a Welcome Prompt](#)
- [Working Off-Hook](#)
- [Using Automatic Call Acceptance of ACD Calls](#)
- [Selecting a Project for Billing](#)
- [About Icons](#)
- [Identifying Phone Options](#)
- [Setting Regional Options \(Time Zone and Date Formats\)](#)
- [Setting Email Options](#)
- [Recording Voicemail Prompts](#)

Identifying How to Be Notified (for New Interactions)

When you receive a new interaction, you can instruct IM to play a specific sound to let you know of its arrival. In addition, you can direct IM to play the sound once or continuously until you accept the interaction.

- 1 From the Toolbar, click the Configure button.
The Configuration dialog box opens to the General tab.



- 2 Select **Popup** to automatically display the IM screen in front, whenever you receive interactions.
- 3 Select **Play Sound** and then identify which sound file to play:

- Type the filename and location (path) of the sound file into the Sound File text box.

or

- Click the **Browse** button, located the sound (.wav) file on your computer or network, and then click the filename.

IM will now play the sound one time when you receive an interaction.

NOTE: You can load a different sound file anytime. However, for IM to play the sound, you must check the **Play Sound** box, and you must play **.WAV** files.

- 4 Select **Play Continuously**: IM will play the sound (.wav) file you loaded in step 2 repeatedly, until you accept the interaction.
- 5 Click **OK** to save your configuration settings.

Identifying Your Email Program

To manage email or voicemail interactions, you must tell IM which Email Client application (such as MS Outlook Express) to launch, if it is different than your default setting.

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.

- In the Email Client Configuration text box, type the filename and location (path) of the email program to use, and add “/recycle” to the path, so that only one instance of the Email Client opens.

or

Click the Browse button, locate the file on your computer or network, and then click the filename.

- Click OK.

NOTE: To let IM automatically log you into your Email Client, refer to “Setting Email Options” on page 37.

Using a Welcome Prompt

You can choose to play a Welcome prompt to the customer who made an ACD call, before they begin speaking with you. An example of a Welcome prompt might be, “Hello, my name is John Smith. I will be happy to assist you in a moment.” Welcome prompts are useful in environments where you give the same greeting to each caller.

- From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- Under Other Settings, click the Play Welcome Prompt check box, and then click OK.

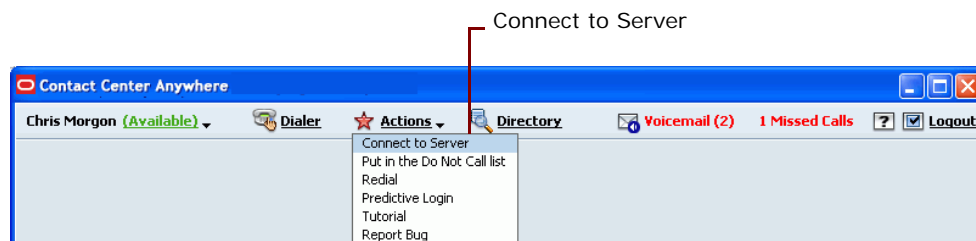
NOTE: Also see “Recording Voicemail Prompts” on page 38.

Working 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. Select off-hook whenever you are using a headset.

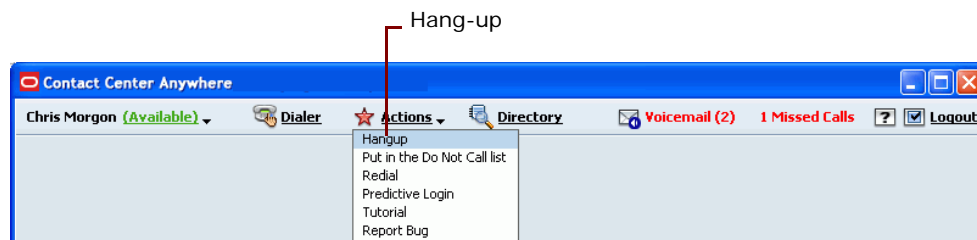
This is a two step process: In the first step, you must tell IM that you are working off-hook. In the second step, you must connect to the server to enable this feature or remain off-hook after the first call.

- From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab. Click the Work Off-hook (Disable Dial Tone) check box and then click OK.
- From the Toolbar, click the Actions link, select Connect to Server from the drop-down list, and then wait for the phone to ring.



- 3 When the phone rings, pick up your telephone receiver to begin working off-hook. Leave your receiver off hook until you are finished for the day. Each time you physically hang up the receiver, you must repeat these steps.

NOTE: Notice that, after you select Connect to Server, this option changes to Hang-up, as a reminder to hang up the phone after you finish accepting all calls.



Using Automatic Call Acceptance of ACD Calls

A feature of working off-hook is that you can automatically accept Automatic Call Distribution (ACD) calls as soon as they arrive in IM. (An ACD call occurs when someone dials a number associated with your contact center and is routed to you, instead of directly calling your number.)

When a call arrives, a tone plays in your headset to notify you that CCA is automatically connecting you to the caller. You do not need to click the Accept Interaction button. When you hear the tone, begin speaking.

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 Select the Work Off Hook (Disable Dial Tone) check box.
- 3 Select the Automatic Call Acceptance check box.
- 4 Click OK.

CAUTION: The Automatic Call Acceptance feature only works with ACD calls. CCA does not automatically accept calls made directly to your phone number (such as direct inbound and extension-to-extension calls). For these call types, you must click the Accept Interaction button to connect to the caller.

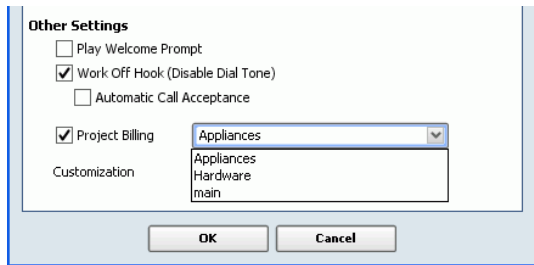
Selecting a Project for Billing

If your contact center is configured to allow agents to make outbound calls, you must first select a project. This allows CCA to bill your outbound calls to a specific project. If configured, CCA automatically knows your billing information, by partition or user name.

If you do not select a billing project, then each time you make an outbound call, you will need to select a project from a dialog box.

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

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 Select the Project Billing check box. A list of available projects opens. The following shows an example.



- 3 Select a project from the list and click OK.

About Icons

You can change the appearance of icons to suit your individual needs. You can make the icons small or large, and with or without text. If you are new to IM, you may want to see the icons with their corresponding text descriptions until they become familiar to you by icon alone.

Changing the Appearance of Icons

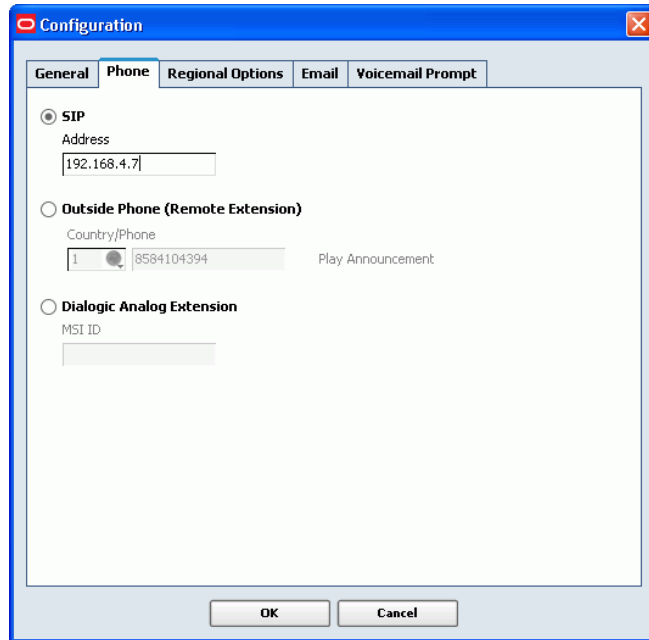
- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 From the Customization drop-down list, select Small Icons Without Text, Large Icons Without Text, Small Icons With Text, or Large Icons Without Text.
- 3 Click OK and, after an update successful message appears, click OK again.

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 number for that system. You will not need to change these settings again as long as you do not access the contact center from any other location. However, if you work from multiple locations (such as from the contact center, from your home, and from a different office location), you must configure IM *each time* you change locations.

Setting Your Phone Extension

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 Click the Phone tab and identify the type of phone you are using.



CAUTION: If you are not sure which type of phone you are using, ask your contact center administrator.

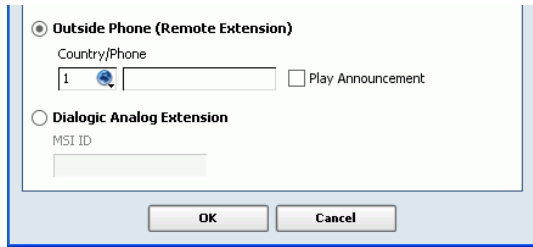
- 3 Choose your phone type from the following:
 - If you choose SIP (Session Initiation Protocol), enter the IP address for your SIP phone or workstation (if using a softphone) in the corresponding address box.

SIP is a signaling protocol for Internet conferencing, telephony presence, events notification, and instant messaging.
 - If you chose PBX (Private Branch Exchange), enter your extension number in the corresponding phone box.

PBX is a private telephone network used within an enterprise, which works as a switching system to provide telephone communications between internal stations and external telephone networks. Users of the PBX share a specific number of outside lines for making telephone calls external to the PBX.

- 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, select your Country Code from the drop-down list, and then type your phone number into the adjacent box.



NOTE: If you select Outside Phone, you can also select the adjacent Play Announcement check box. When selected, the system plays a recorded message telling you there is a phone interaction waiting to be connected. This is especially useful if you are working from home, as this helps you distinguish work calls from personal calls. You also have the option to accept or decline the interaction.

- a If you chose Dialogic Analog Extension, type your MSI identification number in the MSI ID box.

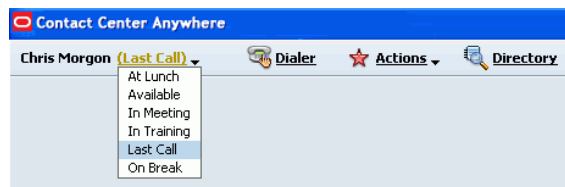
NOTE: This option is for a system that uses an MSI board for phone extension. If you have an MSI extension, you can also choose to work off-hook. Refer to [“Working Off-Hook”](#) on page 31 for more information.

- 4 Click OK to save your configuration settings.

Setting an Outside Phone Number

If you plan to travel from one workstation to another, then **before** you leave, you must tell CCA which number you will be using.

- 1 From the Toolbar, click the Status drop-down arrow and select Last Call.



- 2 Click the Configure button. The Configuration dialog box opens to the General tab.
- 3 Click the Phone tab and check Outside Phone.
- 4 Select the Country from the drop-down list, and type the phone number that you will use at the other location.

- 5 Click OK.
- 6 Logout of IM.

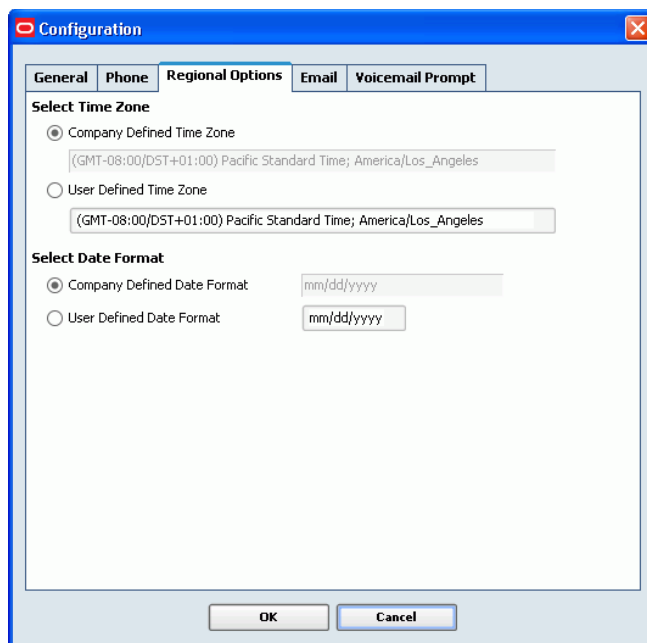
When you login at the other location, CCA will be ready to send interactions to the number you identified.

NOTE: Each time you change phone numbers, you must repeat these steps.

Setting Regional Options (Time Zone and Date Formats)

You can configure your time zone and date format to match someone else's time zone and date format. You may want to do this, for example, if you work in a different time zone than most of your customers (or your company headquarters) and it would be easier to work within their parameters.

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 Select the Regional Options tab.



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

or

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, select the Company Defined Date Format to match your company's format or
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 immediately display times and dates in the time zone and format you selected.

NOTE: The date format for the United States is mm/dd/yyyy. The format for Europe is dd/mm/yyyy.

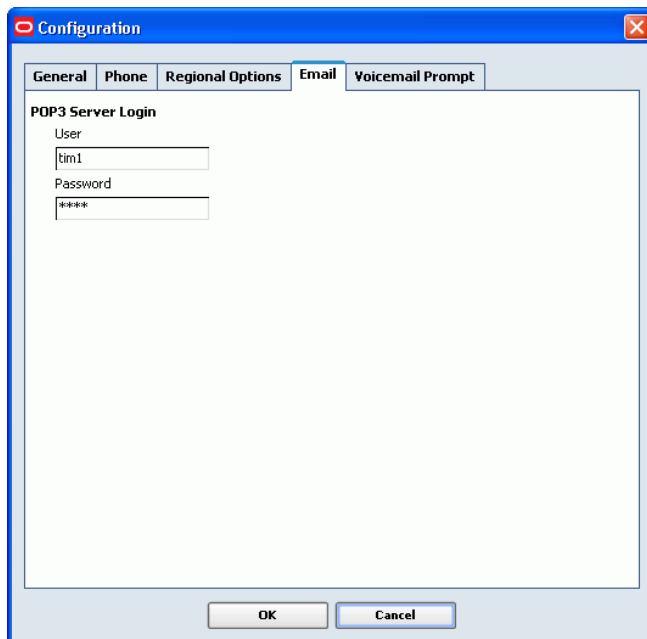
Setting Email Options

To receive mail:

- There must be a server on your network that distributes mail (the POP3 server) and
- You must have 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, here is how.

- 1 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 2 Select the Email tab.



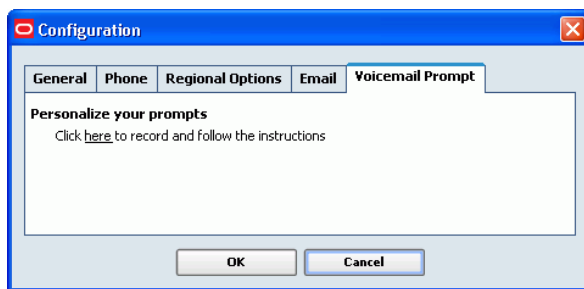
- 3 Enter or change the User and Password field information to match your POP3 Server Login. You can do this at any time. (If you are not sure what to enter, contact your supervisor or administrator.)

NOTE: If you click the mouse in the User and Password fields but find 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 pick up the phone and before they leave a voicemail message. Example messages include your personally recorded greeting, your name, and a Welcome prompt.

- 1 Make sure your phone is configured. (Refer to “Identifying Phone Options” on page 33.)
- 2 From the Toolbar, click the Configure button. The Configuration dialog box opens to the General tab.
- 3 Click the Voicemail Prompt tab.



- 4 Click the **here** link and wait for your phone to ring.
- 5 When your phone rings, pick it up, and follow the instructions you hear over your telephone hand set.
- 6 When you finish recording your message, press the star button on your phone or hang up.
- 7 Click OK.

5

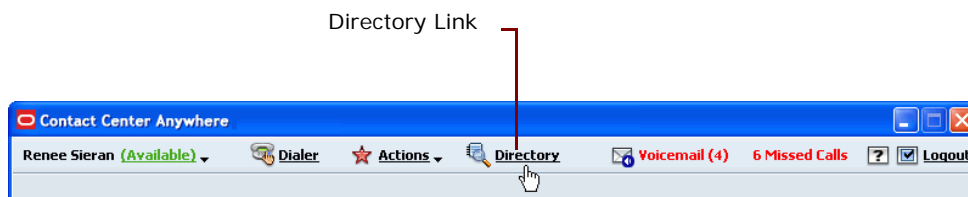
Finding Anyone in the Company Directory

This chapter describes how to use the Company Directory to find and call anyone in your company, even if you do not know their extension. This chapter includes the following topics:

- [Accessing the Company Directory](#)
- [Calling a User](#)
 - [Calling from the Directory List](#)
 - [Calling from the View User Screen](#)
- [Quickly Finding and Calling a User](#)
- [Finding Everyone in a Department or Group](#)
- [Finding a User by Their First or Last Name](#)
- [Finding Anyone \(Example Searches\)](#)
 - [Finding a User from a List of Names](#)
 - [Finding Users Whose Last Name Begins with "A"](#)
 - [Finding Users with a Phone Extension Ending in "45"](#)
- [Finding Additional User Information](#)

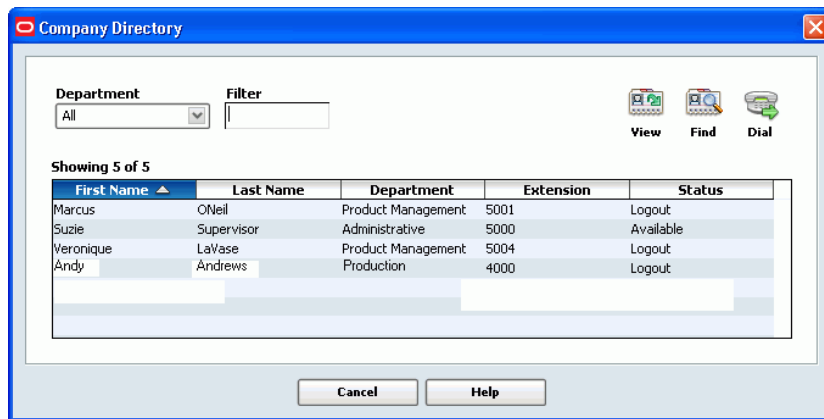
Accessing the Company Directory

- 1 From the Toolbar, click the Directory link.



The Company Directory dialog box opens, showing the name, department, phone extension, and ACD status of other users for the company you signed into, or for the same partition you signed into (if you signed into a partition).

NOTE: Before to call an agent, check their status. You may not want make a call if the agent is current on an ACD call or On Break.



- 2 Find a user from the Department or Filter boxes. Refer to:
 - “Quickly Finding and Calling a User” on page 42.
 - “Finding Everyone in a Department or Group” on page 42.
 - “Finding Anyone (Example Searches)” on page 43.
 - “Finding Additional User Information” on page 44.

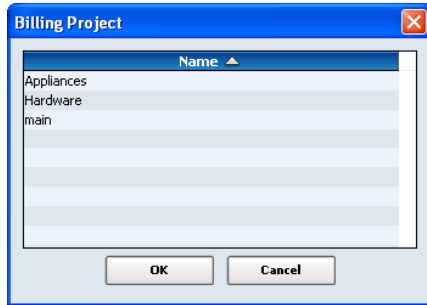
Calling a User

After finding the user in the Company Directory, you can easily call them from the Directory List page or from the View User screen.

Calling from the Directory List

- 1 Double-click the desired user.

- 2 If configured, a Billing Project window opens for you to select a project to bill. Double-click a project.



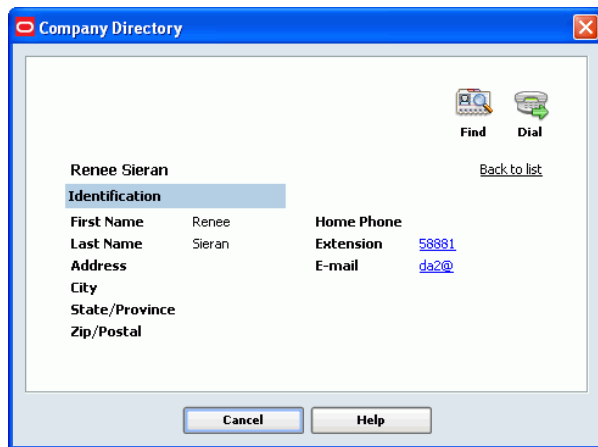
CCA rings your extension. The user's name and extension you dialed appears in the Interaction Control Bar.



Calling from the View User Screen

If you choose to view the user's information page before making the call:

- 1 Select the user from the Directory List and then click the View icon. The View User screen opens.



- 2 From the View User screen, click the underlined extension number or the Dial icon.

- 3 If configured, a Billing Project window opens for you to select a project to bill. Double-click a project.

CCA rings your extension. The user's name and extension you dialed appears in the Interaction Control Bar.

Quickly Finding and Calling a User

- 1 From the Department drop-down list, select a department or All (for everyone in the company or partition).
- 2 The Filter box, lets you filter on all five columns, and multiple field searches are supported with the filter box. So, for this example, begin typing the user's first or last name in the Filter box. Matches appear on the page. (You can slo find someone where "c" is the start of one field and "b" is the start of another.)

NOTE: The filter is not case sensitive but you must spell the name correctly. You **cannot** use the wildcard asterisk (*) character in the Filter box.

TIP: If desired, click a column heading to sort the list of results.

- 3 Double-click the desired user to place the call.

NOTE: Notice that the Connect To Server button (in the Actions drop-down list) changes to Hang Up as the number dials.

- 4 If required, the Billing Project window opens for you to select a project to bill. Double-click a project (or click once and then click OK).

CCA rings your extension. The user's name and extension you dialed appears in the Interaction Control Bar.

Finding Everyone in a Department or Group

The first search box provides Departments (or other groups), depending upon your configuration.

- 1 From the Department drop-down list, select a department (or group name).
- 2 In the Filter box, begin typing the user's first or last name. Matches appear on the page.

NOTE: The filter is not case sensitive but you must spell the name correctly. You cannot use the wildcard asterisk (*) in the Filter box.

TIP: If desired, click a column heading to sort the list of results.

- 3 Select the user (by clicking the row).

a To call the user, click the Dial icon.

b To find additional information (such as home phone, work phone, email address), click the View User icon.

Finding a User by Their First or Last Name

If you know the user's first or last name, then you can find information about the user using the Find User icon.

- 1 From the Department drop-down list, select the user's department or All (if you are not sure).
- 2 Click the Find User icon. The Find User form opens.

- 3 Type the first or last name in the appropriate box.
TIP: You can use an asterisk (*) as a wildcard character.
- 4 Click the Find button (located in the bottom middle of the form). The Company Directory List reappears showing a list of matching user.
- 5 You can now call the user or view additional contact information by clicking one of the icons.

Finding Anyone (Example Searches)

There are many ways to find another user. Here are a few examples.

Finding a User from a List of Names

- 1 From the Department drop-down list, select All.
- 2 In the Filter box, begin typing the user's first or last name. Matches appear on the page.
TIP: If desired, click a column heading to sort the list of results.
- 3 Click to select the desired user and then click the View icon. All known information about the user appears.

Finding Users Whose Last Name Begins with “A”

- 1 From the Department drop-down list, select All.
- 2 Click the Find User icon. The Find User form opens.
- 3 In the Last Name box, type A*.
- 4 Click the Find button (located at the bottom middle of the form). The Directory List reappears showing all users whose last name begins with “A.”

Finding Users with a Phone Extension Ending in “45”

- 1 Click the Find User icon. The Find User form opens.
- 2 Type *45 in the Extension box.
- 3 Click the Find button (located at the bottom middle of the form). The Directory List reappears showing all users whose extension ends with 45.

Finding Additional User Information

From the View User screen, you can find additional information about a user, such as a home phone number, work phone, email address, and so on.

- 1 Find the desired user from the Company Directory, using one of the search methods (refer to [“Finding Anyone \(Example Searches\)”](#) on page 43).
- 2 Double-click the desired user from the search results list. The View User screen opens to show all known contact information for that user.
- 3 Click the Back to List link to return to the Company Directory.

6

Agent Status and Statistics

This chapter explains the importance of your status, how and when to change your status, and how to view real time statistics about your activity while working in the Interaction Manager (IM). This chapter includes the following topics:

- [Determining Your Status on IM](#)
- [Controlling Your Status](#)
 - [When to Select Available](#)
 - [When to Select Last Call](#)
 - [When to Select a Custom Status](#)
- [Viewing Your Statistics](#)
- [Viewing Real-Time Statistics](#)
 - [Daily Totals](#)
 - [Media Statistics](#)
 - [Printing My Statistics](#)

Determining Your Status on IM

IM only sends interactions to agents who have an **Available** status. Thus, always refer to your Agent Status (on the Toolbar) to determine if IM knows you are currently available to receive interactions.

IM tracks the time from when you receive an interaction to when you accept it. Furthermore, you have a maximum amount of time, the *call time limit*, to answer an interaction. It is set by your system administrator. If you do not accept an interaction within your *call time limit*, IM changes your status to *No Answer* and returns the interaction to the queue for the next *Available* agent.

CAUTION: IM will not send you any more interactions until you manually change your status back to *Available*.

Table 4 shows the agent statuses:

Table 4. Agent Statuses

Status	Description
Available	<p>If you are not handling an interaction and are ready to accept a new interaction, Available should appear in the Status box.</p> <p>Normally, IM automatically resets your status to Available each time you finish an interaction. However, there may be times when you need to select the Available status so that IM will send you a new interaction. (Refer to “When to Select Available” on page 46.)</p>
Last Call	Select Last Call to tell IM that you will not accept any more interactions after you complete the one you are currently answering.
On Break	Select On Break to tell IM that you are not available to receive any interactions.

NOTE: Your administrator may have added additional statuses that control your availability (such as *At Lunch, In Meeting, In Training*). Consult your administrator for a description of custom statuses not provided in Table 4.

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 accept an interaction and then change your status to **Available**, so that IM will automatically route a new interaction to you (allowing you to handle multiple interactions).

NOTE: IM only routes calls to agents who are **Available**.

By selecting different statuses, you can control your work load in these ways:

- 1 Select *Available* to immediately let IM know you are ready to receive a new interaction.
- 2 Select *Last Call* to tell IM not to give you any more calls after finishing the current interaction.
- 3 Select a custom status that was created just for your contact center.

When to Select Available

Generally, your status automatically returns to *Available* when you finish an interaction. But there are some times when you may want to manually select Available to change your status.

For example, if you are away from your desk and your status is still Available, IM may offer you an interaction. Then, if you do not accept the interaction (because you are away), IM will offer the interaction to another agent and change your status to *No Answer*.

Thus, when you get back to your desk, you **must** select Available to let IM know you are ready to accept interactions.

NOTE: You must select Available to handle more than one phone interaction at the same time. Refer to Chapter 16, "Managing Multiple Interactions."

When to Select Last Call

When you are going to be away from your computer for awhile, select Last Call to let IM know you are not available to accept any more interactions.

- If you are not handling an interaction at the time you select *Last Call*, IM will not offer you an interaction until you manually change your status back to *Available*.
- If you are handling an interaction when you select *Last Call*, complete the interaction as you normally would. When you finish the interaction, leave your workstation. IM will not offer you another call until you manually select *Available*.

When to Select a Custom Status

Your administrator can create custom statuses for your contact center (such as *Internal Meeting*, *Training*, and so forth) to be more specific about what you are doing. However, no matter what custom status appears in your Toolbar, your status to IM is always:

- Available (to accept interactions) or
- Busy (not available to accept interactions) or
- On Break (not available to accept interactions)

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

Viewing Your Statistics

The My Statistics tab shows:

- Your name, user name, email address, telephone number, and extension number.
- The partition name(s), if applicable.
- Real time statistics about your activity while logged into the IM. Statistics include your Daily Totals, Media Statistics, and Things to Do list.

NOTE: The specific items you see may vary, depending upon your company's projects and settings.

Figure 10 shows an example My Statistics screen:

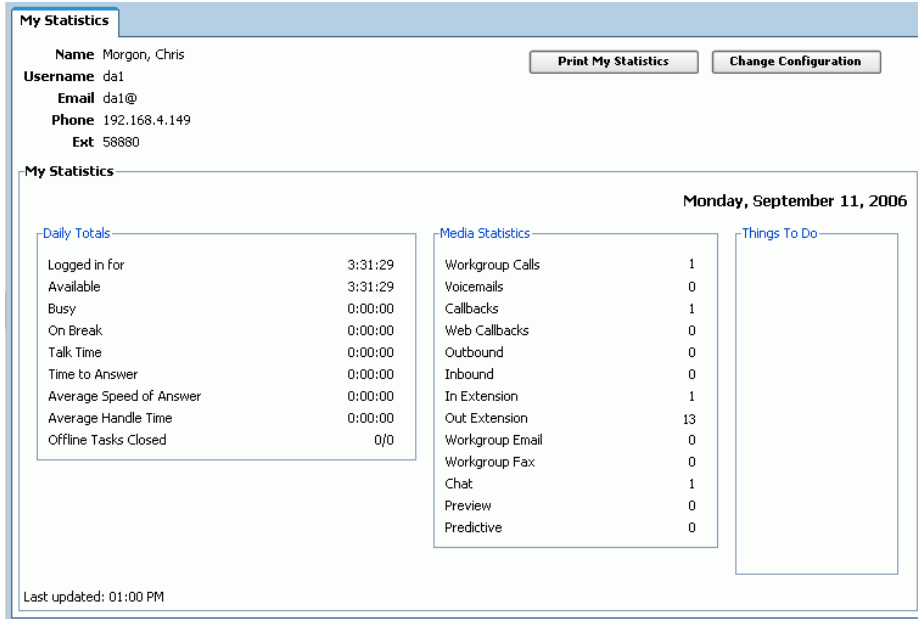


Figure 10. Example My Statistics Screen

Viewing Real-Time Statistics

From the Sidebar, click My Statistics. Your real time statistics appear in the workspace area of your screen. (These statistics are current up to the time displayed in the lower left corner.)

Refer to [Table 5](#) for a description of Daily Totals.

Daily Totals

The Daily Totals area shows how long you were working in IM (from when you logged in until midnight), the time you spent in each status, how long you took (on average) to answer interactions, and the number of offline messages you managed. [Table 5](#) provides a description for each column.

Table 5. Daily Totals

Column	Description
Logged in for	The total amount of time that you were logged into IM since 12:00 A.M. today. This timer starts when you login and stops when you logout. It is reset every day at midnight.
Available	Shows how long you have been in the <i>Available</i> state since 12:00 A.M. today.
Busy	How long you have been in the <i>Busy</i> state since 12:00 A.M. today.
On Break	How long you have been in the <i>On Break</i> state since 12:00 A.M. today.
Talk Time	The average time you spent talking on the phone since 12:00 A.M. today.
Time to Answer	This statistic shows how quickly, on average, you accepted interactions since 12:00 A.M. today.
Average Speed of Answer	This statistics show how long, on average, interactions waited in a queue before being answered.
Average Handle Time	This statistics show how much time, on average, you spent handling interactions since 12:00 AM today (including queue time and warp up time).
Offline Tasks Closed	The number of offline interactions you received and answered since 12:00 A.M. today.

NOTE: IM displays time in hours:minutes:seconds and performs updates every 15 minutes.

Media Statistics

Media Statistics tell you how many interactions of different types you accepted since 12:00 A.M. today.

For example, if Web Callback displays 4, it means that you accepted four Web Callback interactions since 12:00 A.M. today.

Here are the possible interaction types:

- Callbacks
- Chat
- In Extension

- Inbound
- Out Extension
- Outbound
- Predictive
- Preview
- Voicemails
- Web Callbacks
- Workgroup Calls
- Workgroup Email
- Workgroup Fax

Printing My Statistics

If you have a printer connected to your computer, you can click the Print my Statistics button. This opens the Printer box, where you can select a printer and printing options.

If you do not have a printer connect to your computer, you cannot print a copy of your statistics.

7

Managing Phone Interactions

This chapter explains the basic phone interactions (such as receiving calls, working on- or off-hook, transferring calls, recording calls, placing a caller on hold, sending a caller to voicemail, ending a call, and so on). Use this information along with [Chapter 17, “Managing Contacts”](#) which explains how to manage a contact once you have one. This chapter includes the following topics:

- [Accepting Calls](#)
 - [Receiving an ACD Call](#)
 - [Retrieving an ACD Voicemail from an Interaction History Record](#)
- [Working Off-Hook or On-Hook](#)
 - [Accepting a Phone Interaction While Working Off-Hook](#)
 - [Accepting a Phone Interaction While Working On-Hook](#)
- [Transferring Calls](#)
 - [Transferring an Internal \(Extension\) Call](#)
 - [Transferring an Incoming \(Outside\) Call to Another User or Workgroup](#)
 - [Using a Supervised Transfer](#)
 - [Using a Warm Transfer](#)
- [Recording Calls](#)
- [Disable Recording](#)
 - [Finding a Previously Recorded Interaction](#)
- [Placing a Caller on Hold](#)
- [Sending a Caller Straight to Voicemail](#)
- [Enabling Call Trace](#)
- [Ending a Call](#)
- [Assigning an Outcome](#)
- [Wrapping-Up an Interaction](#)
- [Using the Optional Hook Flash Feature](#)

CAUTION: CCA will not send you any interactions, unless your status is **Available**. Therefore, make sure to reset your status to **Available** whenever you are ready to accept a new interaction.

Accepting Calls

You can make and receive two basic types of phone calls: **Automatic Call Distribution (ACD)** and **Non-ACD Calls**.

- 1 Automatic Call Distribution (ACD) Calls:** This type of call occurs when the person is not calling your direct phone number or extension. Instead, they dial a number associated with your contact center and eventually the call is routed to you. ACD Calls include:
 - A customer who calls and is routed to your phone.
 - Web Callbacks and ACD Callbacks.
- 2 Non-ACD Calls:** This type of call occurs when the person is making 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/Outbound Extension Calls:* calls that you make to, or receive from, other extensions at your company.

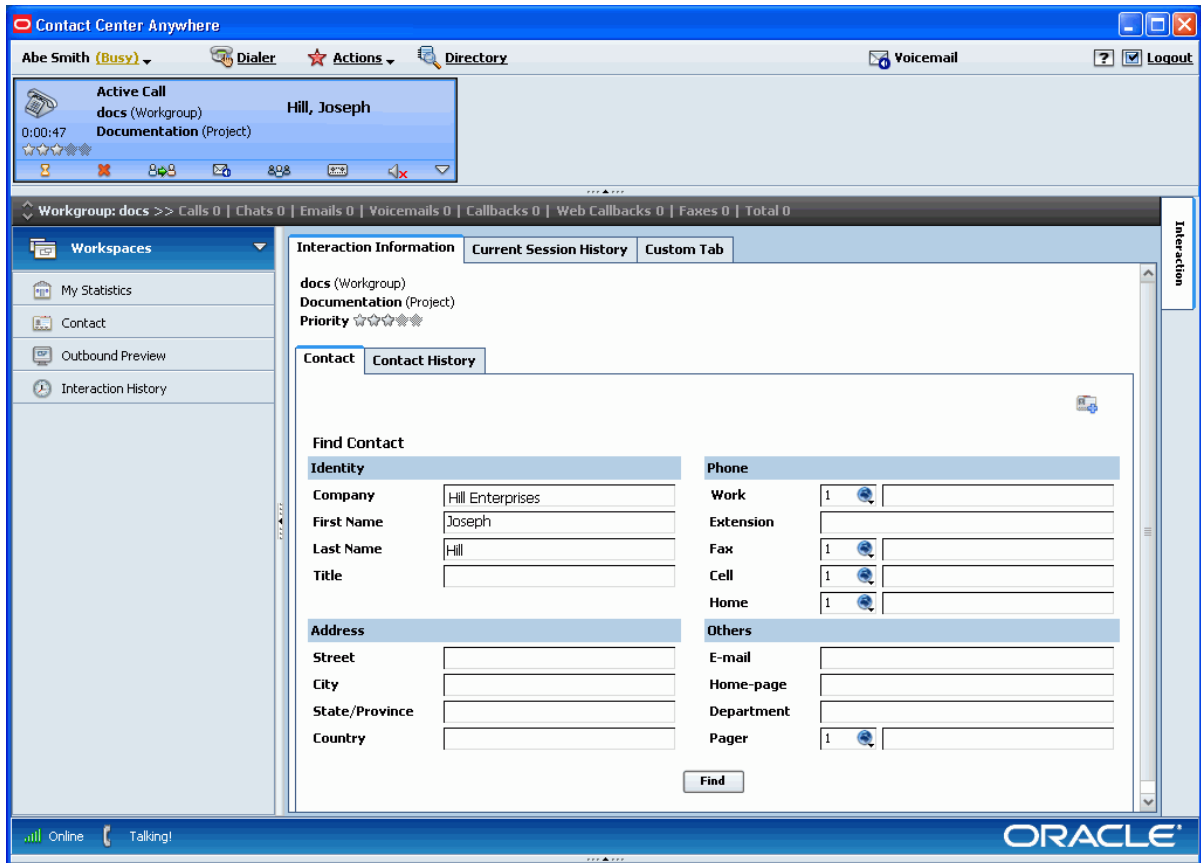
CAUTION: If you do not accept the ACD interaction before the **call time limit**, IM changes your status to **No Answer** and returns the interaction to the queue for the next **Available** agent.

Receiving an ACD Call

When you receive a new ACD call, the caller's information, if available, appears in the Interaction Control Bar.

- 1** Click the Accept icon. The Contact Information tab opens, showing contact information, if available.

- 2 Pick up your phone and begin speaking. Notice that the workspace opens to show the Interaction Information tab.



- 3 If this is an existing contact, the system displays the contact's name prominently in the Interaction Control Bar. Verify and complete the information.

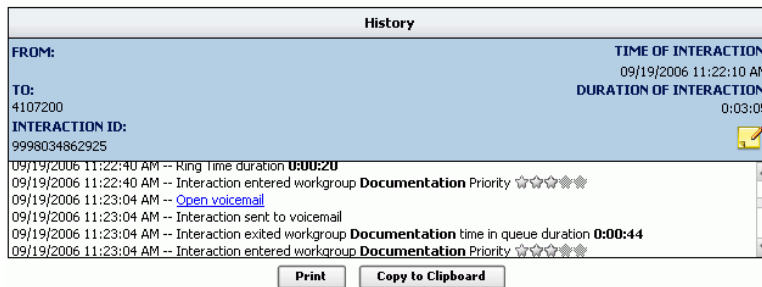
NOTE: If the contact does not already exist, then UNKNOWN appears in the place of the contact's name and you must enter new contact information or select a contact from a list of possible matches. Refer to [Chapter 17, "Managing Contacts."](#)

- a If this is a new contact, refer to ["Creating a New Contact Record" on page 128.](#)
- b Click the Contact History tab to view all previous interactions for this contact. (Refer to [Chapter 11, "Using Interaction History."](#))
- c If you have a Script, refer to ["Reading and Loading Scripts" on page 117.](#)

Retrieving an ACD Voicemail from an Interaction History Record

One way to retrieve an ACD voicemail message is from the Interaction History record.

- 1 Find the contact. (Refer to “Finding Contact Records” on page 125.)
- 2 View the Contact History. (Refer to “Deleting a Contact Record” on page 131.)
- 3 Double-click on an interaction record to open it. A hyperlink to a voicemail appears as an entry in the interaction record.



- 4 Click the Open Voicemail hyperlink. CCA opens your media player and the voicemail begins to play.

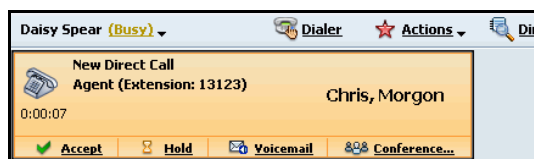
NOTE: It may take some time for your media player to open.

Working Off-Hook or On-Hook

You can accept a new call Interaction while working *off-hook* or *on-hook*:

- Working **Off-Hook** means that you are most likely using a headset, and that you connect to the system once. Then, instead of picking up the phone every time an interaction arrives, all you need to do is click the Accept icon in the Interaction Control Bar.
- Working **On-Hook** means that you will answer the physical phone every time that it rings.

When you receive a new phone Interaction, Interaction Manager displays the caller’s phone number, if available, in the Interaction Control Bar, in an active call window.



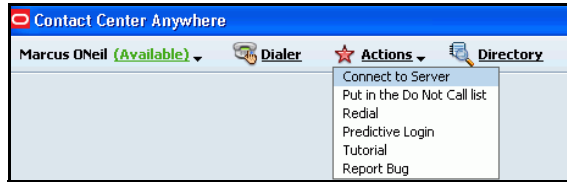
If you do not accept a phone interaction before the *call time limit*, IM changes your status to *No Answer* and puts the interaction back into the queue for handling by the next *Available* agent.

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.

The On-Hook or Off-Hook phone status icon appears in the Bottom Bar.

Accepting a Phone Interaction While Working Off-Hook

- 1 After logging into IM, click the Actions link on the Toolbar to open the actions drop-down list.

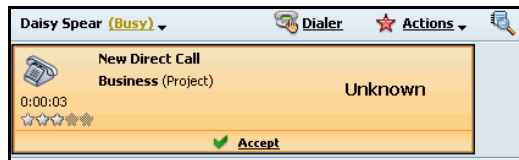


- 2 Select Connect to Server.

The off-hook icon appears in the Bottom Bar area, indicating that you are now working off-hook and are ready to accept new call.



When a call arrives, IM sounds a beep and displays the Active Call window in the Interaction Control Bar.



- 3 Click the Accept link and begin speaking.
 - 4 If the phone number is already in the system along with contact information, the system automatically retrieves the contact’s name and displays it in the Interaction Control Bar. If the system cannot find the contact, the word *UNKNOWN* appears instead, reminding you to create a new contact or find a match from a list of possibilities. (Refer to [Chapter 17, “Managing Contacts.”](#))
- Notice that the action icons (*Hold, Disconnect, Transfer, Voicemail, Conference, and Mute*) are now available.

Hold	Places the caller on hold. (Refer to “Placing a Caller on Hold” on page 64.)
Disconnect	Hangs up the telephone. (Refer to “Placing a Caller on Hold” on page 64.)
Transfer	Routes a call to an agent, workgroup, or an external number. (Refer to “Transferring Calls” on page 57.)

Voicemail	Sends the caller directly to voicemail. (Refer to “Sending a Caller Straight to Voicemail” on page 65.)
Conference	Lets you add additional people to a call. (Refer to “Creating and Joining Conference Calls” on page 71.)
Recording	If configured, you can record the interaction. (Refer to “Recording Calls” on page 62.)
Mute	Prevents the caller from hearing you. (Refer to “Muting and Unmuting Your Workstation” on page 74.)

Each Time a New Phone Call Arrives

Each time a new phone call arrives, these events occur:

- a New Call window appears in the Interaction Control Bar,
- the orange color identifies the call as new,
- the Accept link is available in the New Call window, and
- the phone line status (in the Bottom Bar) displays a Ringing icon.

Accepting a Phone Interaction While Working On-Hook

- 1 Click the Accept link (in the New Call window).
 - The orange New Call window changes to a blue Active Call window.
 - Action icons (*Hold*, *Disconnect*, *Transfer*, *Voicemail*, *Conference*, and *Mute*) become available.
 - The caller's information (such as name, phone number, priority, and so on) appears in the window (if known). If the caller is not known, IM displays UNKNOWN in the place of the caller's name.
- 2 Begin speaking.

Transferring Calls

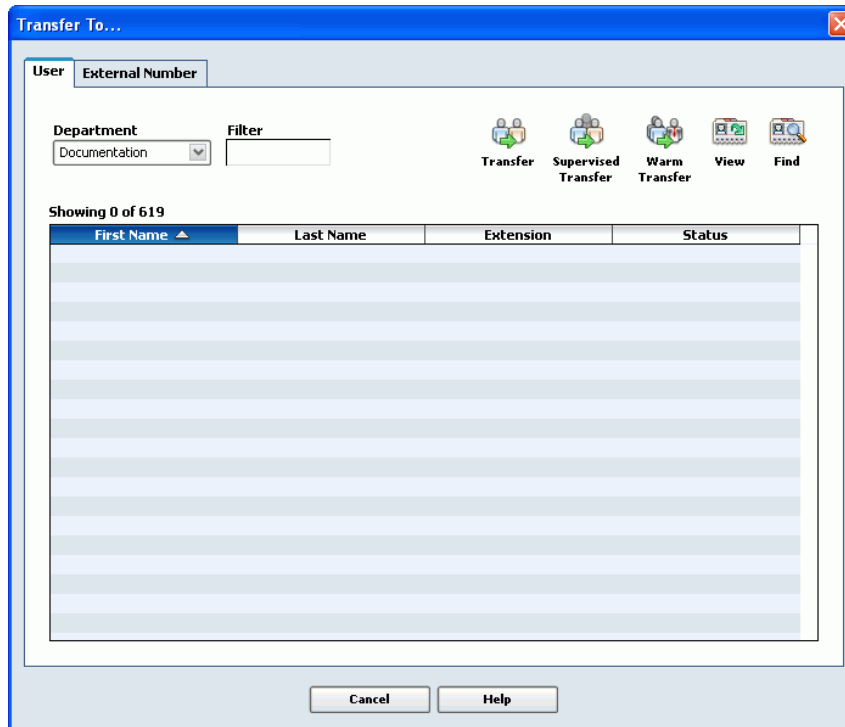
You can transfer an Active Call to another user or an external phone number using a *Transfer*, a *Supervised Transfer*, or a *Warm Transfer*:

Transfer	<p>Transfer an Active Call directly from yourself to someone else. This is sometimes called a <i>Blind Transfer</i> or <i>Cold Transfer</i>.</p> <p>NOTE: If you are not available to handle the call, the system may route the call to your voicemail.</p>
Supervised Transfer	<p>Use a Supervised Transfer to speak to the person who is to receive the transferred Active Call without the caller hearing you. This way, you can provide the caller's name and other useful information.</p>
Warm Transfer	<p>Use a Warm Transfer to conference everyone - you, the Active Caller, and the person to whom you are transferring the call (such as <i>Agent 2</i>). This way, you can stay on the line as long as necessary.</p> <p>In addition, you can select the Leave button to remove yourself from the conference and let the caller and <i>Agent 2</i> continue talking.</p> <p>NOTE: When transferring a call to another user, look at the information in the Presence column of the Transfer To dialog box to determine the current state of the user (who is in the same partition as you). Refer to "Transferring an Internal (Extension) Call" on page 58.</p>

CAUTION: Once you are already in a conference, the only options are to Pull Out or Disconnect.

Transferring an Internal (Extension) Call

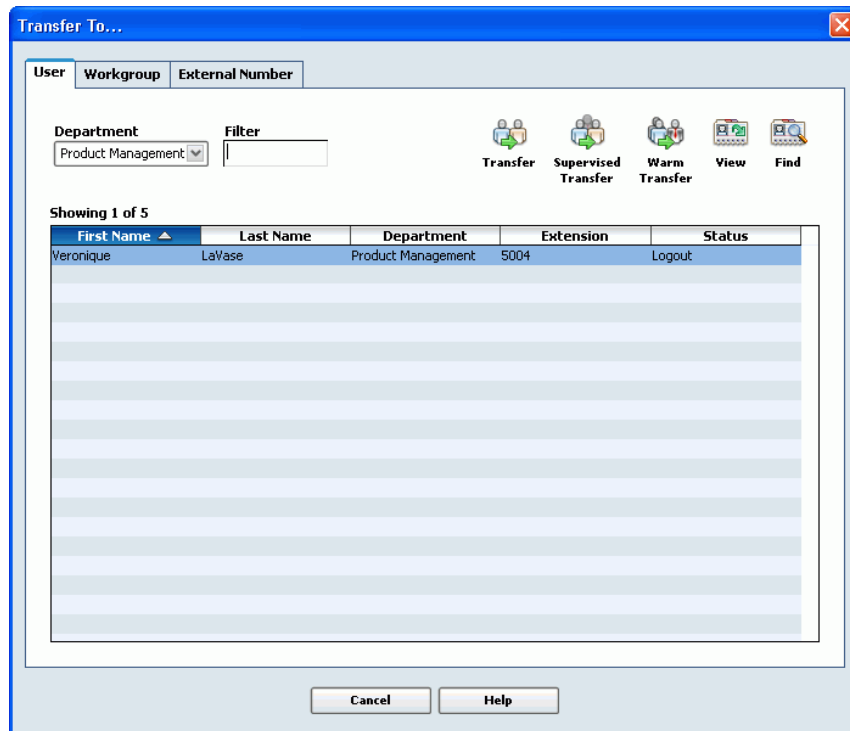
- 1 From Active Call window in the Interaction Control Bar, click the Transfer icon. The Transfer To box opens.



- 2 Find and select a user from the list. (Refer to [“Finding Anyone \(Example Searches\)”](#) on page 43.)
- 3 Click the Transfer icon. The system transfers the call and the interaction disappears from the Interaction Control Bar.

Transferring an Incoming (Outside) Call to Another User or Workgroup

From the Active Call window in the Interaction Control Bar, click the Transfer icon. The Transfer To box opens, providing a User tab, a Workgroup tab, and an External Number tab.



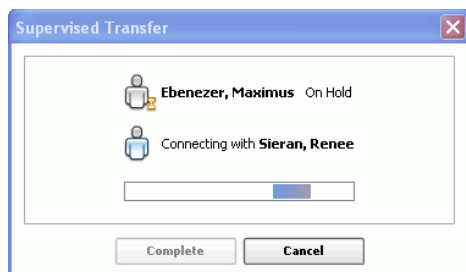
- 1 Click the Workgroup tab. A list of workgroups appears belonging to a partition or a company (if partitions are not in use).
 - TIP:** You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a drop-down country selection box and a box where you type the outside phone number.
- 2 Find and select the desired workgroup.
- 3 Click the Transfer icon.
 - a If required, the Outcomes box appears, providing a list of outcomes. In addition, the Active Call window turns grey and displays *Selecting Outcome*.
 - b Select an outcome and click the Select button. The active area now displays *Wrap-up*, if the wrap up time is longer than the selecting outcome time.
 - c Click the End Wrap-up icon. The active call area for this interaction closes.

Using a Supervised Transfer

Use a Supervised Transfer to speak to the person who is to receive the transferred call without the caller hearing you. This way, you can provide the caller's name and other useful information:

- 1 From the Active Call Window in the Interaction Control Bar, click the Transfer icon. The Transfer To box opens.
- 2 Select the User tab. A list of users appears.

TIP: You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a drop-down country selection box and a box where you type the outside phone number.
- 3 Find and select a user from the list. (Refer to [“Finding Anyone \(Example Searches\)”](#) on page 43.)
- 4 Click the Supervised Transfer icon. The system places the original call on hold and a box appears showing the name of the person on hold and the name of the person being connected, along with a progress bar. The following shows an example.



When the system makes the connection, the box refreshes to show the caller still on hold but the person to whom you transferred the call is now Active and the Complete button becomes available.



- 5 Tell the person who is receiving the call any information about the caller that may be useful.
- 6 Click the Complete button. IM transfers the call, the box closes, and the interaction no longer appears in your Interaction Control Bar or workspace.

Using a Warm Transfer

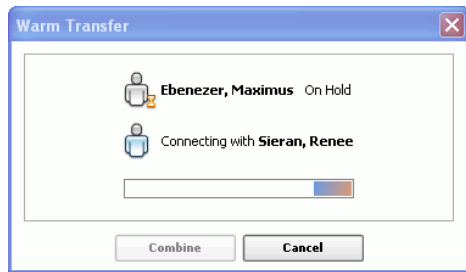
Use a Warm Transfer to conference everyone - you, the caller, and the person to whom you are transferring the call (such as *Agent 2*). This way, you can stay on the line as long as necessary. In addition, you can select the Leave button to remove yourself from the conference and let the caller and *Agent 2* continue talking.

- 1 From the Active Call window in the Interaction Control Bar, click the Transfer icon. The Transfer To box opens.

- 2 Select the User tab.

TIP: You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a drop-down country selection box and a box where you type the outside phone number.

- 3 Find and select a user from the list, such as Agent 2. (Refer to “Finding Anyone (Example Searches)” on page 43.)
- 4 Click the Warm Transfer icon. The system places the original caller on hold. A box appears showing the name of the caller on Hold and Agent 2 along with a connecting progress bar. The following shows an example.



When the system makes the connection to Agent 2, the box refreshes to show the caller still on *Hold* but now Agent 2 is *Active*. Also, notice that the *Combine* button becomes *Available*.



- 5 You can now talk to Agent 2, without the caller hearing your conversation, and look at all available interaction information.

- 6 Click Combine. The caller's ID appears on Agent 2's screen and everyone can talk in conference. The box refreshes to show that both the caller and Agent 2 are now *Active*. In addition, a Leave button appears.



- 7 If desired, click the Leave button to disconnect yourself from the conference. Agent 2 and the caller still remain connected in conference.

Recording Calls

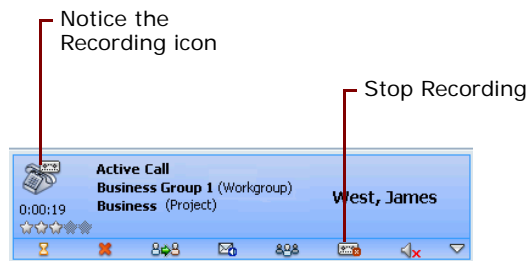
If configured, IM lets you record any incoming ACD call, using the Start Recording icon in the Active Call Window. You can, for example, record a call to confirm a transaction.

CAUTION: You can only record *Incoming ACD* calls. The system does not allow recording of *Direct Outbound* calls, *Direct Inbound* calls, or *Extension* calls.

- 1 From the Active Call window in the Interaction Control Bar, click the Start Recording icon. The following shows an example.



The telephone icon now includes a picture of a tape and the Stop Recording icon replaces the Start Recording icon.



2 When you want to stop recording, simply click the Stop Recording icon.

NOTE: If you already started a *Call Trace* and the caller requests to not be recorded, then recording the call immediately stops when you select **Do Not Record**.

TIP: Refer to “Enabling Call Trace” on page 65.

Disable Recording

This option appears in the Interaction drop-down list and, when selected, immediately stops a transaction recording, quality recording, or call trace (emergency recording).

NOTE: The system can be configured to allow recording when a contact is not assigned. If so, the recording action will be available from the interaction control.

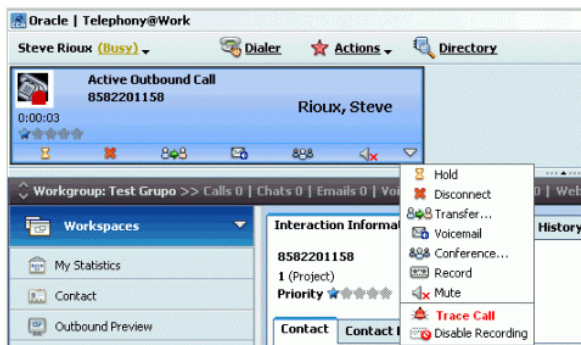


Figure 11. Disable Recording

Finding a Previously Recorded Interaction

You can find a previously recorded interaction by accessing the Contact tab or the Interaction History tab from IM’s Sidebar. (For more about using these tabs, refer to “Managing Contacts” on page 121 and “Using Interaction History” on page 93.)

Placing a Caller on Hold

Click the Hold hourglass icon (Figure 12) in the Active Call window (or click the drop-down arrow and then select Hold from the list).

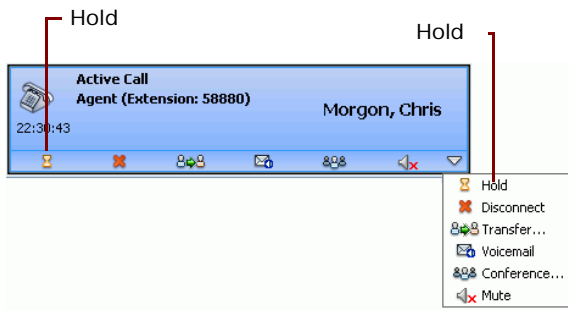
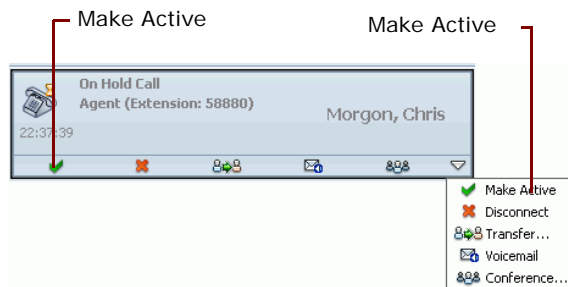


Figure 12. Hold

While on hold and if your system is configured for it, the caller may hear music.

A quick way to check if the caller is on hold is to look for the following changes to the call window:

- The Active Call window changes to the On Hold Call window,
- the color of the window changes from blue to grey,
- the telephone icon changes to show a phone plus an hourglass,
- a green check mark (active) appears in place of the Hold icon, and
- the drop-down list changes from Hold to Make Active.



To take the call off hold and make it active again, simply click the Active icon (green check mark) or click the Make Active choice from the drop-down list.

Sending a Caller Straight to Voicemail

Click the Voicemail (Figure 13) in the Active Call window (or click the drop-down arrow and then select Voicemail from the list).

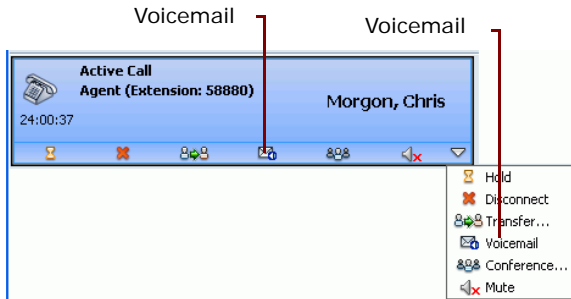


Figure 13. Send to Voicemail

A quick way to check if IM sent the caller to voicemail is to look for the following changes to the call window (Figure 14):

- The Active Call window changes to the Voicemail window,
- The color of the window changes from blue to grey,
- The voicemail icon is no longer an action option,
- A green check mark (active) appears in place of the Disconnect icon, and
- The drop-down list no longer has a Voicemail option.



Figure 14. Caller Sent to Voicemail

To make the call active again before the caller hangs up, simply click the Active icon (green check).

Enabling Call Trace

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

- 1 From the Interaction drop-down list, select Call Trace (Figure 15), which turns Red showing it is active.

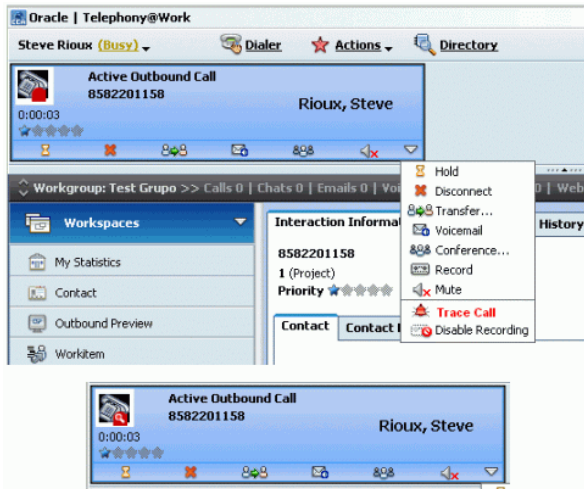


Figure 15. Call Trace

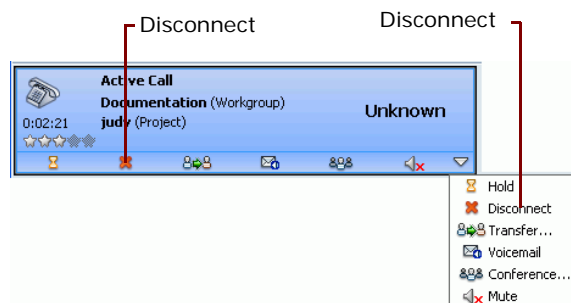
- 2 Click Yes to confirm the “Are you sure?” message. The recording begins and a Phone icon appears with a red dot next to the phone, flashing alternately with the white magnifying glass in the center.
- 3 Once the trace has been successfully sent, the flashing stops.

NOTE: If the caller asks not to be recorded, click Disable Recording from the Interaction Control drop-down list and CCA immediately stops the trace.

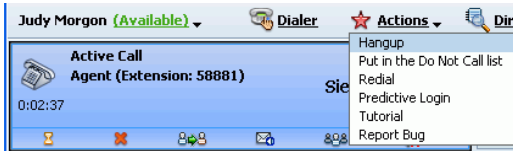
Ending a Call

There are two ways to end (disconnect) a call:

- You can end a call by selecting clicking the Disconnect icon in the Active Call window or clicking Disconnect from the drop-down list.



- You can also select the Active Call window and then select Hang-up from the Action drop-down list.



Assigning an Outcome

In some cases, you may be required to assign an *outcome* to an interaction after you finish with the caller. An outcome describes the result of a call or callback. Example outcomes include *Sale*, *Request for Literature*, *Request for Product Change*, and so on.

If you are required to assign an outcome, then the Active Call window will automatically change to the Selecting Outcome window (Figure 16) after you disconnect the interaction.

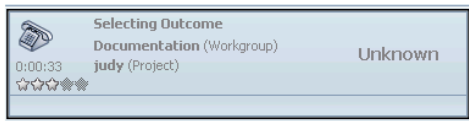


Figure 16. Selecting Outcome

In addition, an Outcomes dialog box (Figure 17) opens so that you can select an outcome from the drop-down list.

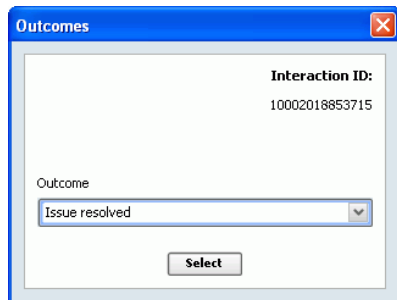


Figure 17. Outcomes Dialog Box

Both the Selecting Outcome window and the Outcomes dialog box disappear after you select and outcome and click the Select button, unless you have additional wrap-up time.

Wrapping-Up an Interaction

If configured, your administrator may allow time after disconnecting from an interaction before IM is allowed to send you another phone interaction. This time (wrap-up time) is for taking care of different tasks, such as completing a form, updating a contact record exists, making sure a contact record exists, and so on.

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.

- To IM, your status remains *Busy* while you are in Wrap-Up, even though your status may display *Available*. When Wrap-Up ends, IM automatically changes your status to *Available*.

NOTE: While you are in Wrap-up, IM may send an offline interaction (such as chat or email), if you are configured to handle multiple interactions.

Wrap-up begins when you finish the call and the contact hangs up.

When wrap-up begins:

- The call window changes to Wrap Up (Figure 18),
- The color changes from blue to grey, and
- The only available action item is End Wrap-up.

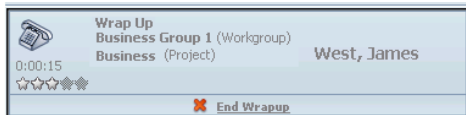


Figure 18. Wrap-Up Window

The window will disappear when your wrap-up time reaches its limit and IM will be allowed to send you a new interaction from the queue, if one exists.

If you finish before your time limit, you can click the End Wrap-up action to immediately become available for new phone interactions.

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

If, however, you are in the process of creating or updating a contact and you or the customer disconnects before you finish, wrap-up automatically begins. The system prompts you to save your work and stop, or continue (Figure 19) entering information.

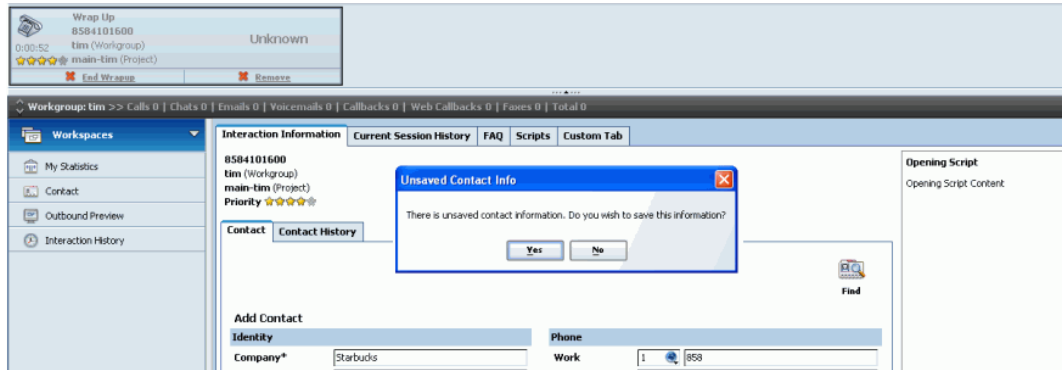


Figure 19. Save or Continue

When you finish adding information, click End Wrap up, and then click **Remove** (Figure 20) to remove the interaction from the Interaction Control Bar.

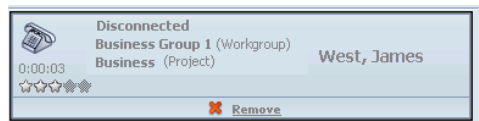


Figure 20. Remove Option

Using the Optional Hook Flash Feature

Hook is a telephone feature that simulates a quick 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 with 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 pick up 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.”

8

Creating and Joining Conference Calls

This chapter explains how to create and join a conference call. Conference calls allow several people to communicate simultaneously. Once you create a conference, you can exit the conference to answer other calls, then return to the conference, or exit permanently while the other participants continue speaking. Each user is allowed to create a conference. The number of members is limited by the system configuration.

CAUTION: Before you can create a conference, you must have at least one **Active** interaction.

This chapter includes the following topics:

- [Creating a Conference](#)
- [Exiting a Conference](#)
 - [Exiting a Conference You Initiated](#)
 - [Exiting a Conference You Did Not Initiate](#)
- [Joining a Conference](#)
- [Removing a Caller from a Conference](#)
 - [Removing a Caller Using the Conference Call Window](#)
 - [Removing a Caller Using the Conference Tab](#)
 - [Removing All Callers from the Conference](#)
- [Re-Inviting a Caller Back to a Conference](#)
- [Muting and Unmuting Your Workstation](#)

Creating a Conference

- 1 Select the caller to put into a conference.
- 2 From the Active Call window in the Interaction Control Bar of the person you called (or called you), click the Conference icon.
 - The Active Call window changes to display Conference (first in grey and then back to blue).
 - *Exit*, *Disconnect All*, and *Mute* become available.
 - The number of participants appears as 1, and you and the caller can hear each other.

Adding Multiple Callers to a Conference

- 1 Create a conference and then call another prospective conference participant using the Dialer or the Company Directory. (Refer to [“Creating a Conference.”](#))

- The first Active Call window moves to the right and a New Active Call window appears, showing the name of the second person you called.
- 2 Click the Conference icon from the Active Call window of the new call.
 - The new Active Call window changes to display *Conference* (first in grey and then back to blue).
 - *Exit*, *Disconnect All*, and *Mute* become available.
 - The number of participants appears as 2 and all three participants can hear each other.
 - 3 If desired, click anywhere in the Conference box to open the Conference tab in your workspace, which displays each participant's name and phone number.

or

Click the Conference box down arrow to view each participant's name and phone number.

NOTE: Use the scroll bar or click and drag the participants box boarder to expand the size of the box to see all information.

Exiting a Conference

When you are in a conference call, the Interaction Control Bar displays a Conference window showing the number of participants.

NOTE: To view the person who initiated the call, click anywhere in the Conference window. The Interaction Information tab opens in your workspace to show you information about the person who initiated the conference.

There are two ways to exit a conference, depending on whether you initiated the conference or simply joined one.

Exiting a Conference You Initiated

- 1 From the Conference window, click the Exit link:
 - The Conference box appears grey to indicate you are no longer in the conference.
 - The number of participants still appears in the grey box and the available links change to Join and Disconnect All.
- 2 Click anywhere in the grey Conference box to open the Conference tab in your workspace, where you can still see who is in conference and their phone numbers.

Exiting a Conference You Did Not Initiate

From the Active Call window, click the Disconnect icon or select the down arrow and then Disconnect.

Joining a Conference

NOTE: You can only join a conference if you are invited by the person who initiated the conference.

If you initiated the conference and then exited it, you can re-enter (re-join) by selecting the Join icon.

- 1 After you exit your conference, the Conference box turns grey, still shows the number of participants, and now displays a Join icon and a Disconnect All icon.
- 2 Click the Join icon. The Conference box turns blue and the available icons are now *Exit*, *Disconnect All*, and *Mute*.

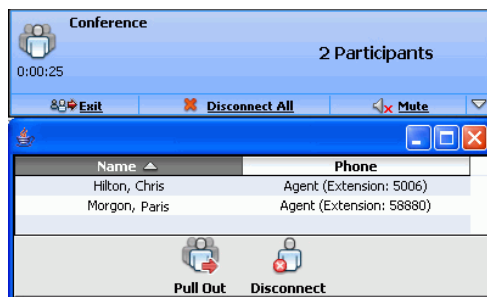
Removing a Caller from a Conference

In some cases, you might want to have a solo conversation with a conference call participant without disturbing the rest of the parties on the call. You can do this two ways: From the Conference Call window or from the Conference tab, which appears in your workspace.

CAUTION: You can remove a caller only from a conference you *initiated*.

Removing a Caller Using the Conference Call Window

- 1 From the Conference Call window in the Interaction Control Bar, click the drop-down arrow. A box displaying the names and phone numbers of all call participants appears.



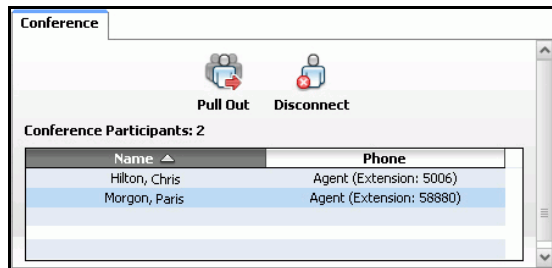
TIP: Use the scroll bar or click and drag a box boarder to expand the box, displaying all information.

- 2 Highlight the person to remove from the conference and click either the Pull-Out or Disconnect icon:
 - a Select Pull-out to remove the participant from the conference but keep their connection so that they may re-join the conference.
 - b Select Disconnect to remove the participant from the conference and close their connection, so that they cannot re-join the conference.

IM removes the person from the conference, a New Active Call window appears, and the Conference Call window changes to show one less participant.

Removing a Caller Using the Conference Tab

- 1 From the Conference tab (in your workspace), highlight the person to remove from the list of participants.



- 2 Click either the Pull-Out or Disconnect icon.
 - a Select Pull-out to remove the participant from the conference but keep their connection so that they may re-join the conference.
 - b Select Disconnect to remove the participant from the conference and close their connection, so that they cannot re-join the conference.

CCA removes the person from the conference, a new Active Call window appears in the Interaction Control Bar, and the Conference Call window changes to show one less participant.

Removing All Callers from the Conference

From the Conference Call window in the Interaction Control Bar, click the Disconnect All link. CCA removes everyone from the conference and closes the Conference box and tab.

Re-Inviting a Caller Back to a Conference

If you selected Pull-Out to remove a conference participant from a Conference call, then to add the caller back into the conference, simply click the Conference icon.

If you selected Disconnect to remove a conference participant from a Conference call, then to add the caller back into the conference, you must first dial the caller again to establish a connection.

Muting and Unmuting Your Workstation

There may be times, especially during a conference, when you may need to block out background noise that might be distracting to others. Do this using the Mute feature.

Muting Your Workstation

From the Active Call window in the Interaction Control Bar, click the Mute icon. [Figure 21](#) shows an example.

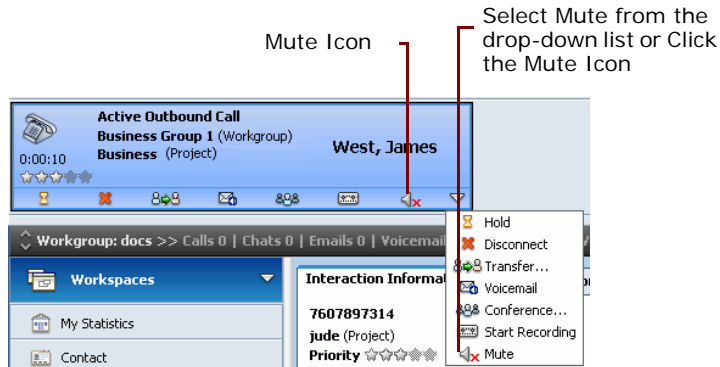


Figure 21. Call Not Muted

The Mute icon changes to Unmute and other listeners can no longer hear any background noise. [Figure 22](#) shows an example.

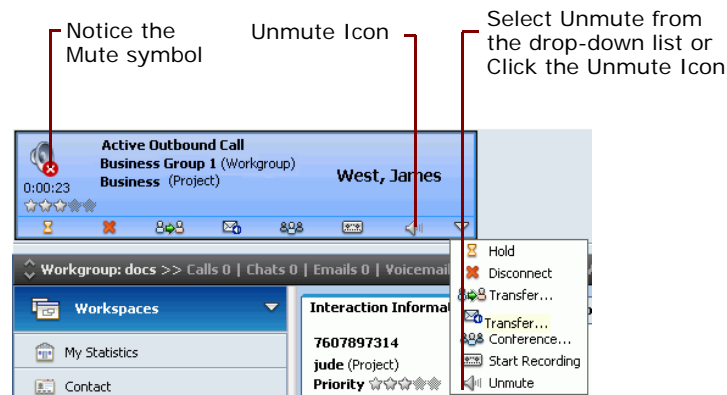


Figure 22. Call On Mute

Unmuting Your Workstation

In the Active Call window (in the Interaction Control Bar), click the Unmute icon. The Unmute icon changes to Mute and the caller(s) can now hear you speaking.

9

Managing Chat Interactions

This chapter explains how to handle *Web-based chat* and *Intelligent chat* interactions:

- Web-based chat is real-time communication between two users using a computer. Once a chat is initiated, either user can enter text by typing on the keyboard. The entered text appears on the other user's monitor.
- Intelligent chat uses keyword matching to find recommended chat responses based on matching relevance scoring.

This chapter includes the following topics:

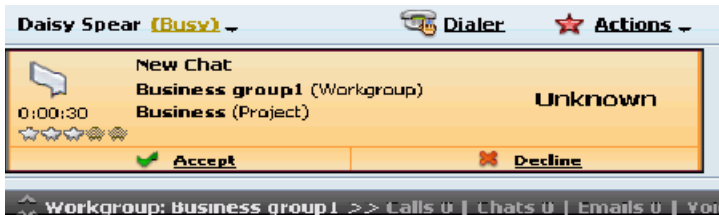
- [Receiving a New Chat Interaction](#)
- [Accepting a Chat](#)
- [Sending a Chat Text Message](#)
- [Using Chat Cobrowsing](#)
- [Pushing a Pre-Defined Web Address \(URL\)](#)
- [Pushing a Unique Web Address \(URL\)](#)
- [Sending a Prepared Response \(Intelligent Chat\)](#)
- [Receiving a Chat from Your Supervisor](#)
- [Transferring a Chat to Another Workgroup or Agent](#)
- [Ending a Chat Session](#)

Receiving a New Chat Interaction

Normally, a customer will request a chat by completing a form created by an administrator. The form may request some or all of the information shown in this example:

CCA uses the customer’s email address to automatically send a new chat to an available agent.

When you receive a new chat interaction, IM notifies you by displaying the interaction information in a New Chat window in the Interaction Control Bar.



The system attempts to automatically assign a contact based on the email address for chats. The name that displays in the window is the contact’s name (if assigned) or UNKNOWN if not assigned.

CCA populates the customer information entered in the Create Contact tab to help you create a new contact for this interaction.

If configured for your system, you can handle multiple chat interactions simultaneously up to a limit set by your system administrator.

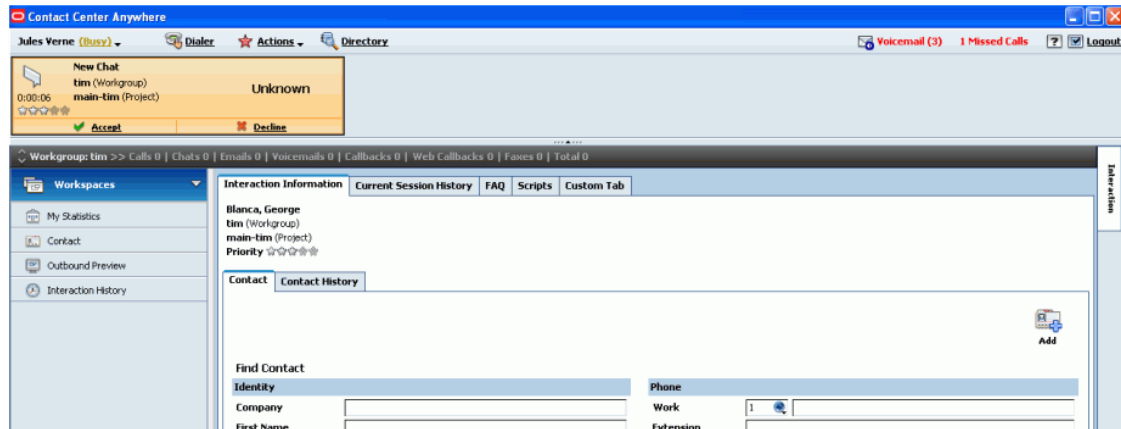
NOTE: You must click *Accept* within **one minute** or else IM will change your status to *No Answer* and move the interaction back into the queue for the next Available agent.

NOTE: If you already accepted a chat interaction, you may make yourself available to accept a phone interaction by manually selecting Available from the Status drop-down list.

Accepting a Chat

- 1 From the Interaction Control Bar, click the Accept icon in the New Chat window.

NOTE: You must click Accept within *one minute* or else IM will change your status to *No Answer* and moves the interaction back into the queue for the next Available agent.

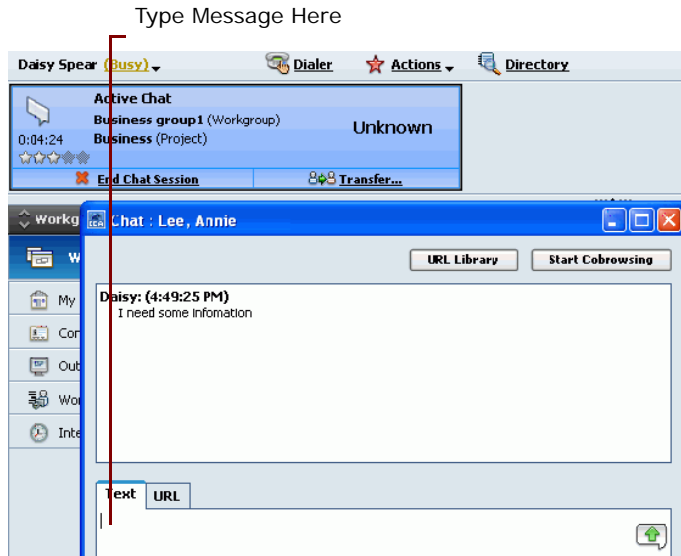


A Chat page opens showing the person's name (if known), your system time, and their text message. IM uses a Chat Template, if configured, and enables the Chat Response button.

- 2 If CCA cannot find the contact, create a new one. CCA helps you by using the information provided by the customer's chat request to begin populating the contact information page. (Refer to [Chapter 17, "Managing Contacts."](#))
- 3 You can respond several different ways:
 - Send a text message
 - Share Web pages back and forth
 - Push a pre-defined URL
 - Push a unique URL
 - Select a pre-defined chat response based on a Chat Template

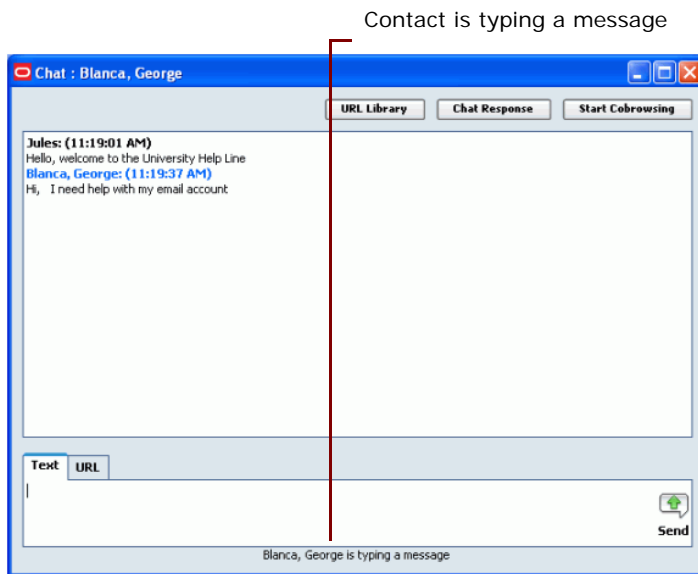
Sending a Chat Text Message

- 1 From the bottom of the Chat page, in the Text tab, type your text message response.



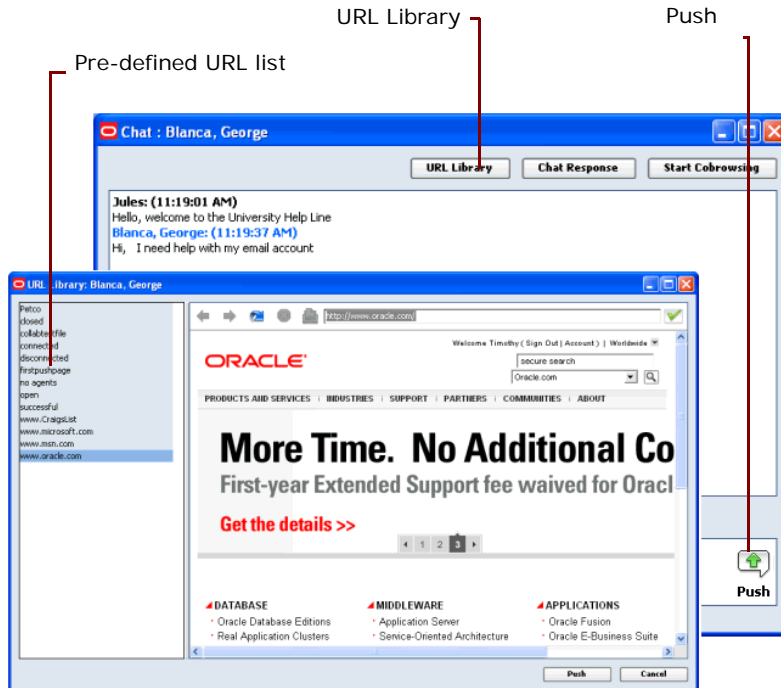
- 2 Click Send. Your response appears in the chat box.

NOTE: Notice that the contact's first name and last name appear when the contact is typing a message.



Pushing a Pre-Defined Web Address (URL)

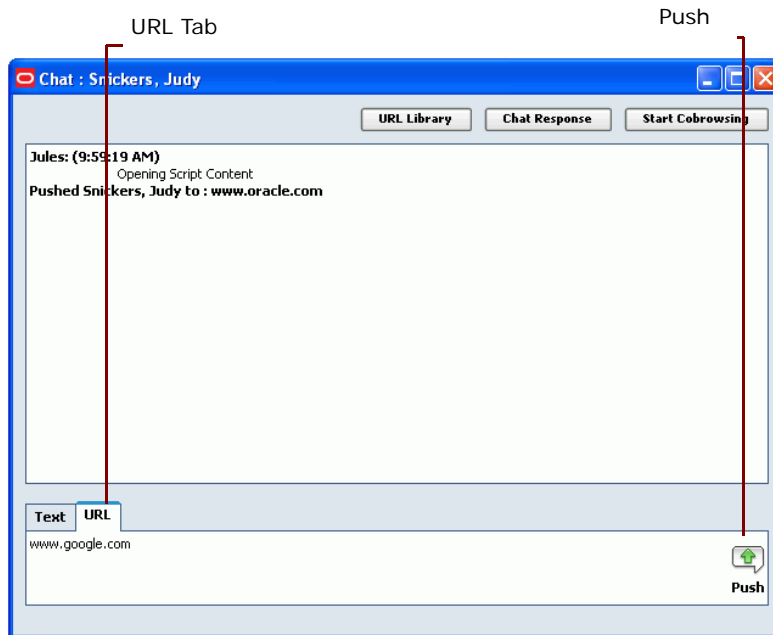
- 1 Click the URL Library button. A list of pre-defined addresses (URLs) for various Web pages appears.



- 2 Review and double-click on the most appropriate URL to give to the customer.
- 3 Click Push to forward your selection to the customer.

Pushing a Unique Web Address (URL)

- 1 From the bottom of the Chat page, click the URL tab.



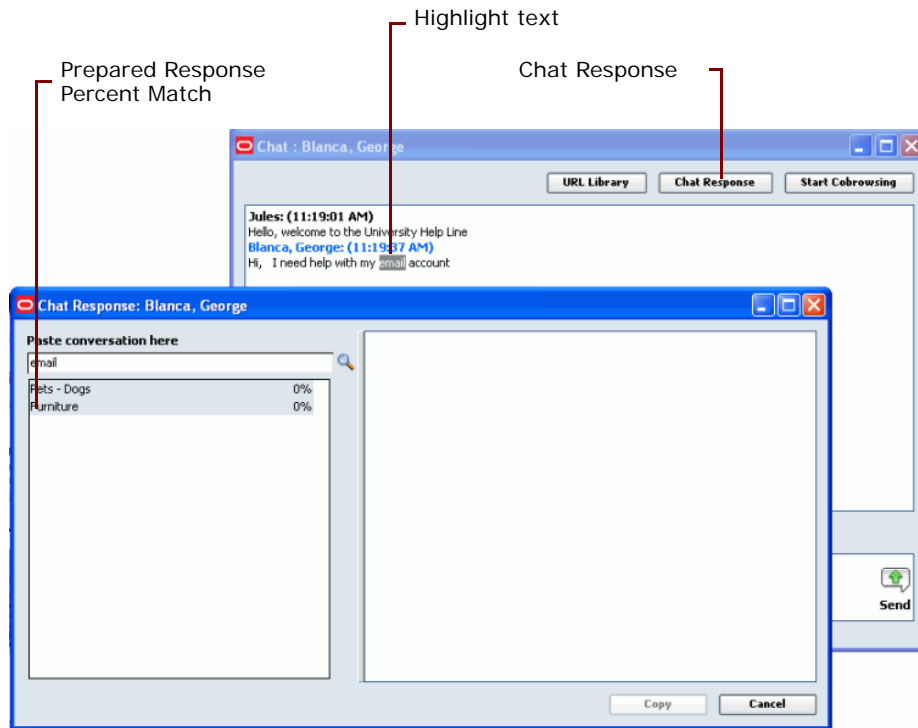
- 2 Type the unique Web address and then click Push.

Sending a Prepared Response (Intelligent Chat)

You can use the Chat screen to send helpful content supplied by your administrator to the customer.

- 1 In the Chat page, highlight specific text which the customer typed (such as a product name, product type, and so on).

- 2 Click the Chat Response button.



IM attempts to match the highlighted text to a pre-defined patterns stored in library templates. One or more matching templates may appear. (Each displays a percentage match in the upper right corner, based upon how closely the customer's specific words match the key words in the template.)

NOTE: If there is no score, or a low score, you can scroll through the templates to determine which information is appropriate for your customer.

- 3 Click on a template to review it and then you can:
 - a Cut and paste information from the template into the text area of the Chat page.
 - b Highlight the text and click Copy (located on the bottom of the screen) to send the text to the customer.
- 4 Click the Send to button. IM sends the information to the client and displays it in the message window.

Using Chat Cobrowsing

You and the customer can share Web page URLs back and forth.

Select the Start Cobrowsing button. A browser window opens showing the URL you want the customer to see.

Now, any change you or the customer makes appears in both yours and the customer's browser window.

Receiving a Chat from Your Supervisor

When you receive a chat interaction from your supervisor, IM notifies you by displaying the interaction information in the Interaction Control Bar. A chat page opens showing your supervisor's name, the system time, and a text message.

From the bottom of the chat page, in the Text tab, type your text message response. Your supervisor can see that you are in the process of typing and knows you have seen the message, since your first and last names appear in a *typing message*. When finished, click Send.

CAUTION: You cannot refuse to accept a Supervisory Chat and you can only respond by text messaging.

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.

- 1 In the Active Chat window, click Transfer. The Transfer dialog box opens.
- 2 Double-click on the name of an agent and then click the Cancel button to close the Transfer dialog box:
 - CCA removes the chat interaction from the Interaction Control Bar.
 - 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, IM transfers the customer back to you.

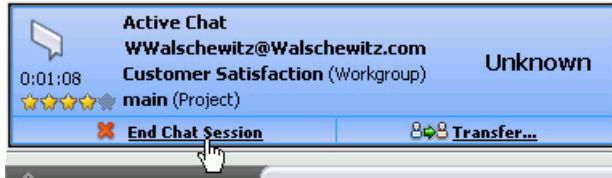
Ending a Chat Session

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.

IM saves the interaction to the database, even if the contact is not assigned, with UNKNOWN as the contact's name. Thus, it is better to assign contact information, which makes retrieving the chat history much easier. (Refer to ["About How Contacts Are Assigned" on page 132.](#))

- 1 Type a message to the customer indicating you are finished chatting and click Send.

- 2 In the Interaction Control Bar, click the End Chat Session link.



10 Managing Email Interactions

This chapter explains how to handle email interactions. This chapter includes the following topics:

- [Accepting an Email Interaction](#)
- [Responding to an Email](#)
- [Returning a Unique Email Response](#)
- [Transferring the Email Interaction to Another Agent or Workgroup](#)
- [Sending a Prepared Email Response](#)
- [Disconnecting an Email Interaction](#)

Accepting an Email Interaction

Depending upon your system configuration, you may be able to handle multiple email interactions. CCA sends email interactions automatically to an available agent, based on the contact's email address. When you receive an email interaction:

- IM notifies you by displaying the email interaction in the Interaction Control Bar or by playing a sound. (For more about sound, refer to ["Identifying How to Be Notified \(for New Interactions\)"](#) on page 29.)
- IM also displays the sender's name (if known) and email address in the Interaction Control Bar. If IM cannot find the sender's name, UNKNOWN appears.
- The Contact tab opens in your workspace showing all known information about the contact (if a Contact record exists in the database associated with the email header information).

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

Figure 23 shows an example of a new email interaction display in your Interaction Control Bar.

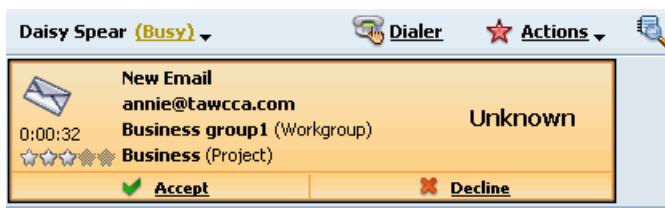
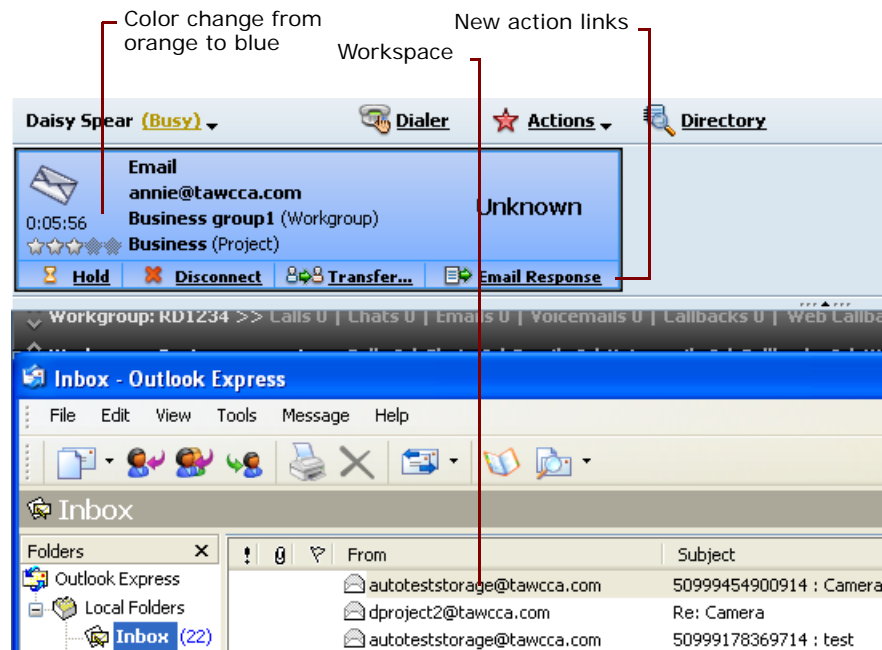


Figure 23. Example New Email Interaction

- 1 Click Accept from the Interaction Control.

The Email Interaction window updates, changes color, and provides new action links (*Hold*, *Disconnect*, *Transfer*, and *Email Response*). The following shows an example.



IM also launches your email client and displays the email message in your email program.

- 2 Now, you can:
 - Send a prepared email response from an Intelligent Email Template
 - Return a unique email response
 - Transfer the email interaction to another agent or workgroup

Responding to an Email

It is important to respond to email messages routed to you by IM. If you accept an email interaction, but do not reply to the interaction within the time allotted by your administrator, IM 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, IM will **NOT** deliver your reply to the customer.

- 1 Click Accept. IM launches your email client program.

- 2 If a contact record was not assigned to this customer, create and assign the contact record now. (Refer to [“Creating a New Contact Record”](#) on page 128.)

NOTE: To save the interaction history for this email, it is best to assign a contact record *before* you send your response. (If a contact record exists for the email customer, it is easier to retrieve the interaction history for the customer, since IM saves the record using UNKNOWN instead of the customer’s name.)

Returning a Unique Email Response

You can send a unique email response, however, it is often more productive and saves time to send a prepared response instead. (Refer to [“Sending a Prepared Email Response”](#) on page 90.)

- 1 Open the email message from your client, as you would normally.
- 2 Type a response and then click Send.

Transferring the Email Interaction to Another Agent or Workgroup

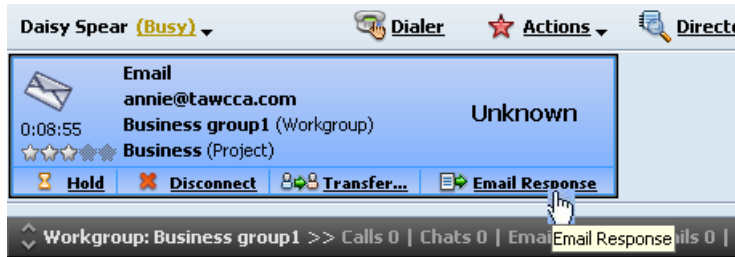
If you determine that another agent or workgroup might be better suited to handle a specific email inquiry, you can transfer it to another agent or workgroup, just as you would a phone call.

NOTE: After you transfer an email, IM prevents you from replying to the customer’s email.

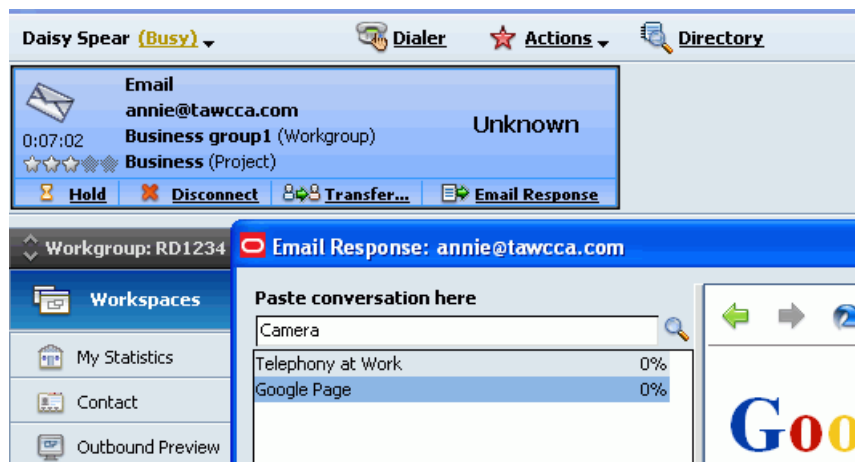
- 1 From the Interaction Control Bar, click the Transfer icon in the New Email window. The Transfer To window opens providing a User tab and a Workgroup tab.
- 2 Select a tab to transfer the call to another user or workgroup. A list of selections items.
- 3 Find and select a item from the list. (Refer to [“Finding Anyone \(Example Searches\)”](#) on page 43.)
- 4 Click the Transfer icon. The system transfers the email and the Interaction disappears from the Interaction Control Bar.

Sending a Prepared Email Response

- 1 From the Email Interaction window in the Interaction Control Bar, click the Email Response link.



The Email Response window opens providing a box for entering key words, which IM uses to find a corresponding match.



- 2 From the customer's email, copy and paste a question, a key word, or a key phrase into the *Paste conversation here* box.
- 3 Click the magnifying glass to begin searching for a match to an existing response.

IM attempts to match the highlighted text to predefined patterns stored in library templates created by your administrator. Each matching Intelligent Email Template appears with a confidence score (higher score indicates that the customer's email contained a greater number of Intelligent email template keywords).

NOTE: If there is no score, or a low score, you can scroll through the templates to determine which information is appropriate for your customer.

- 4 Click on a template to open it in your email client, where you can:
 - a Copy the displayed content of the Intelligent Email Template. Switch to your email application and paste the copied content into the body of your message.

or

- b** Click the Copy button (on the bottom of the Email Response box) to paste the entire email response text into the return email.
- 5** Click Send from your email client. IM disconnects the interaction after a return email registers with the Email Distributor.

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 the system sends to the customer, is also the project email address, not your personal email address.

Disconnecting an Email Interaction

If you decide that an email interaction does not require a response (because it is spam or a duplicate, for example), you can discard the email. When you discard an email interaction, IM removes it without sending a response to the customer. However, IM stores the content of the customer's email for later review by your administrator.

- 1** Make sure the email interaction that you want to discard is an Active Interaction.
- 2** From the Interaction Control Bar, click Disconnect in the Email Interaction window:
 - a** If your administrator does NOT require you to supply an outcome for each interaction, then:
 - IM displays a Discard Email confirmation message.
 - Click Yes to discard the email.
 - b** If your administrator requires you to supply an outcome for each interaction, then:
 - IM displays the Outcome dialog box.
 - Click an Outcome from the drop-down list and click Select.

11 Using Interaction History

This chapter describes contact interaction history records and shows you how to access and use this information. This chapter includes the following topics:

- [About Contact Interaction History Records](#)
- [Accessing Interaction History Information](#)
- [Using the Current Session History Tab](#)
- [Using the Contact Tab](#)
- [Using the Interaction History Tab](#)

About Contact Interaction History Records

IM tracks each step of a customer's interaction in a Contact History record. Knowing the details about all of the customer's previous interactions helps you respond with greater accuracy. Contact History information includes:

- The contact's name or UNKNOWN for unassigned interactions
- The interaction start and stop times
- Which agent received the interaction
- Voice recordings
- Notes
- Transcripts of the original email or chat, and the response (if the interaction was an email or chat)

Known Contacts vs. Unknown Contacts

Assigning a contact to each interaction makes it easier to access their complete interaction history. IM labels unassigned contacts as **UNKNOWN**, which means that they are not defined in the contact database or that they are not unique.

Accessing Interaction History Information

You can access Interaction history information three different ways:

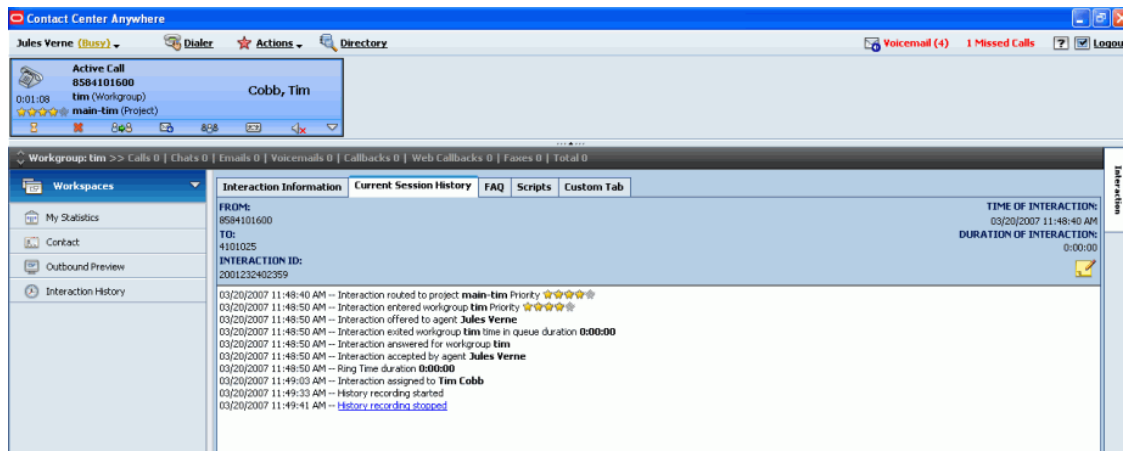
Using Interaction History ■ Using the Current Session History Tab

- 1 Use the Current Session History tab for an active interaction. (You can use a contact name or search interactions assigned as UNKNOWN.)
- 2 Select Contact from the Sidebar. (You must use a contact name.)
- 3 Select Interaction History from the Sidebar to find information about any inactive interaction. (You can use a contact name or search interactions IM assigned as UNKNOWN.)

Using the Current Session History Tab

When you accept a new interaction, IM automatically displays interaction information, if known, in your workspace in the Interaction Information tab. This tab displays general information about the customer (such as name, address, phone numbers, email address, and priority rating). If unknown, then unknown appears in place of the contact's name.

- 1 Select the Current Session History tab to view all steps the current interaction experienced before IM routed it to your workstation.



- 2 Click an underlined item to access additional information (such as a chat transcript, a email transcript, a voice recording, or a note).

For example, if you click on a transcript link, IM opens a new window displaying the contents of the transcript.

Interaction Information	Current Session History	Workitem
FROM: annie@tawcca.com TO: dproject2@tawcca.com INTERACTION ID: 50999454900915		
07-12-2006 02:01 PM -- Interaction routed to project Business 07-12-2006 02:01 PM -- Interaction entered workgroup Business 07-12-2006 02:01 PM -- Saving the transcript of the email 07-12-2006 02:01 PM -- Interaction offered to agent Daisy Sp 07-12-2006 02:01 PM -- Email template response offered to age 07-12-2006 02:01 PM -- Interaction exited workgroup Business 07-12-2006 02:01 PM -- Interaction answered for workgroup B 07-12-2006 02:01 PM -- Interaction accepted by agent Daisy S 07-12-2006 02:01 PM -- Ring Time duration 0:00:10		Camera From: annie <annie@tawcca.com> To: <dproject2@tawcca.com> Subject: Camera *This message was transferred with a trial version of Commu Please give me some information about this camera

If you click on a recording link, IM loads the object into the sound editor on your host (such as Windows Media, Real Player, and so on). Your sound editor automatically opens and plays the recording.

Using the Contact Tab

- 1 From the Sidebar, click Contact. The Contact tab opens in your workspace.

Workspaces	Contact	Contact History
My Statistics Contact Outbound Preview Workitem Interaction History	Template System Contact Annie Lee Identity Company Infor Gate First Name Annie Last Name Lee Title Address	

- 2 Click the Contact History tab.

Contact	Contact History		
	Project	Type	
		Date/Time ▲	
	nhup1	Workgroup Callback	21-11-2006 10:28 AM
	nhup1	Workgroup Web Callback	21-11-2006 10:39 AM
	nhup1	Workgroup Chat	21-11-2006 10:44 AM
	nhup1	Workgroup Chat	21-11-2006 10:54 AM
	nhup1	Workgroup Voicemail	21-11-2006 11:16 AM
	nhup1	Workgroup Voicemail	21-11-2006 11:42 AM
	nhup1	Workgroup Call	21-11-2006 11:44 AM

A list of Interaction histories associated with the contact appears. You can sort these by *Project*, *Type*, or *Date/Time* by clicking on the corresponding column label.

- 3 Double-click on an Interaction History from the list. It opens, showing more details.

Using the Interaction History Tab

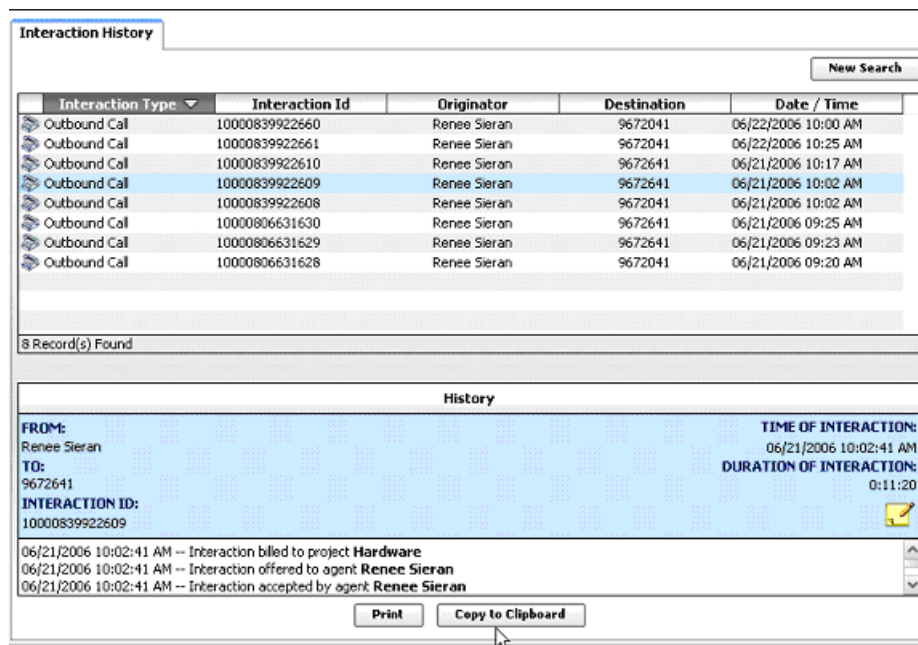
Use the Interaction History tab to research information about a Interaction that is not currently active.

- 1 From the Sidebar, click Interaction History. The Interaction History tab opens, where you can search for the Interaction History of an interaction that is not currently active.

- 2 Search for an interaction by entering or selecting one or more of these criteria from their respective menus or calendars:
 - Date range
 - Interaction Type
 - Project
 - Workgroup

- User
- Customer Phone Number
- Email address
- Fax Number
- Interaction ID

3 After entering search criteria, click Find. A list of all matching interactions appears.



4 Double-click the desired Interaction and its details appear in the window below the list.

5 To obtain a copy:

- Click Print, which opens your printer window.
- or

- Click Copy to Clipboard, which copies the information to your clipboard. Then, open a word processing program (such as MS Word or Note Pad) and paste.

6 To attach a note:

- a Click the Note icon. The Add Note window opens.
- b Type the contents of your note and click OK.

7 To start a new search, click the New Search button, which returns you to the Interaction History tab.

12 Managing Personal Voicemails and Missed Calls

This chapter describes how to manage personal voicemails and missed calls. This chapter includes the following topics:

- [Locating Personal Voicemails and Missed Calls](#)
- [Requirements Before Retrieving Personal Voicemail Messages](#)
- [Retrieving Personal Voicemail Messages](#)
- [Checking Missed Phone Calls](#)

Locating Personal Voicemails and Missed Calls

If someone calls you while you are away from your desk, IM displays the number of personal missed voicemails and missed calls in the right corner of the Toolbar (Figure 24).



Figure 24. Example Voicemail and Missed Calls Messages

Requirements Before Retrieving Personal Voicemail Messages

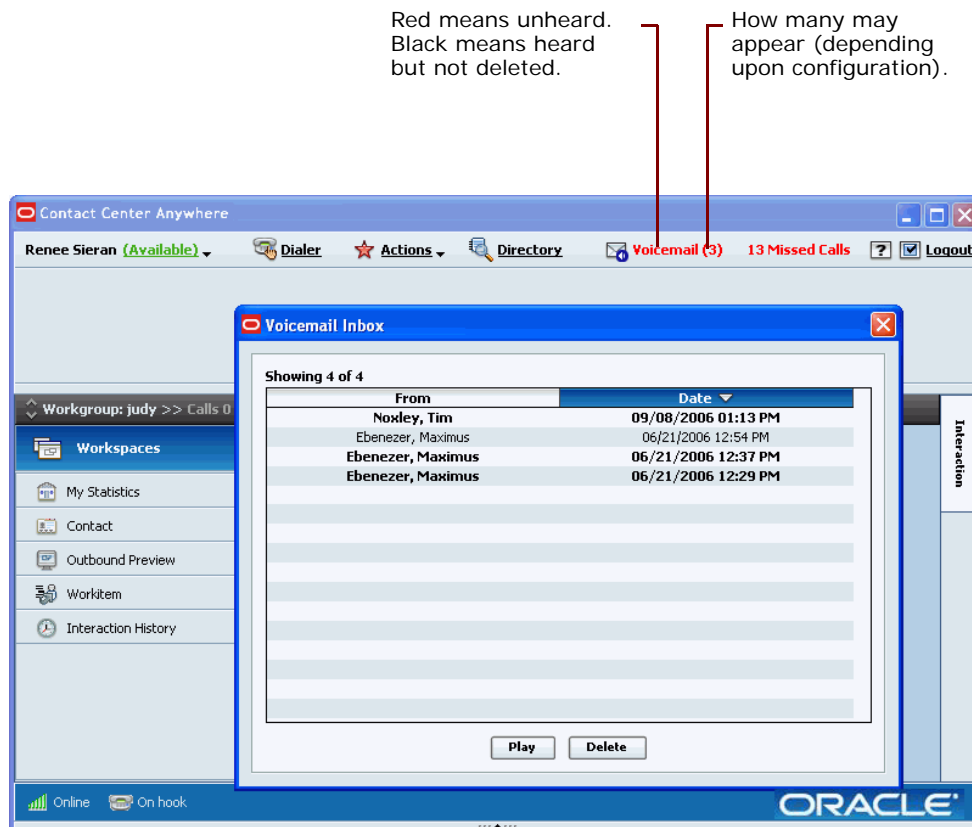
Before you can retrieve your voicemail messages:

- 1 You may need to configure your email client. (Refer to “[Identifying How to Be Notified \(for New Interactions\)](#)” on page 29.)
- 2 You may need to add audio software on your computer to hear 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 Personal Voicemail Messages

- 1 From the Toolbar, click the missed personal Voicemail link. The Voicemail Inbox opens showing a list of missed personal voicemail messages (including the name of the person who sent the voicemail and the date and time it arrived).

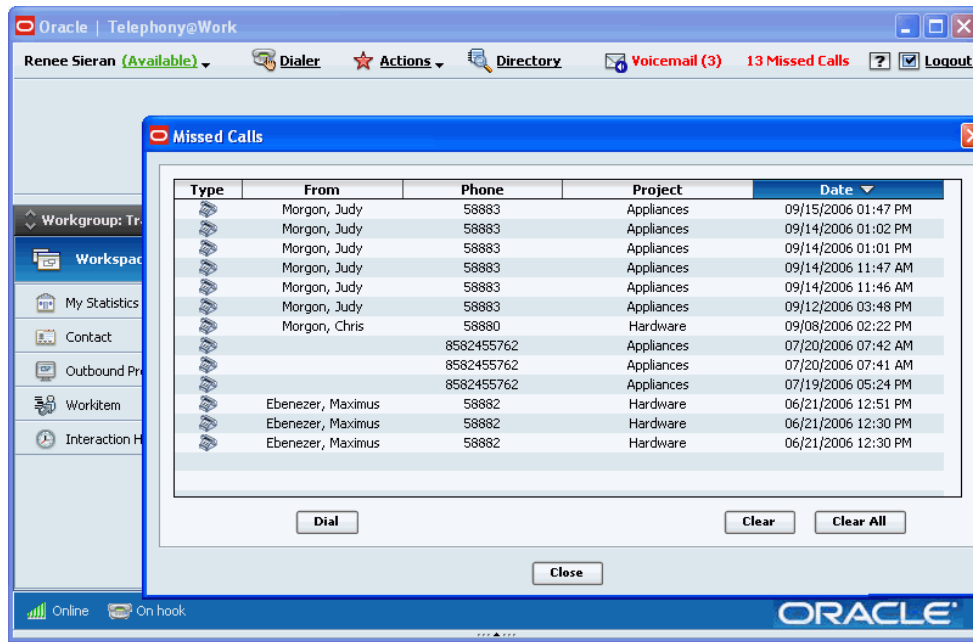


- If the word *Voicemail* appears in Red, that means you have not yet listened to your personal voicemails.
 - The word *Voicemail* changes to black after means you have listened to the voicemail but have not deleted it from your Inbox yet.
 - A number next to the voicemail link identifies how many personal voicemails may appear, depending upon your system configuration
- 2 Double-click a desired voicemail from the list. IM loads the voicemail into the media player on your workstation and begin playing

NOTE: It make take a few minutes for your media player to open.

Checking Missed Phone Calls

- 1 From the Toolbar, click the red Missed Calls link. The Missed Calls window opens, showing a list of messages along with the times they arrived.



NOTE: The missed calls message always appear in red. After you clear your missed calls, the message will fade from the top bar.

- 2 To return the call, double-click on the desired call from the list in the Missed Calls box. IM dials the number.
- 3 To clear a call, select the call from the list and click Clear. To clear more than one call, hold your mouse down as you click the calls to clear, and then click Clear. To clear all calls, simply click Clear All.

TIP: Click on a column heading to sort the list.

13 Managing Callback Requests

This chapter describes how to manage callback requests. This chapter includes the following topics:

- [About Callback Types](#)
- [Accepting ACD Callbacks](#)
- [Accepting Web Callbacks](#)

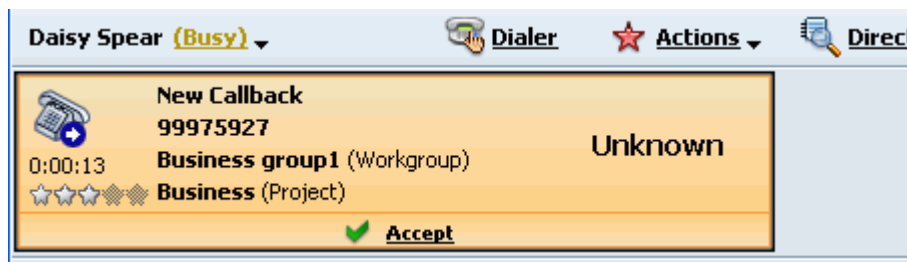
About Callback Types

There are three types of callback requests you may encounter:

- An ACD callback from a workgroup call
ACD Callback: An ACD Callback occurs when a caller chooses to leave a message rather than continue to wait in a queue for the next available Agent. When this happens, a New Callback Interaction window appears in the Interaction Control Bar.
- A Web callback
Web Callback: A Web Callback occurs when a customer requests to speak to an Agent while visiting a Web site. When this happens, a New Web Callback Interaction window appears in the Interaction Control Bar. The customer enters additional information not available over the phone.
- A scheduled callback from a previously set task
Scheduled Callback: From your Task area, you can schedule a date and time to return a phone call. When the system reaches the date and time you specified, IM calls the customer. When this happens, a Scheduled Callback Interaction window appears in the Interaction Control Bar.

Accepting ACD Callbacks

- 1 When you accept a callback, CCA rings your phone or notifies you and initiates the callback to the customer.
- 2 When an ACD Callback Interaction appears in the Interaction Control Bar, click Accept:



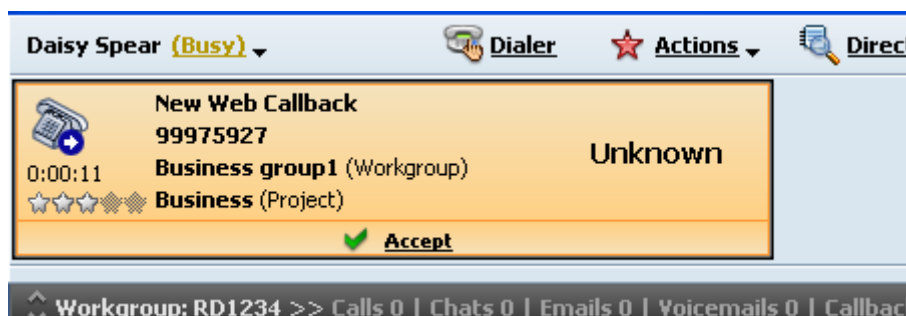
- a If you are working on-hook, your phone will ring. When you answer your phone, you will hear the outbound call message in progress. When the caller answers, begin speaking.
NOTE: An outbound call message is a prerecorded message customized for your contact center. For example, the message may welcome the caller or provide an estimated wait time.
 - b If you are working off-hook, as soon as you click Accept, IM connects you to the caller.
- 3 After you connect with the caller, the window changes to display Active Callback.



- 4 The Contacts information page also opens, providing information about the contact, if known. If the contact is unknown, create a new contact or find a matching contact from a list of possibilities. (Refer to [Chapter 17, “Managing Contacts”](#).)
- 5 Proceed as you would a standard phone interaction. (Refer to [Chapter 7, “Managing Phone Interactions”](#).)

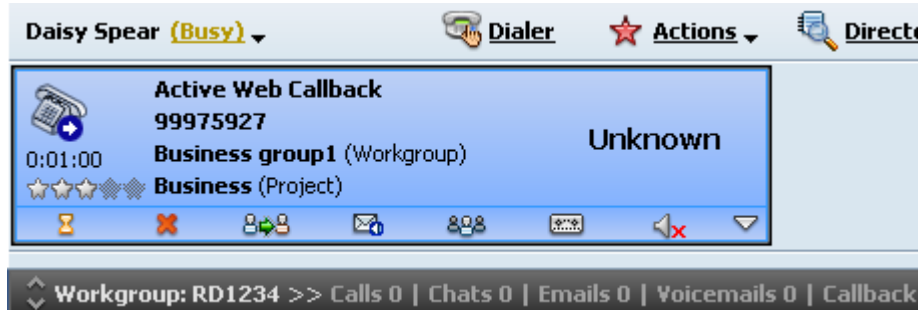
Accepting Web Callbacks

- 1 When a Web Callback Interaction appears in the Interaction Control Bar, click Accept:



- a If you are working on-hook, your phone will ring. When you answer your phone, you will hear the outbound call message in progress. When the caller answers, begin speaking.
- b If you are working off-hook, as soon as you click Accept, IM connects you to the caller.

- 2 After you connect with the caller, the window changes to display Active Web Callback.



- 3 The Contacts information page also opens, providing information about the contact, if known. If the contact is unknown, create a new contact or find a matching contact from a list of possibilities. (Refer to Managing Contacts.)
- 4 Proceed as you would a standard phone interaction. (Refer to Managing Phone Interactions.)

14 Managing Predictive Interactions

This chapter describes how to manage interactions from Predictive Calling Projects. This chapter includes the following topics:

- [Making Predictive Calls](#)
- [Logging in to a Predictive Project](#)
- [Using the Do Not Call List](#)
- [Logging Out of a Predictive Project](#)

Making Predictive Calls

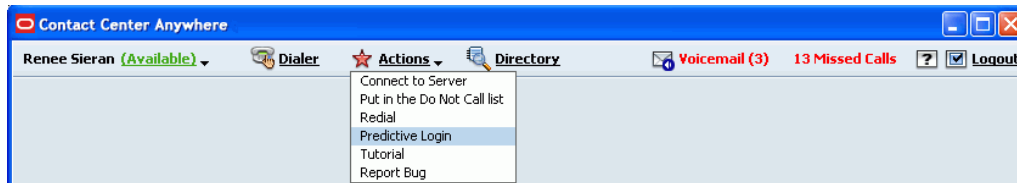
NOTE: Predictive Calling is an optional feature of CCA and is only available if configured on your system.

In Predictive Calling, like Preview 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 dials a series of phone numbers. The system can detect when a person or answering machine answers the call, a busy condition exists, or that the number is a non-working number, and handles the calls as configured. For example, the system detects an answer by a person, the system routes the customer to an available agent. If a busy is detected, the system will re-dial that call later. Predictive calling is used for high-volume outbound contact centers where automation of non-answered call attempts significantly improves the productivity of the contact center.
- In **Preview Calling**, the agent selects a project and tells the system to dial a customer number, and then waits for the customer to answer.

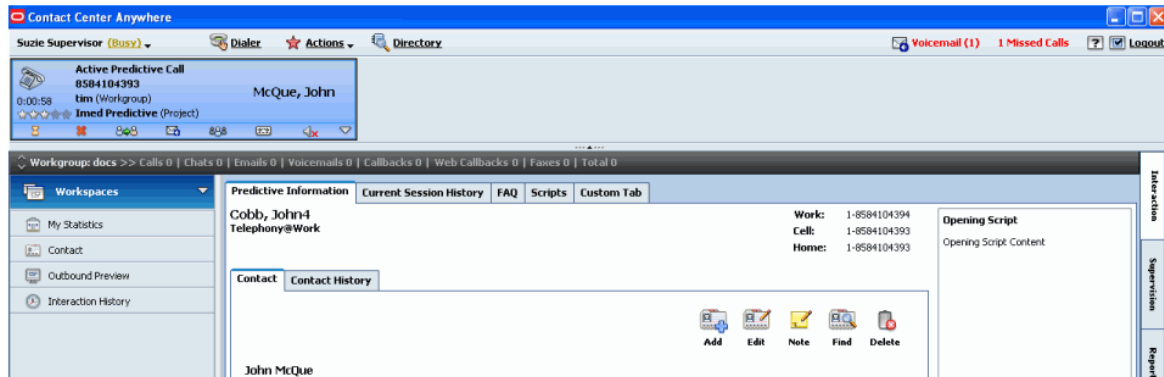
Logging in to a Predictive Project

- 1 If you are assigned to Predictive Project, log into the project by selecting Predictive Login from the Actions link.



Now, after selecting Predictive Login, CCA knows you are available to receive Predictive calls from one or more projects.

IM offers you a New Predictive Call in the Interaction Control Bar. IM also populates your workspace with the contact's information, including the contact's name, phone number, and company name (if known).



- 2 If you are working *on-hook*, your phone will ring. Answer your phone and speak to the contact.
or
If you are working *off-hook*, you will hear a beep when IM delivers the call to you.
- 3 Proceed as you would a standard phone interaction. (Refer to ["Managing Phone Interactions"](#) on page 51.)

- 4 When finished, an Outcome box appears and you must select an outcome for the call.

- a From the Result drop-down, select a result (such as Answered, Answering Machine, Busy, Fax, No Answer, Invalid Number, and so on).
- b From the Action drop-down, select an action (such as None, Callback, Personal Callback, and so on).
 - NOTE:** If you select Add to Do Not Call List, refer to [“Using the Do Not Call List”](#) on page 110.
 - Depending upon which action you select, you may see additional fields. For example, if you select Callback, additional fields appear for identifying the time and date when to return the call. IM will automatically remind you about the callback at the time and day you enter.
- c From the Outcome drop-down, select an outcome for this call.

NOTE: The system administrator defines the possible outcomes.

Selecting Outcomes

The Outcomes feature is optional and may not be available at your company.

Outcomes and Actions

Table 6 lists possible outcome results for Preview Interactions.

Table 6. Outcome Results Options

Result	Meaning
Answered	The customer answered the phone. Choosing this result removes the number from the Preview Calling List so that CCA will not provide it to Agents to call again.
Answering Machine	An answering machine picked up the call.
Busy	The customer's phone line is busy.
Fax	The number went to a Fax machine. Choosing this result remove the number from the Calling List so that CCA will not provide it to agents to call again.
Invalid Entry	The number is not a valid phone number. Choosing this result remove the number from the Calling List so that CCA will not provide it to agents to call again.
No Answer	The customer's phone rang but no one picked it up and neither did an answering machine. Choosing this result keeps the number ON the Calling List.

Table 7 lists possible actions you can select for each outcome.

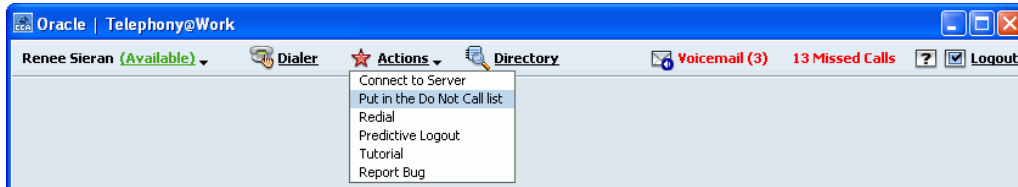
Table 7. Outcome Action Options

Action	Meaning
Add to Do Not Call List	Choosing this result removes the number from the Calling List so that CCA will not provide it to Agents to call again. (Refer to "Using the Do Not Call List" on page 110.)
Callback	This will allow the scheduling of a callback at a specific day and time. NOTE: CCA calls every number in the current Dialer List before calling the Callback number.
None	No further action is required.

Using the Do Not Call List

If a person on the Predictive calling lists requests to be put on the **DO NOT CALL LIST**, then:

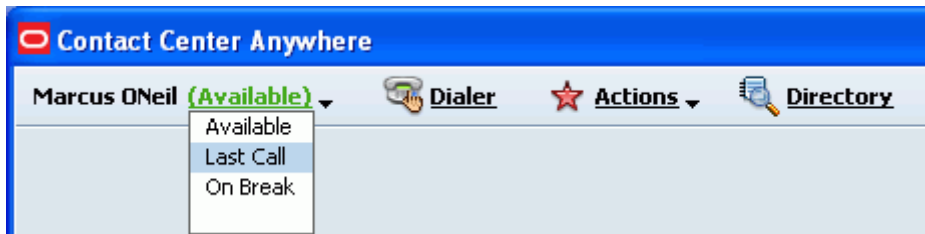
From the Actions link, select Put in Do not Call list.



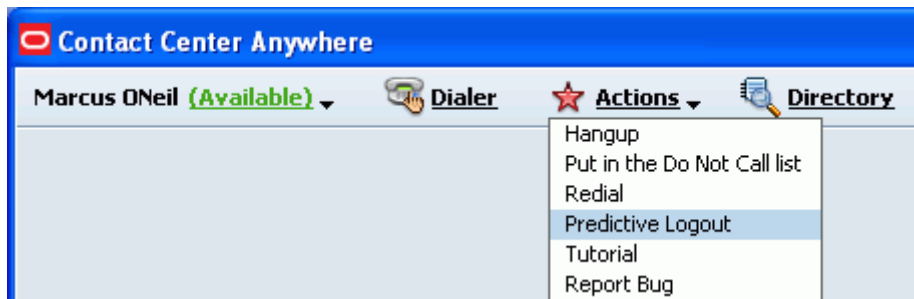
Logging Out of a Predictive Project

When you are finished working in a Predictive Project:

- 1 From the Status drop-down list, select Last Call.



- 2 From the Actions drop-down list, select Predictive Logout.



15 Managing Preview Interactions

This chapter describes how to manage interactions from Preview Calling project. This chapter includes the following topics:

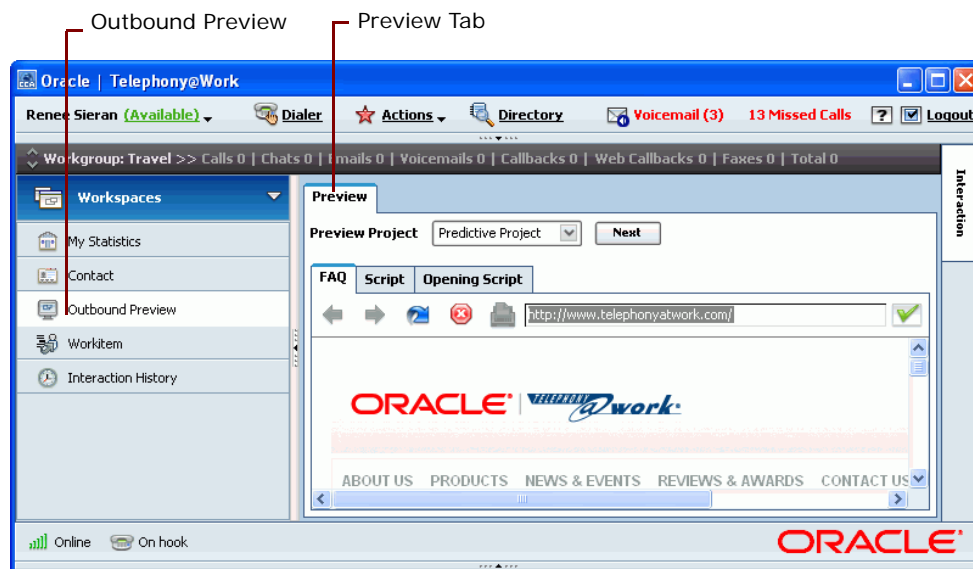
- Making Preview Calls
- Selecting Outcomes
 - Outcomes and Actions
- Reading and Loading Scripts

Making Preview Calls

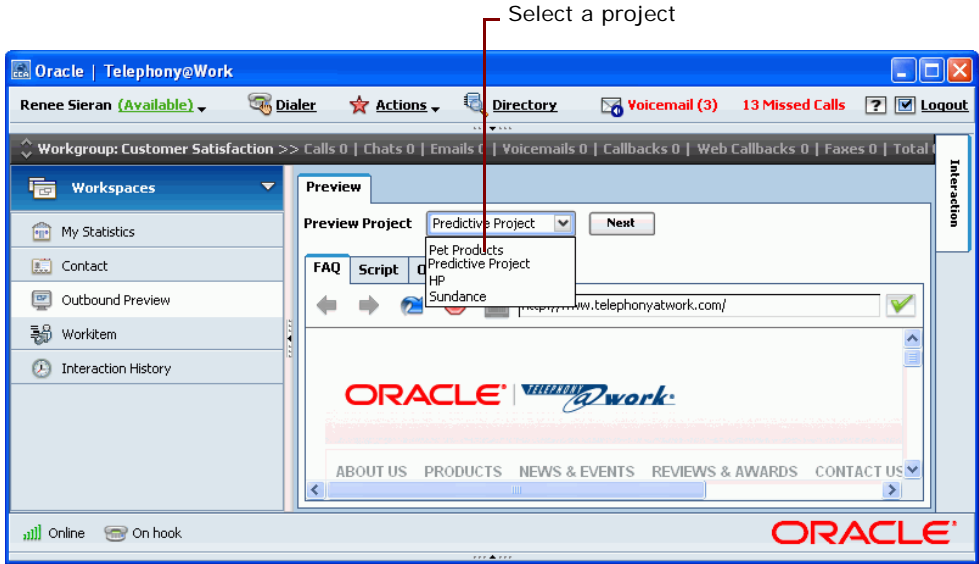
When your contact center conducts a Preview Calling project, the system places calls to prospective customers. When a prospective customer answers the call, the system routes the call to the next available agent.

In **Preview Calling**, the agent selects a project and tells the system to dial a customer number, and then waits for the customer to answer.

- 1 From the Sidebar, click Outbound Preview and the Preview tab opens in your workspace.

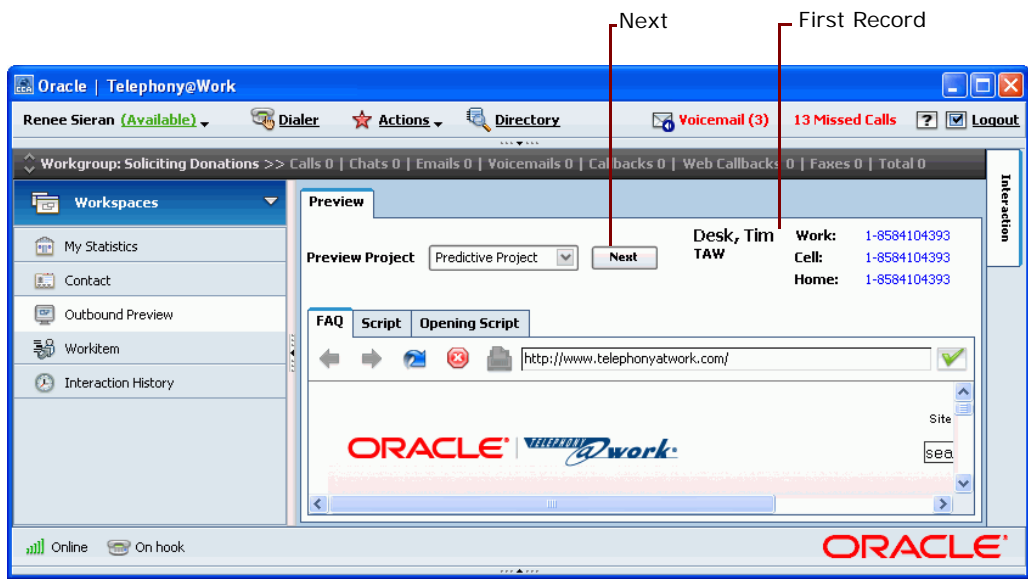


- 2 From the Preview Project drop-down list, select a project.



- 3 Click the Next button to view the first record.

NOTE: If you prefer not to call this person, click Next again to view the next record.



- 4 IM presents phone numbers as links. Click the phone number you would like to try first. IM dials the number.

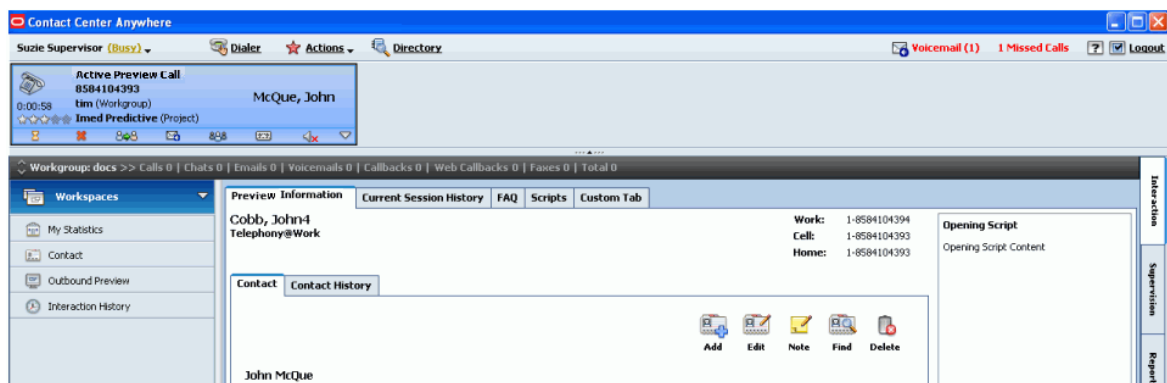
NOTE: You can also select the Script, FAQ, and Opening Script tabs, as desired, to view information about the Preview Project.

TIP: Refer to “Reading and Loading Scripts” on page 117.

- 5 If you are working *on-hook*, your phone will ring. Answer your phone and speak to the contact. or

If you are working *off-hook*, you will hear a beep as IM connects you to the contact.

- 6 If you connect, the Active Preview Call appears in the Interaction Control Bar and the customer’s name, phone number, and company name (if known) appears in your workspace.



NOTE: Once IM calls a list entry, you cannot use the same entry again.

Proceed as you would a standard Phone Interaction and, when finished, select an outcome and wrap-up the call.

- 7 If you do not make a connection, select another number and try again.

Selecting Outcomes

The Outcomes feature is optional and may not be available at your company.

Outcomes and Actions

Table 8 lists possible outcome results for Preview Interactions.

Table 8. Outcome Results Options

Result	Meaning
Answered	The customer answered the phone. Choosing this result removes the number from the Preview Calling List so that CCA will not provide it to Agents to call again.
Answering Machine	An answering machine picked up the call.
Busy	The customer's phone line is busy.
Fax	The number went to a Fax machine. Choosing this result remove the number from the Calling List so that CCA will not provide it to agents to call again.
Invalid Entry	The number is not a valid phone number. Choosing this result remove the number from the Calling List so that CCA will not provide it to agents to call again.
No Answer	The customer's phone rang but no one picked it up and neither did an answering machine. Choosing this result keeps the number ON the Calling List.

Table 9 lists possible actions you can select for each outcome.

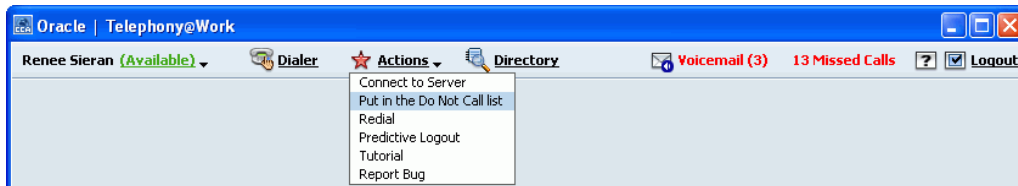
Table 9. Outcome Action Options

Action	Meaning
Add to Do Not Call List	Choosing this result removes the number from the Calling List so that CCA will not provide it to Agents to call again. (Refer to "Using the Do Not Call List" on page 116.)
Callback	This will allow the scheduling of a callback at a specific day and time. NOTE: CCA calls every number in the current Dialer List before calling the Callback number.
None	No further action is required.

Using the Do Not Call List

If a person on the Predictive calling lists requests to be put on the **DO NOT CALL LIST**, then:

From the Actions link, select Put in Do not Call list.



Reading and Loading Scripts

Your company's administrator can create company-approved responses to common questions a contact may have. Your company may also provide different scripts for various projects.

- 1 From the Side Bar, click Outbound Preview. The Preview tab opens, showing three additional tabs: FAQ, Script, and Opening Script.
 - **FAQ:** Frequently Asked Questions shows a list of common questions and approved responses you can provide to contacts.
 - **Script:** Written words and logic to follow when handling a contact. A script assists you in maintain focus on the content of the Interaction.
 - **Opening Script:** A well-written paragraph that is design to grab a contact's attention and interest in continuing with the Interaction.
- 2 From the Preview Project drop-down list, select the desired project. IM loads the FAQs, script, and opening script for the project you selected.
- 3 Click the Opening Script tab and read the information that appears in your workspace.
- 4 Click the Script tab to view one for more links related to the project. Click the check mark to open a link to a page or Web site created for the project.
- 5 To help you answer the contact's questions, click the FAQ tab to open common questions and approved responses.
- 6 Use the FAQ and Script action icons to move back, forward, refresh the page, stop loading a link, and to print the page.
- 7 When you finish your current interaction, click Next to tell IM to call the next contact.

16 Managing Multiple Interactions

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

- [Setting Your Status](#)
- [Accepting Multiple Interactions](#)

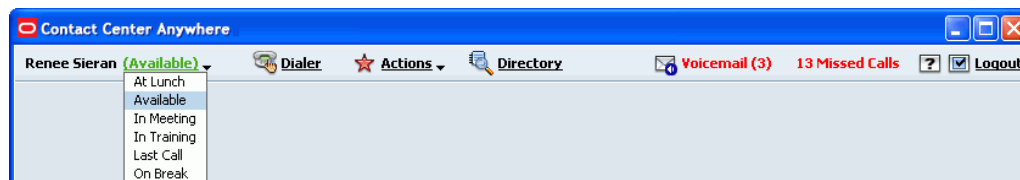
Setting Your Status

Most of the time, you will probably handle only one phone 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 IM will offer you a new interaction.

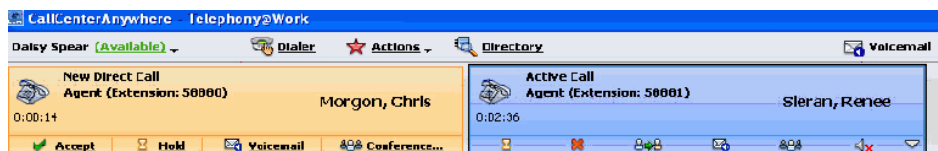
- 1 For example, when IM offers you an email, accept as normal. (Refer to [“Accepting an Email Interaction” on page 87.](#))

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

- 2 To make yourself available to accept a phone interaction, select Available from the status drop-down list.



When your status is **Available**, IM will present the new interaction in the Interaction Control Bar. The following shows the windows for two interactions: an Active Call and a New Direct Call.

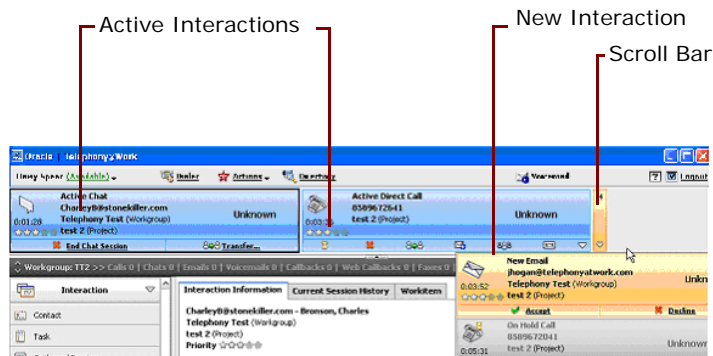


Accepting Multiple Interactions

- 1 When IM offers you an interaction (such as an email), accept it by clicking the Accept link and then place the interaction on Hold.

- 2 To make yourself available to accept a new interaction (such as a phone call), select Available from the Status drop-down list.

With your status now Available, IM presents the new interaction in the Interaction Control Bar.



Each time you accept an interaction and change your status to available, IM will continue to present new interactions.

After accepting two interactions, IM displays a scroll bar showing the total number of interactions you are currently handling. Click the down arrow to open a window for the interaction you select.

NOTE: You cannot have two active phone interactions unless they are in conference. However, you can place the first phone interaction on hold and then accept a new interaction.

17 Managing Contacts

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

- [About Contacts](#)
- [Features of the Contact Screen](#)
- [Finding Contact Records](#)
- [Communicating with a Contact](#)
- [Creating a New Contact Record](#)
- [Editing a Contact Record](#)
- [Deleting a Contact Record](#)
- [Viewing a Contact](#)
- [About Assigning Contacts](#)
- [About How Contacts Are Assigned](#)
- [Viewing Contact History](#)
- [Listening to a Recorded Interaction](#)
- [Adding Notes](#)

About Contacts

A contact can be anyone who has ever reached your contact center. Usually they are your customers but contacts can also be prospects, vendors, and partners.

Use the Contact tab from IM's Sidebar to create contact records, update contact record, or find history information for a specific contact. Contact records contain information about the contact, such as the contact's name, address, phone number, email address, and notes.

When you accept an interaction from a contact, you can assign (or link) the contact to a contact record so that all of the information that was previously recorded about that customer displays in your workspace. This background information provides some familiarity with the contact and their previous activity or issues. Saved information includes all the times the customer reached the contact center, how CCA routed them through the system, and who they spoke with or emailed.

Features of the Contact Screen

The Contact screen provides two tabs: the **Contact** tab (see ["About the Contact Tab"](#)) and the **Contact History** tab (see ["About the Contact History Tab"](#) on page 123).

About the Contact Tab

The Contact tab (Figure 25) shows 17 primary information fields, which are normally defined by your administrator.

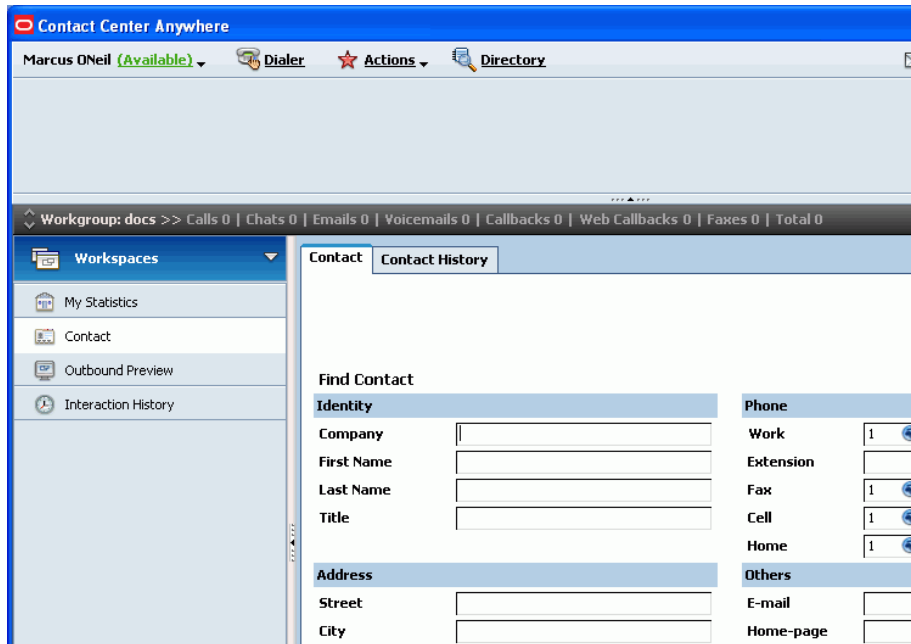


Figure 25. Contact Tab

When you click the Find button, all of these fields become searchable.

The Template drop-down list provides pre-defined contact templates, usually created for specific projects at the time they are configured.

Use the buttons to:

- Add a New Contact
- Edit an Existing Contact
- Add a Note to a Contact Record
- Find an Existing Contact
- Delete a Contact

About the Contact History Tab

The Contact History tab (Figure 26) shows a list of all interactions between a specific contact and your company. The list includes the date and time when the interaction was made or received, the project, the type of interaction (such as Predictive Call, Outbound Call, Workgroup Call, and so on), and the duration of the interaction.

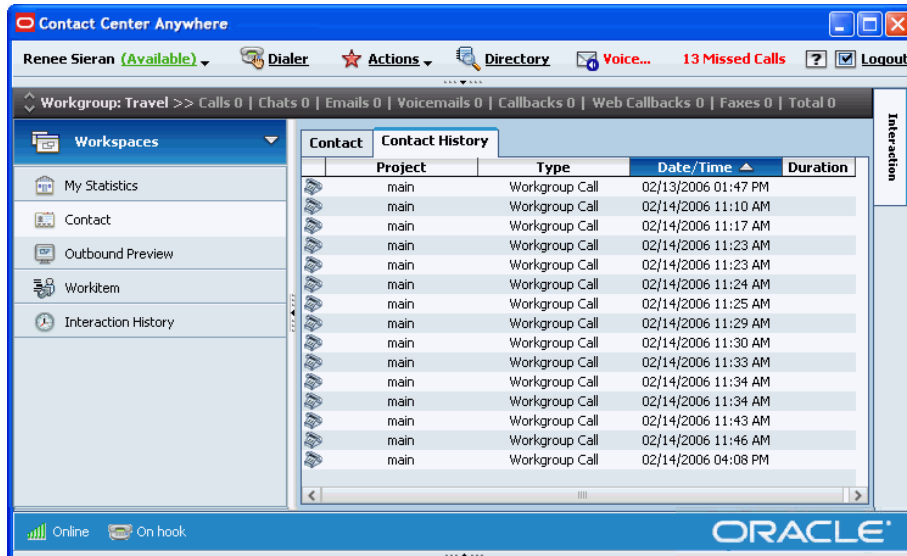


Figure 26. Contact History Tab

In addition, if you double-click an interaction in the Contact History List, the Interaction History window (Figure 27) opens to show all events that occurred during that Interaction (such as routing information, the accepting agent's name, transfers, outcomes, notes, and recordings).

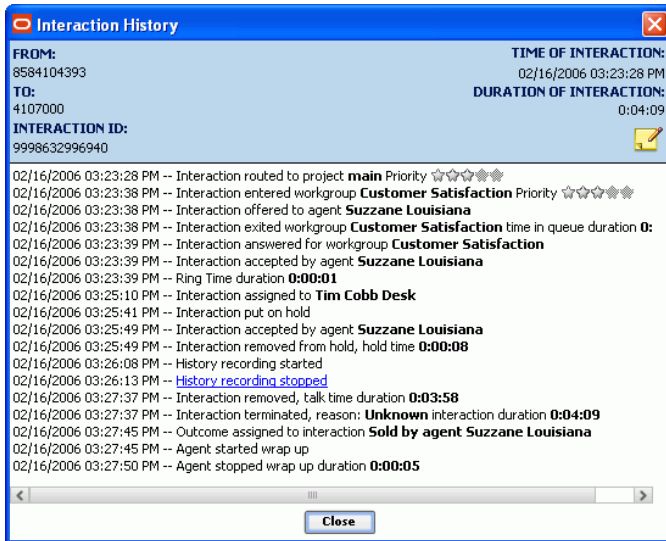
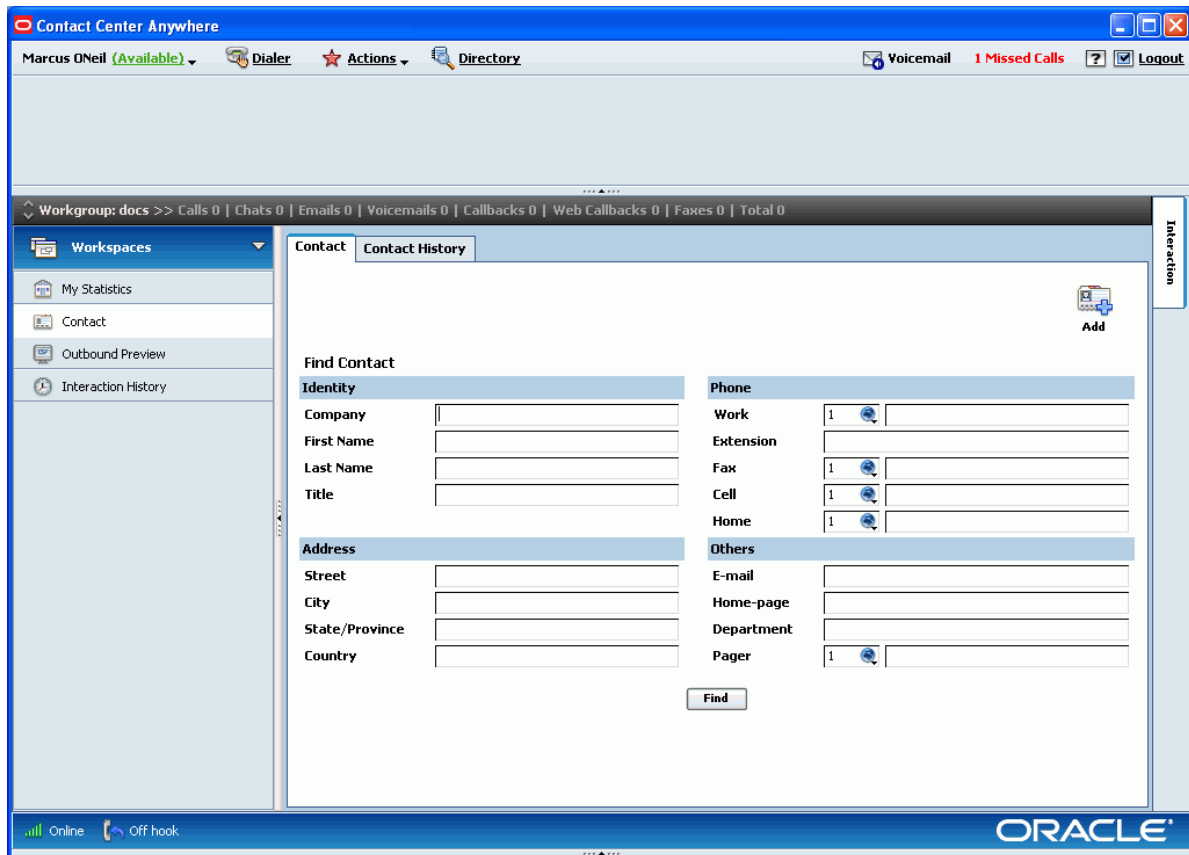


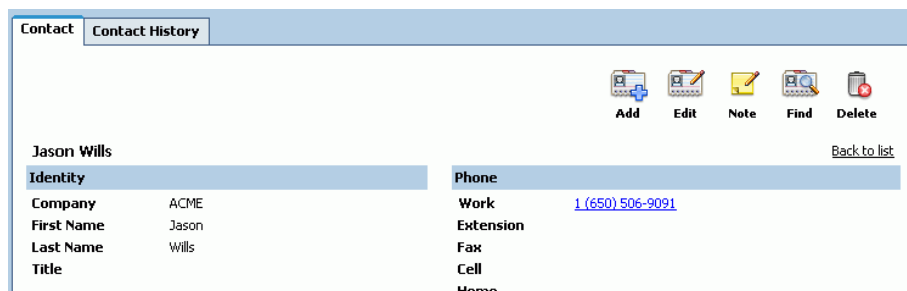
Figure 27. Example Interaction History for a Specific Interaction

Finding Contact Records

- 1 From the Sidebar, click Contact. Since IM opens the last Contact screen you access, you may not see the Find button as shown:



If your screen opens to a completed screen (as in the next example), click the find icon (located in the upper right corner of the screen).



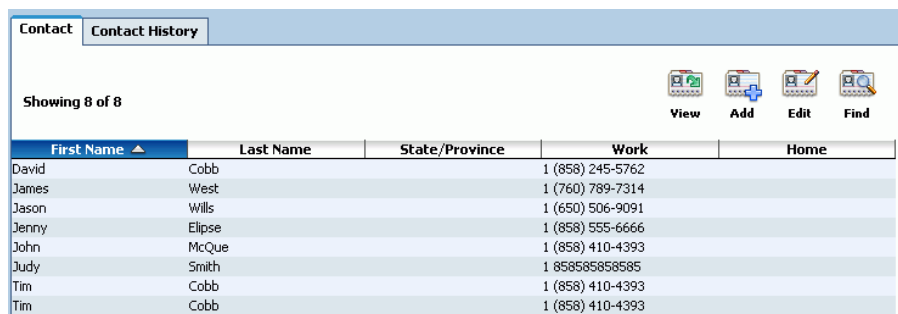
NOTE: Because the Contact screen can be customized by an administrator, your screen may look different from the example.

- 2 After opening the Contact Find screen, type any relevant information related to the contact into one or more fields. The more information you enter, provides a smaller list of matching results.

TIP: You can also type an asterisk (*) into a field to return ALL contacts for that field. If there are too many matches, a message appears requesting additional search criteria to reduce the possible matches.

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

- 3 Click Find. A list of all contacts in the database that match the fields you completed appears in your workspace. The following shows an example list of results.



Showing 8 of 8

View Add Edit Find

First Name ▲	Last Name	State/Province	Work	Home
David	Cobb		1 (858) 245-5762	
James	West		1 (760) 789-7314	
Jason	Wills		1 (650) 506-9091	
Jenny	Elipse		1 (858) 555-6666	
John	McQue		1 (858) 410-4393	
Judy	Smith		1 858585858585	
Tim	Cobb		1 (858) 410-4393	
Tim	Cobb		1 (858) 410-4393	

- If desired, sort by clicking a column heading. Click the same column heading again to reverse the sort order (from ascending to descending and visa versa). To multi-sort, press and hold the Ctrl key while you click another column.

For example, to sort first by Last Name, click the Last Name column heading. Then, to sort by State while still keeping the last names in order, press and hold the Ctrl key while clicking the State/Province column.

- 4 Double-click on the desired contact from the list. The Contact page opens to show all known information about the contact.

Communicating with a Contact

The contact record provides the contact's telephone number, fax number, email address, and other contact information. Once you find the contact record, you can communicate with the contact by simply clicking on one of the underlined information fields.

- 1 Find the desired Contact. (Refer to ["Finding Contact Records"](#) on page 125.)

- From the contact results list, double-click on the desired contact. The Contact page opens to show all known information about the contact.



- Click any underlined telephone number, fax number, or email address (Table 10). IM makes the call, opens the fax dialog box, or opens your Email Client:
 - Refer to “Managing Phone Interactions” on page 51.
 - Refer to “Managing Email Interactions” on page 87.

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	IM dials the contact’s work phone number.
Fax	Select a fax number, a project for billing the interaction, and then IM dials the contact’s fax number.
Cell	IM dials the contact’s cellular number.
Home	IM dials the contact’s home phone number.
Email	<p>If you have told IM about the mail program that you use (Configure > General > Current Email Client), IM opens a new email message and places the customer’s email address in the “To:” field.</p> <p>The return address on the email is the address you configured as your return address in your email client program (not your IM email address).</p>
Home Page	IM launches a Web browser and opens the Web page identified in the hyperlink.

Creating a New Contact Record

IM stores interaction information about all contacts. It is important, however, to add as much contact information about a contact so that you can find the record later. You can create a New Contact Record at any time, even when you make or receive a call, if you have user privileges.

- 1 If you are currently managing a active interaction, Contact Information automatically appears in your workspace, if known. You can update this information or create a new contact.

To create a new contact, click Contact from the Sidebar to open the Add Contact screen in your workspace.

The screenshot shows the 'Add Contact' form with the following fields:

- Identity:** Company*, First Name*, Last Name*, Title
- Address:** Street, City, State/Province, Country
- Phone:** Work, Extension, Fax, Cell, Home (each with a dropdown and globe icon)
- Others:** E-mail, Home-page, Department, Pager (with a dropdown and globe icon)

Buttons: Cancel, Ok. Top right: View, Find, Back to list.

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

- 2 Type information you gather from the customer into the appropriate fields.

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

- 3 Click OK to save your changes (or Cancel to close without saving any changes).

About the Contact Interaction Information Tab

Whenever you make or receive a call, chat, or email, the Contact Interaction Information tab appears in your workspace.

- 1 If the contact is in the database and there are no duplicate records, their Contact Record appears. Verify the contact's information and make changes, if necessary. (Refer to ["Editing a Contact Record"](#) on page 130.)

NOTE: If a duplicate record exists, IM presents a list of possible records so that you can select the correct one, if it is on the list.

 - a If there is nothing in the contact record, then first verify whether this contact already exists. Do this by typing the caller's name or company into the First Name, Last Name, and Company fields and then clicking the Find button.

NOTE: You can use an asterisk (*) as a wildcard.
 - b Second, if the contact is NOT in the database, then click the Add button. A blank Add Contact page appears.
 - c Type all relevant information into the fields.
- 2 Click OK. The Interaction Information tab refreshes to show the information you entered.

NOTE: If the interaction disconnects before you saved the information, an Unsaved Contact Info message appears, allowing you to complete entering information and save it before the workstation closes.
- 3 Click Yes to save the record.
- 4 If you are still on the call, you can assign the interaction to this contact by following the instructions under ["Manually Assigning a Contact to the Current Interaction"](#) on page 132.

Using the Current Session History Tab

The Current Session History tab shows all steps associated with the current interaction. (Refer to [“Using the Current Session History Tab” on page 94.](#))

Using the *Optional Custom Tab*

The *Custom* tab is an optional feature of CCA. This tab enables your administrator to integrate CCA with other applications specific to your business (such as CRM or Help Desk). In addition, your administrator can give this tab a unique label to identify its function. Thus, you may see something different than shown in the illustration.

Depending upon how your administrator designs this tab’s function, a Web page or a script may open each time you receive an interaction, when you accept an interaction, when an interaction becomes *active*, or each time you complete an interaction.

TIP: If you see a unique tab in your Contact Interaction Information area, contact your supervisor or administrator for specific information.

Editing a Contact Record

If you have privileges, you can make updates to contact information.

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

- 1 From the Sidebar, click Contact. The Contact tab opens in your workspace or from the workstation of the current interaction.
- 2 Find the contact record to edit. (Refer to [“Finding Contact Records” on page 125.](#))
- 3 From the search results list, double-click the contact to edit.

- 4 Click the Edit button. The Edit Contact screen opens.

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

- 5 Modify the data in any of the fields.
- 6 When you are done, click OK to save your changes (or Cancel to discard any changes).

Deleting a Contact Record

You can only delete contact records if you have privileges to do so.

- 1 From the Sidebar, click Contact. The Contact tab opens in your workspace.
- 2 Find the contact record to delete. (Refer to “Finding Contact Records” on page 125.)
- 3 From the search results list, double-click the contact to delete. The contact information appears.
- 4 Click the Delete button. A confirmation message appears.
- 5 Click OK.

Viewing a Contact

- 1 Use the techniques beginning with “Finding Contact Records” on page 125 to find one or more contacts.
- 2 To view the information for one of the Contacts from the search results list:

- 3 Double-click the desired contact.

or

Select the contact and click the View button.

About Assigning Contacts

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 links the email or phone number of the current customer (the current interaction) to an email or phone number in a contact record, then it is assigned to the current interaction.

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

- 1 You will see the customer's name appear prominently in the Interaction Control Bar. If a Contact is not assigned to the current interaction, *Unknown* appears instead of the name.
- 2 The most important event that happens after assigning a contact record to the current interaction is that, when the interaction ends, IM automatically appends a new interaction record to the customer's contact history.

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.

You cannot retrieve the history from the contact. But you can find it using the Interaction History.

About How Contacts Are 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 unique match is made, IM automatically assigns the contact record to the current interaction. If multiple records exist, a list of possible matches appears. Select the one that matches, if applicable.
- **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.

Manually Assigning a Contact to the Current Interaction

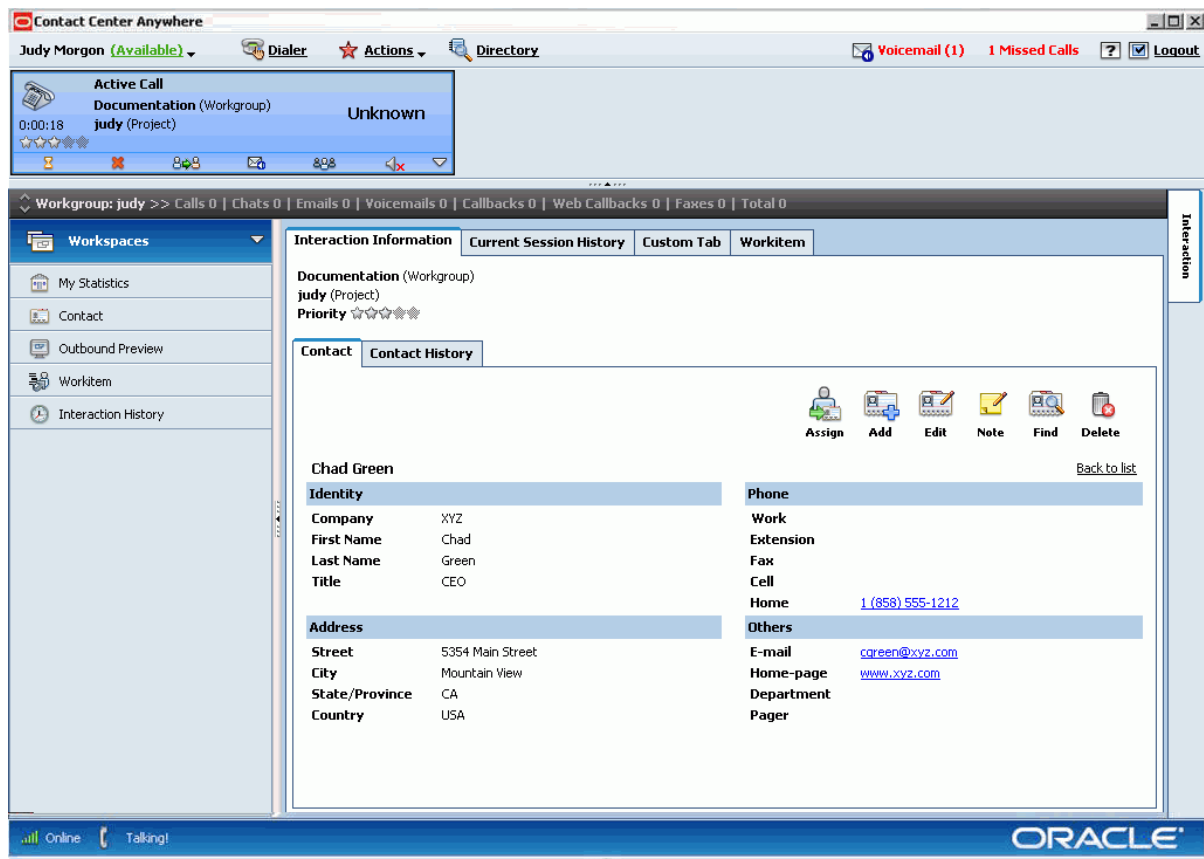
Callers may not dial in from the same telephone number as they did previously. In this case, CCA cannot automatically retrieve their past information. You must, therefore, find the contact's information manually and then assign the contact to the interaction so that the information is recorded.

- 1 Accept the interaction.
- 2 Find the contact record or create a new contact record if it does not exist. (Refer to “Finding Contact Records” on page 125 and “Creating a New Contact Record” on page 128.)

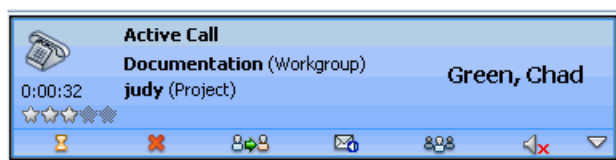
NOTE: The phone number and email of the contact that you create **MUST MATCH** the phone number and email for the current interaction!

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 After you create or find the contact record, click View to open the contact record details. (Refer to “Viewing a Contact” on page 131.)



- 4 Click the Assign icon. After IM successfully assigns the contact to the current interaction, the customer’s first name and last name appears in the Active Call window.



Viewing Contact History

Each time a customer reaches a 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.

Viewing Contact History for Current Interaction

If you are currently handling an interaction, you can view the details of what has happened to the customer from when they first reached the contact center to when you accepted the interaction.

- 1 From the Sidebar, click Interaction History. The Interaction History tab opens in your workspace.

Interaction Information	Current Session History	FAQ	Scripts	Workitem
FROM: TO: 22113 INTERACTION ID: 1999454895320		TIME OF INTERACTION: 2006-12-07 11:30 AM DURATION OF INTERACTION: 0:00:00		
2006-12-07 11:30 AM -- Interaction routed to project P1 Priority ☆☆☆☆☆ 2006-12-07 11:30 AM -- Interaction entered workgroup W1 Priority ☆☆☆☆☆ 2006-12-07 11:30 AM -- Interaction offered to agent 1 1 2006-12-07 11:30 AM -- Interaction exited workgroup W1 time in queue duration 0:00:00 2006-12-07 11:30 AM -- Interaction answered for workgroup W1 2006-12-07 11:30 AM -- Interaction accepted by agent 1 1 2006-12-07 11:30 AM -- Ring Time duration 0:00:02				

- If the current interaction was assigned to a contact, when the interaction ends, IM permanently saves the Interaction History and appends it to the contact. This process creates a valuable history that is specific to the customer and can be retrieved later. (Refer to [“About Assigning Contacts”](#) on page 132.)
- If the current Interaction was not assigned to a contact, the information is still recorded in history. You can retrieve this information by project or workgroup, or by interaction ID.

The 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).

Example:

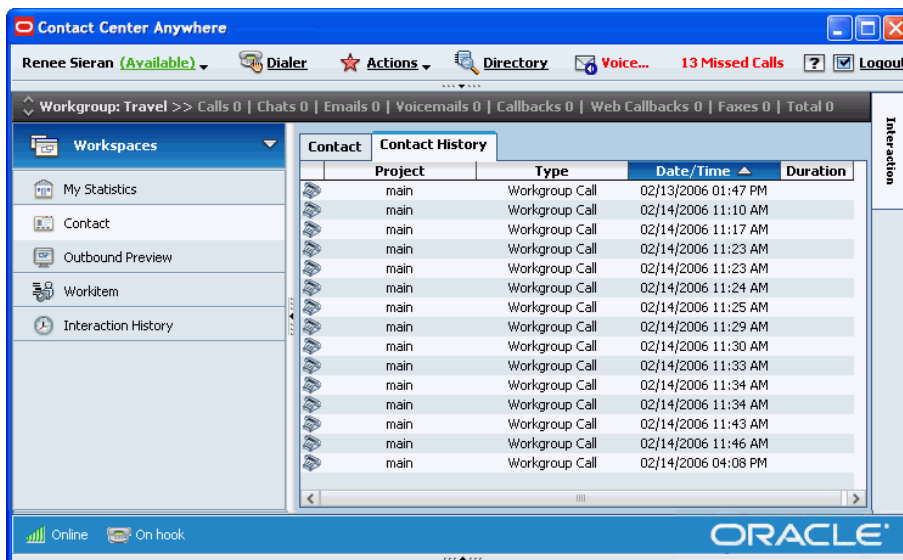
A new customer reaches your contact center (by email, phone, or other means) and you accept the interaction. The customer has never contacted your contact center before, so you create a new contact record for them (refer to [“Creating a New Contact Record” on page 128](#)) and manually assign the contact to the current interaction (refer to [“Manually Assigning a Contact to the Current Interaction” on page 132](#)).

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.

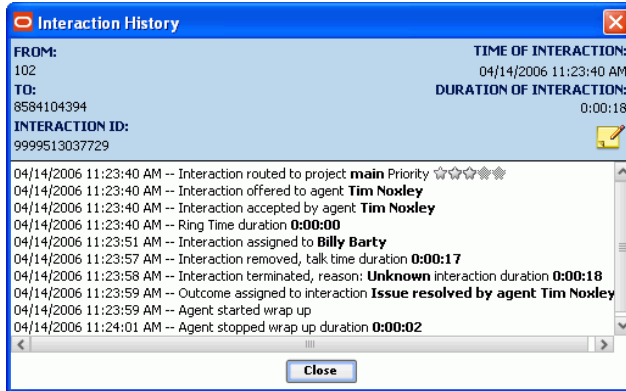
A few days later, the same customer reaches the contact center. This time, since IM already has a contact record for the customer (with their email address and phone number), the system auto-assigns the contact record to the customer. Now, when you end the interaction, the system saves the interaction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

Viewing a Contact’s History (Interaction Records)

- 1 Find the contact. (Refer to [“Finding Contact Records” on page 125](#).)
- 2 Click the Contact History tab. The History tab displays all of the Contact’s Interaction Records.



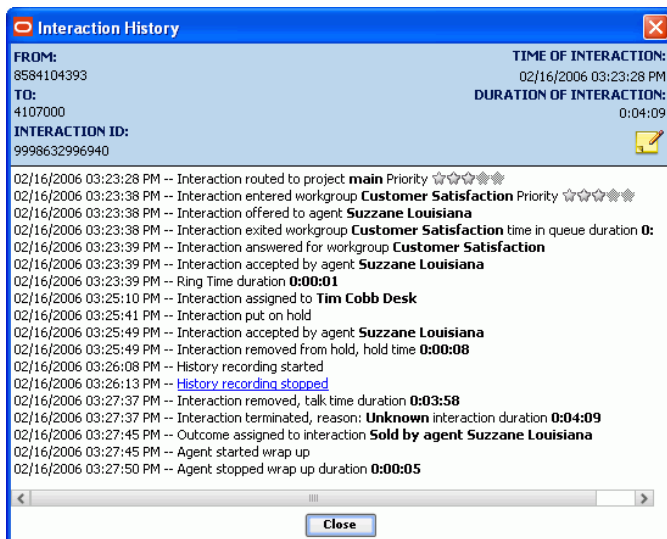
- 3 Double-click on any Interaction Record to view it.



Listening to a Recorded Interaction

You can use IM to record your phone Interactions and listen to the recording later. (Refer to “Recording Calls” on page 62.)

- 1 Find the contact. (Refer to “Finding Contact Records” on page 125.)
- 2 Click the Contact History tab and double-click a specific Interaction to open the details of that Interaction.
- 3 Double-click on a hyperlink.



IM opens your media player and begins to play.

NOTE: It may take some time for your music player to load.

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 note types:

- **Contact Note.** 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 History tab.
- **Interaction Note.** For example, you can record information that was specific to one interaction (such as a complaint that a customer had on a specific day). Interaction notes appear as hyperlinks inside an interaction record.

Adding a Note to the Current Interaction

If you are currently handling an interaction:

- 1 From your workspace, click the Note icon in the Current Session History. The Add Note window opens.
- 2 Type your Note text and click the OK button.

Viewing a Note Attached to the Current Interaction History

- 1 From the Workspace, click the Current Session History tab. A hyperlink to your note appears as an entry in the interaction history.
- 2 Click the Note hyperlink. A window appears showing the contents of the note.

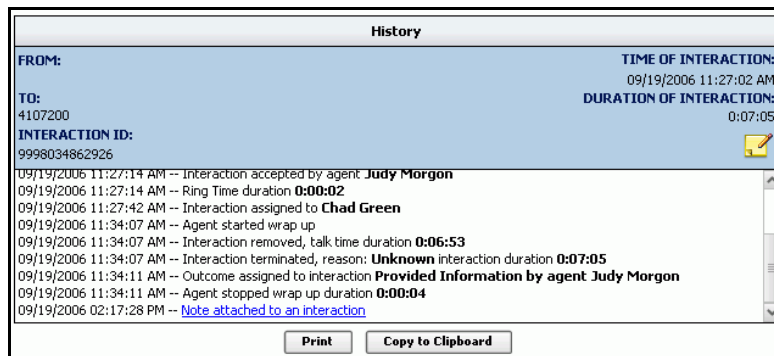
NOTE: You cannot edit an existing note. To change the information, you must create a new note.

Adding a Note to an Existing Interaction Record

- 1 Find the contact. (Refer to ["Finding Contact Records"](#) on page 125.)
- 2 View the Contact History. (Refer to ["Viewing a Contact's History \(Interaction Records\)"](#) on page 135.)
- 3 Double-click on an interaction record to open it.
- 4 Click the Note icon. The Add Note window opens.
- 5 Type your note text and click the OK button.

Viewing a Note Attached to an Existing Interaction

- 1 Find the contact. (Refer to “Finding Contact Records” on page 125.)
- 2 View the Contact History. (Refer to “Viewing a Contact’s History (Interaction Records)” on page 135.)
- 3 Double-click on an interaction record to open it. A hyperlink to a note appears as an entry in the interaction record.



- 4 Click the Note hyperlink. A window opens showing the author, the date, and the contents of the Note.
- NOTE:** You cannot edit an existing note. To change the information, you must create a new note.

Adding a Note to a Contact

- 1 Find the contact. (Refer to “Finding Contact Records” on page 125.)
- 2 Click Contact History.
- 3 Click the Note icon. The Add Note window opens.
- 4 Type your note text and click the OK button.

Viewing a Note Attached to a Contact

- 1 Find the contact. (Refer to “Finding Contact Records” on page 125.)
 - 2 View the Contact History. Any notes that were attached to the contact appear in the History tab. (Refer to “Viewing a Contact’s History (Interaction Records)” on page 135.)
 - 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.

18 Making Calls

This chapter explains how to make different types of call interactions, including internal, outside, PBX, IP/VoIP, and company directory calls. This chapter includes the following topics:

- [Making Calls](#)
 - [Making an Outbound Call](#)
 - [Making an Internal \(Extension\) Call](#)
 - [Making a PBX Call](#)
 - [Making an IP/VoIP Call](#)
- [Redialing a Number](#)

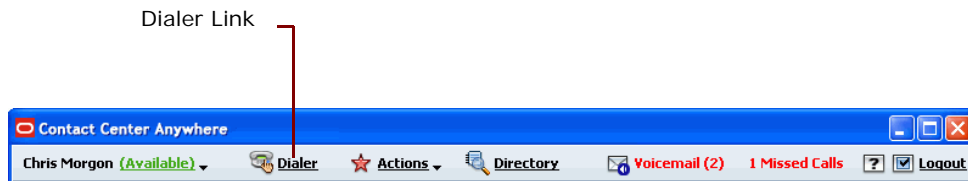
Making Calls

If you have privileges, you can make calls outside your company. If you use the Dialer, you can make these call types:

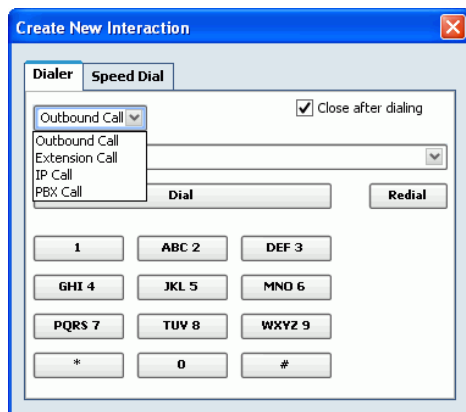
- **Outbound Call.** These are calls you make to phone numbers outside your company.
- **Extension Call.** These are calls you make to the extensions within your company.
- **IP Call.** These are calls you make to software phones running on someone's computer.
- **PBX Call.** These are calls you make to a Private Branch Exchange (PBX).
- **Speed Dial.** Select a predefined number (or numbers) assigned to a longer stored, often used, number for quicker calling.

Making an Outbound Call

- 1 From the Toolbar, click the Dialer link.



The Create New Interaction dialog box opens to the Dialer tab.



- 2 From the drop-down list, select Outbound Call.

NOTE: When you launch the Dialer the first time, the default option is Outbound Call. Afterwards, however, the default is the last number you dialed.

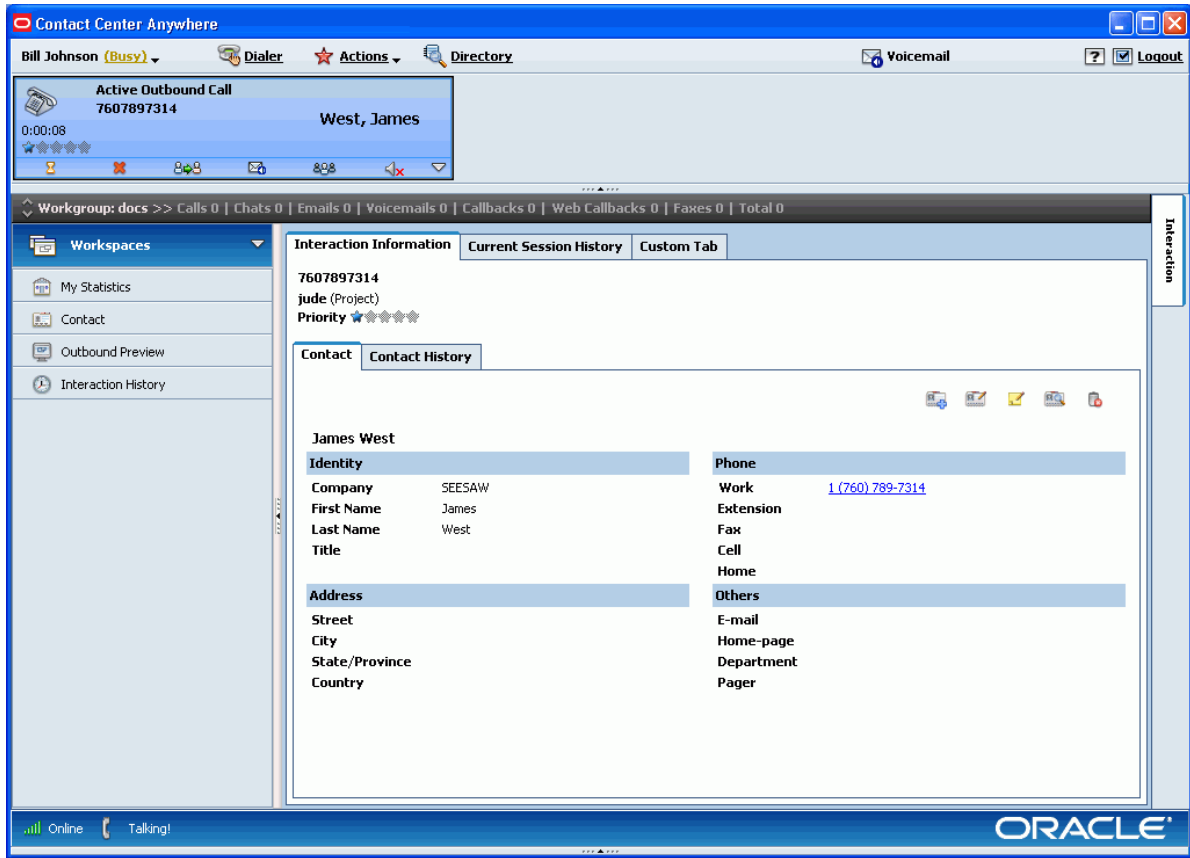
- 3 From the country drop-down list, select a country code and then type the phone number in the box (or click each number on the Dialer's keypad), or use the Speed Dial tab (refer to "Using Speed Dial" on page 145).

NOTE: IM remembers the numbers you dial during your current session. Simply click the down arrow to access previous numbers.

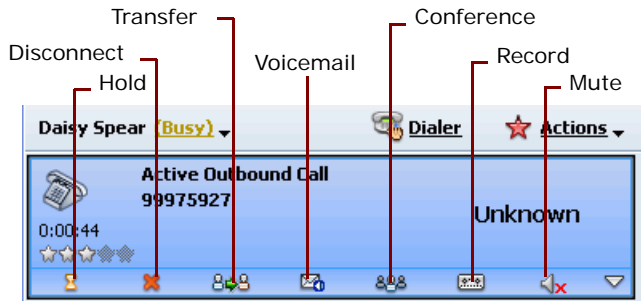
- 4 Click the Dial button. IM calls the number.
- 5 *Recommended:* Click the Close After Dialing check box so that the Dialer window will automatically close after you click Dial.
- 6 *Optional:* Before dialing the number, IM may open the Billing Project window, depending upon your project requirements. If it does, then:
 - a Select a Billing Project from the Name list.
 - b Click OK.

NOTE: Notice that when the call connects, IM changes your status to *Busy*.

- c Interaction information appears, such as the contact's name (if known) and phone number, in the New Outbound Call window (located in the Interaction Control Bar).
- d The Interaction Information tab opens in your workspace, showing additional information about the contact, if available.



- 7 When the contact accepts the interaction:
 - a The New Outbound Call window changes to the Active Outbound Call window and provides links to actions you can perform.



- b A phone handset and the word "Talking!" appears in the Bottom Bar.

Making an Internal (Extension) Call

To call another person in your company, you can use the Dialer (if you know the person's extension) or the Company Directory (if you do not know the person's extension). The following steps describe how to make a call when you know the person's extension. (If you do not know the person's extension, refer to ["Finding Anyone \(Example Searches\)"](#) on page 43.)

- 1 From the Toolbar, click Dialer. The Create New Interaction window opens to the Dialer tab.
- 2 From the drop-down list, select Extension Call.
- 3 Type the extension number in the box (or click each number on the Dialer's keypad), or use the Speed Dial tab (refer to ["Using Speed Dial"](#) on page 145).

If you do not know the extension, find it using the Company Directory. (Refer to ["Finding Anyone in the Company Directory"](#) on page 39.)

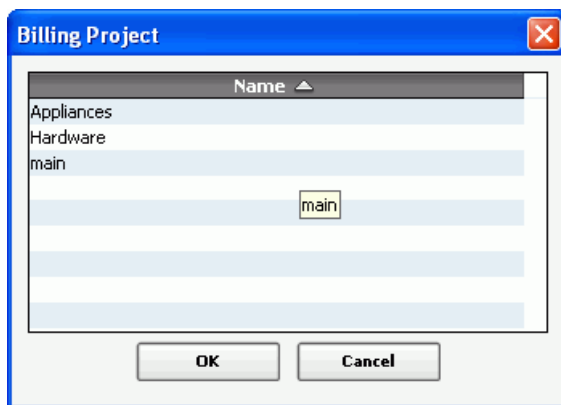
- 4 Click the Dial button. IM calls the number.

NOTE: IM remembers the numbers you dial during your current session. Simply click the down arrow to access previous numbers.

- 5 Click the Close After Dialing check box so that the Dialer window will automatically close after you click Dial.

Optional: Before dialing the number, IM may open the Billing Project window, depending upon your project requirements. If it does, then:

- a Select a Billing Project from the Name list.
- b Click OK.



- 6 After the call connects:
 - a Your status changes to Busy.

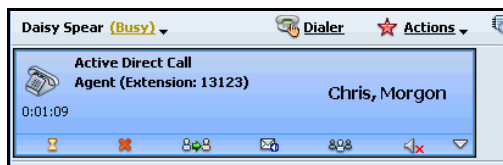
- b Interaction information appears, such as the contact's name and extension, in the New Direct Call window (located in the Interaction Control Bar).



- c The Interaction Information tab opens in your workspace, showing additional information about the contact.



- 7 When the contact accepts the interaction:
 - a The New Direct Call window changes to the Active Call window and provides links to actions you can perform.



- b The phone icon changes to show you are busy talking.
- c A phone handset and the word "Talking!" appears in the Bottom Bar.

Making a PBX Call

If your company uses a Private Telephone Network to provide telephone connections between internal stations and external phone networks, you may be able to make a call using your Private Branch Exchange (PBX).

- 1 From the Toolbar, click Dialer. The Create New Interaction window opens to the Dialer tab.

- 2 From the drop-down list, select PBX Call.
- 3 From the country drop-down list, select a country code and then type the phone number in the box (or click each number on the Dialer's keypad), or use the Speed Dial tab (refer to "Using Speed Dial" on page 145).

NOTE: IM remembers the numbers you dial during your current session. Simply click the down arrow to access previous numbers.

- 4 Click the Dial button. IM calls the number.
- 5 Click the Close After Dialing check box so that the Dialer window will automatically close after you click Dial.

Optional: Before dialing the number, IM may open the Billing Project window, depending upon your project requirements. If it does, then:

- a Select a Billing Project from the Name list.
- b Click OK.

When the call connects:

- c Your status changes to Busy.
- d Interaction information appears, such as the contact's name (if known) and phone number, in the New PBX Call window (located in the Interaction Control Bar).



- e The Interaction Information tab opens in your workspace, showing additional information about the contact, if available.
- 6 When the contact accepts the interaction:
 - a The New PBX Call window changes to the Active PBX Call window and provides links to actions you can perform.



- b A phone handset and the word "Talking!" appears in the Bottom Bar.

Making an IP/VoIP Call

If you have privileges, you can make calls to software phones running on someone's computer:

- 1 From the Toolbar, click Dialer. The Create New Interaction window opens to the Dialer tab.
- 2 From the drop-down list, select IP Call.
- 3 From the type drop-down list, select either SIP (for Session Initiation Protocol call) or H323 (for a packet-switched network call) and then type the number in the box (or click each number on the Dialer's keypad), or use the Speed Dial tab (refer to ["Using Speed Dial" on page 145](#)).

NOTE: To dial a SIP number, use the format: `si p: <IP Address>`

NOTE: IM remembers the numbers you dial during your current session. Simply click the down arrow to access previous numbers.

- 4 Click the Dial button. IM calls the number.
- 5 Click the Close After Dialing check box so that the Dialer window will automatically close after you click Dial.

Optional: Before dialing the number, IM may open the Billing Project window, depending upon your project requirements. If it does, then:

- a Select a Billing Project from the Name list.
- b Click OK.

When the call connects:

- c Your status changes to Busy.
 - d Interaction information appears, such as the contact's name (if known) and phone number, in the New IP/VoIP Call window (located in the Interaction Control Bar).
 - e The Interaction Information tab opens in your workspace, showing additional information about the contact, if available.
- 6 When the contact accepts the interaction:
 - a The New IP/VoIP Call window changes to the Active IP/VoIP Call window and provides links to actions you can perform.
 - b A phone handset and the word "Talking!" appears in the Bottom Bar.

Using Speed Dial

Your Administrator can assign long numbers that your company often uses to unique key combinations, which you can select instead of typing the entire number.

- 1 From the Toolbar, click Dialer and, instead of entering the number, click the Speed Dial tab (Figure 28).

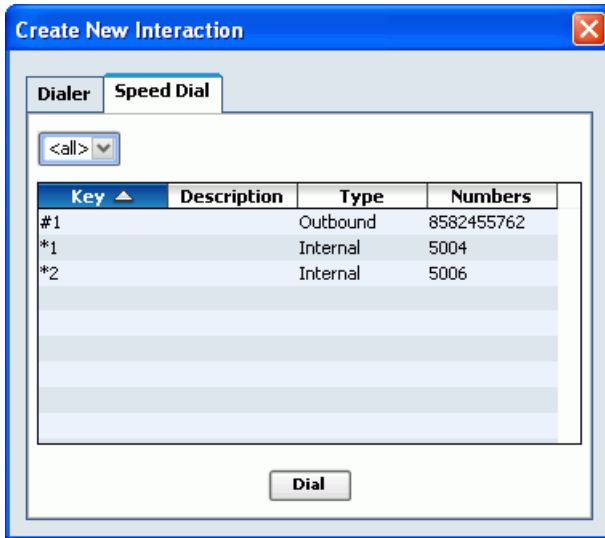


Figure 28. Speed Dial

- 2 From the selection box, select <all> or a list name (provided by your Administrator).
- 3 Double-click on the appropriate key code (or select it and then click Dial). IM dials the number stored for the key.

TIP: For information about the tools CCA provides for managing telephone interactions, refer to Chapter 7, "Managing Phone Interactions."

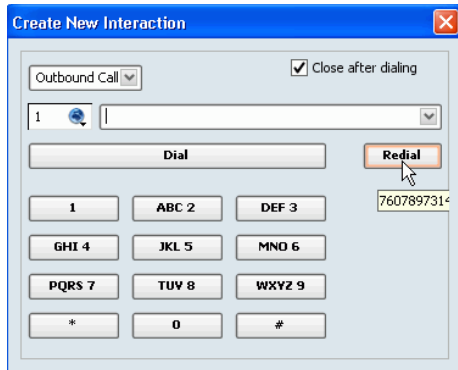
Redialing a Number

No matter what kind of call you make (internal, external, PBX, or IP), you can redial the last number by:

- 1 Selecting Redial from the Action menu on the Toolbar.
or

- 2 Clicking the Redial button in the Dialer's Create New Interaction dialog box.

The last number you dialed appears in the Interaction Control Bar when the connection completes.



19 Tutorial

This chapter explains the new tutorial option (multi-media) for new users and continued education. It includes the following information:

- [Accessing Tutorial](#)

Accessing Tutorial

After new upgrades, upon login you may be offered the option to view a tutorial about the new features or changes made with the update.

- If you accept, the tutorial starts and upon exit or completion, CCA automatically logs you into the application.
- If you decline, you must login as normal.

If you wish to view the tutorial at another time, you can review previous tutorials from the Action menu ([Figure 29](#)).

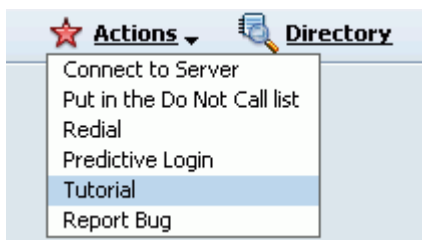


Figure 29. Actions > Tutorial

NOTE: In addition to the update tutorials, system training modules may also be available from the Actions menu.

A

Hotkeys

Table 11 shows shortcuts (hotkeys) you can use to perform 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 11. 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
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

Table 11. Hotkeys

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

B

Searching and Sorting Tips

Searching and Sorting Techniques

You can search for and then sort information in IM using several techniques, including:

- Search by *Matching Any Number of Any Characters* using an Asterisk (*) Wildcard
- Search for *All Information in a Field* using a Percent Sign (%)
- Sort Results using *Multiple Columns* (sort within a sort)
- Searching using a *Wildcard*
- You can type an asterisk (*) anywhere in a word or number for which you are searching (meaning in the beginning, middle or end), which tells IM to match any number of any characters.

Here are some examples:

- 1 If users typed State/Province information as Ca, CA, Calif., and California, you can find all contacts in California by entering the following into the State/Province field:
ca*
- 2 To find all contacts whose work number is in the 212 area code, enter the following into the Work field:
212*
- 3 To find any contact whose title contains the word Sales, enter the following into the Title field:
sal es

Searching for All Field Values

When searching for a contact, you can type a percent sign (%) into a field to return ALL contacts for that field.

If there are too many matches, a message appears requesting additional search criteria to reduce the possible matches.

Multiple Sorting

When your search produces a large list of possible matches, you can sort them by clicking a Column Heading, which helps you find the desired result faster.

Click the same column heading again to reverse the sort order (from ascending to descending and visa versa).

To multi-sort (or sort within a sort), press and hold the Ctrl key while clicking another column.

For example, to sort first by Last Name, click the Last Name column heading. Then, to sort by State while still keeping the last names in order, press and hold the Ctrl key while clicking the State/Province heading.

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