Avaya Interaction Center

Release 7.0

Avaya Agent User Guide

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For the most current versions of documentation, go to the Avaya support Web site:

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COMPAS

This document is also available from the COMPAS database. The COMPAS ID for this document is 107108.

Avaya support

Avaya provides a telephone number for you to use to report problems or to ask questions about your contact center. The support telephone number is 1-800-242-2121 in the United States. For additional support telephone numbers, see the Avaya Web site:

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Contents

Before You Begin

This section includes the following topics:

Typographical Conventions

This guide uses the following font conventions:

Font Type	Meaning
`command`	This font signifies commands, information that you enter into the computer, or information contained in a file on your computer.
`commandvariable`	This font indicates variables in a command string.
italics	This font is used to add emphasis to important words and for references to other chapter names and manual titles.
link	Blue underlined text in online documents indicates a hypertext jump to related information. To view the related material, click the blue underlined text.

Notes, Tips, and Cautions

Note:

A note calls attention to important information.

Important:

An important note calls attention to a situation that has the potential to cause serious inconvenience or other similar repercussions.

Tip:

A tip offers additional how-to advice.

CAUTION:

A caution points out actions that may lead to data loss or other serious problems.

Contacting Technical Support

If you are having trouble using Avaya software, you should:

1. Retry the action. Carefully follow the instructions in written or online documentation.
2. Check the documentation that came with your hardware for maintenance or hardware-related issues.
3. Note the sequence of events that led to the problem and the exact messages displayed. Have the Avaya documentation available.
4. If you continue to have a problem, contact Avaya Technical Support by:
   - Logging in to the Avaya Technical Support Web site http://www.avaya.com/support/
   - Calling or faxing one of the following numbers from 8:30 a.m. to 8:30 p.m. (Eastern Standard Time), Monday through Friday (excluding holidays):
     - Toll free in the U.S. and Canada: 1-888-TECH-SPT (1-888-832-4778)
     - Direct line for international and domestic calls: 1-512-425-2201
     - Direct line for faxes: 1-512-997-4330

- Sending email with your question or problem to crmsupport@avaya.com. You may be asked to email one or more files to Technical Support for analysis of your application and its environment.

Note:

If you have difficulty reaching Avaya Technical Support through the above URL or email address, please go to http://www.avaya.com for further information.

Product Documentation

Most Avaya product documentation is available in both printed and online form. However, some reference material is available only online, and certain information is available only in printed form. A PDF document with detailed information about all of the documentation for the Avaya Interaction Center is included in the `Doc` directory on the product CD-ROM. This PDF document is also included on the separate documentation CD-ROM.

Readme File

The Readme file is a PDF file included on the Avaya Interaction Center software CD-ROM. This file contains important information that was collected too late for inclusion in the printed documentation. The Readme file can include installation instructions, system requirements, information on new product features and enhancements, suggested work-arounds to known problems, and other information critical to successfully installing and using your Avaya software. Avaya may also deliver an Addendum to the Readme, which will be posted on the Avaya Technical Support Website. The Readme Addendum will contain similar information uncovered after the manufacture of the product CD-ROM. Review the Readme file and the Readme Addendum before you install your new Avaya software.

Electronic Documentation

The electronic documentation (in PDF or HTML format) for each Avaya Interaction Center product is installed automatically with the program. Electronic documentation for the entire Avaya product suite is included on the product CD-ROM and the documentation CD-ROM.

You can also view the documentation set online at http://www.avayadocs.com.

Printed Documentation

You can purchase printed copies of these manuals separately. For details, see Document ordering information: on the back of this manual's title page.

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- Through the web at http://www.avaya-learning.com/logon_form.asp
- Over the telephone at 800-288-5327 (within the U.S.) +001 303-406-6089 (outside of the U.S.)
- Through email at Avaya.U.Helpdesk@accenture.com

Chapter 1: Overview

The Avaya Agent, and its integrated component the Web Agent, are installed on your computer desktop as part of the Avaya™ Interaction Center (Avaya IC) software suite. The Avaya Agent and Web Agent make it possible for you to interact with your contact center's customers. You may use one or more of the following features of the Avaya Agent and the Web Agent: Telephony, Email Management, Web Management, Outbound List Processing, and Avaya™ Outbound Contact Management.

This chapter describes how the Avaya Agent and the Web Agent are displayed on your desktop so you can use these features.

This section contains the following topics:

- Avaya Agent
- Web Agent

Avaya Agent and Web Agent Overview

Depending upon the features available in your contact center, you can use Avaya Agent and Web Agent to interact with customers in the following ways:

- Use Telephony to speak with customers who call your company.
- Use Outbound Contact Management to speak with customers that you or the software call on the telephone.
- Use Outbound List Processing to speak with customers that you call on the telephone.
- Use Email Management to read and reply to customer emails.
- Use Web Management to "chat" with customers over the Web by exchanging text messages and Web pages. If desired, you can speak to these customers on the telephone while in a chat session with them, or share Internet browsers with them.

Note:

In this manual, the illustrations show the Avaya Agent displayed on the right side and across the bottom of the desktop. Avaya Agent may look different on your desktop. Contact your system administrator if you need help understanding the setup of Avaya Agent that you see on your desktop.

Avaya Agent

The Avaya Agent is the application that allows you to handle incoming and outgoing contacts with customers. The Avaya Agent is displayed as a framework that surrounds the desktop on your computer monitor. You may see one or all of the following components on the Avaya Agent on your desktop:

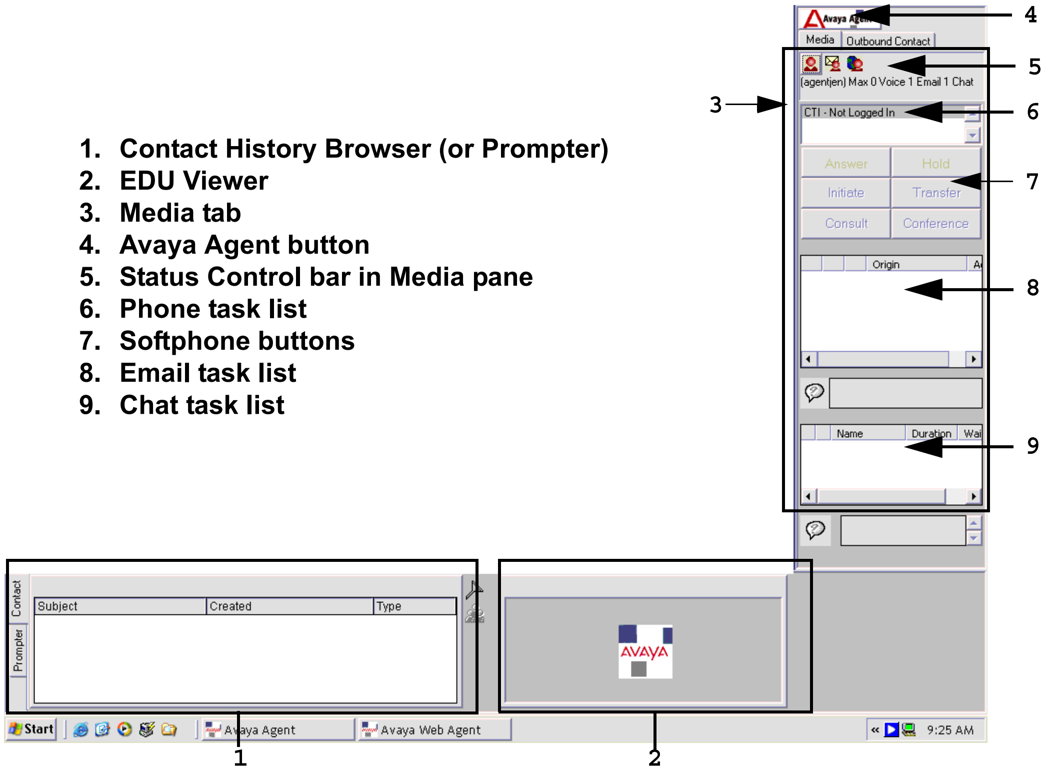
- **Media** tab, which contains:
  - Task lists where you receive telephone calls, emails, and chat requests assigned to you
  - Softphone for speaking with customers who have called (inbound calls)
- **Outbound Contact** tab for automated outbound calling
- **Outbound Lists** tab for manual outbound calling
- **Contact History Browser** tab, which is located on the Contact History Browser, for information about previous contacts your customers have had with your company
- **Prompter** tab, which is located on the Contact History Browser, for scripts telling you what to say to customers
- **EDU Viewer** (Electronic Data Unit Viewer) for information about your current contacts

The Web Agent opens within the Avaya Agent framework when you handle emails and chat sessions. For overview information about the Web Agent, see Web Agent on page 22.

You may also work with other applications, such as Siebel Call Center, which open within the Avaya Agent framework. Similarly, you can set other applications that you work with, such as Microsoft Word, to open within the Avaya Agent framework.

> **Tip:**
>
> Press Alt+Tab to proceed through these applications while looking at the contact information displayed in the Avaya Agent. To move the Avaya Agent behind the other applications, select the check box beside **Always on Top** in the **Avaya Agent** menu to remove the check mark. For information on this option, see Avaya Agent Menu on page 18.

Avaya Agent in the desktop may look like this:



Using Avaya Agent with Multiple Languages

You may be able to communicate with customers in more than one language. The main features of Avaya Agent and Web Agent where you can use multiple languages are:

- Unified Agent Directory
- Email
- Chat
- Spell checking of email and chat contents
- Auto-Sync and Page Push
- Global Resources and Agent Resources
- Email Templates
- Suggested Responses
- Web Self-Service database
- DataWake

Avaya Agent Menu

You access the **Avaya Agent** menu by clicking the **Avaya Agent** button at the top of the right pane. The **Avaya Agent** menu includes the options described in the following table:

Menu Item	Action
Always on top	When this item has a check mark, it ensures that the Avaya Agent always remains on top of other applications on your desktop. If you want the Avaya Agent to go behind other applications, select this menu item to remove the check mark.
Change Password	If this option is available, you can select it to change your Avaya Agent password. If it is not available, you will be prompted to change your Avaya Agent password when the current one expires.
Help	Displays the Avaya Agent online help.
About Avaya Agent	Displays information about this Avaya Agent application release.
Minimize	Minimizes the Avaya Agent. To restore the Avaya Agent, click the **Avaya Agent** icon on the Windows task bar.
Exit	Closes Avaya Agent, the Web Agent, and all open Avaya focuses.

Avaya Agent Tabs

The Avaya Agent usually displays the following three tabs that you can click to use a set of features:

- Media Tab
- Outbound Contact Tab
- Outbound Lists Tab

Media Tab

The **Media** tab is usually displayed whenever you log in to Avaya Agent. When this tab is displayed, you can handle your incoming voice, email, and chat contacts.

The tab contains a Status Control bar with icons or buttons that indicate or control your current agent state and the status of your media channels. The Status Control bar displays an **Agent** button and a button (or icon) for each inbound media channel (Voice, Email, and Web Chat) for which you are enabled. (A button is different from an icon. You can press a button, which has a frame around it, to control your status. An icon does not have a frame around it and you cannot press it.)

Tip:

The buttons are only available if you are working in manual mode. For more information, see Setting Manual Mode on page 54.

The text below the Status Control bar displays the following information:

- Your login ID
- Your channel load in the media channels (the maximum number of customer contacts of each media channel that you can handle at a time)

In the example below, the agent (jerry) is currently available for Voice, Email, and Chat. This agent can handle up to one voice contact, one email contact, and one chat contact at the same time.

1. **Avaya Agent button**
2. **Media tab**
3. **Status Control bar with Agent button, Voice icon, Email icon, and Chat icon)**
4. **Your login ID and Voice, Email, and Chat channel loads**

Outbound Contact Tab

Avaya™ Outbound Contact Management (Outbound Contact) automates outbound calling activities. The software runs outbound jobs by automatically dialing customer telephone numbers and displaying customer information for you.

For information about using Outbound Contact, see Chapter 7: Handling Outbound Contact Calls on page 193.

Outbound Lists Tab

Your company may ask you to use Outbound List Processing to call customers in a list. The **Outbound Lists** tab is usually beside the **Media** tab.

For information about using Outbound List Processing, see Chapter 8: Managing Outbound Lists on page 215.

Task Lists

Depending on your company and your responsibilities, you may see any or all of the following task lists in the **Media** pane of your Avaya Agent:

- Phone task list, described in Using the Phone Task List and Softphone on page 82
- Email task list, described in Using the Email Task List on page 99
- Chat task list, described in Using the Chat Task List on page 132

When incoming contacts are assigned to you, they are displayed in the appropriate task list. The task list also displays relevant information, such as the time the contact was assigned to you and the state of the contact. Some of the information is indicated by the icons that represent the contacts.

Tip:

If you select a contact and hold your mouse over it for a moment, you will see a "tooltip" with some of the same information about the contact. This tooltip may be easier to read than the information within the task list and it may contain additional information.

To begin responding to an incoming contact, you must double-click the contact in the task list.

Softphone

Softphone makes it possible for you to perform standard telephone operations using your computer instead of a physical telephone. Your Softphone interface is in the **Media** pane of Avaya Agent. This interface contains the Phone task list and the telephony buttons that you use to manage your incoming and outgoing voice contacts.

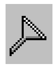
For information on the Softphone, see Using the Phone Task List and Softphone on page 82.

Contact History Browser and EDU Viewer

You use the Contact History Browser and the EDU Viewer (Electronic Data Unit Viewer) to locate information about the contacts in your task lists. Each tab in the Contact History Browser contains the history of a contact in your task lists. Each tab in the EDU Viewer contains current information about a contact in your task lists.

An EDU is a set of information about an active contact (voice, email, or chat). The EDU Viewer displays an EDU for each contact that you are currently handling.

The bottom frame of the Avaya Agent also contains buttons that you use to access the following:



- **Contact History Filter** – Filters the records in the Contact History Browser to access only the historical information you need for the current customer contact.

- **Active Contact Viewer** – Displays information about any other active contacts from the same customer. Usually these are email contacts assigned to other agents.

Prompter Scripts

Your system administrator develops Prompter scripts to assist you while you handle contacts. Each script is designed to provide a consistent method for you and other agents to communicate with customers. It ensures that you obtain information from customers and give them other information, as your company requires. Prompter scripts may contain statements for you to say to customers. They may also contain option buttons and text fields you use to indicate a customer's answers, and a selection of reasons that explain the customer's question and how you handled the contact.

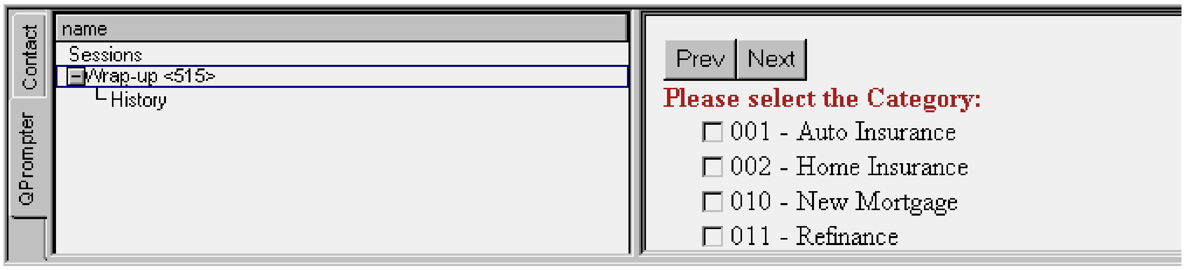
You may use Prompter scripts to do the following:

- Collect information about customers
- Provide answers and information to customers
- Enter wrap-up information about a contact with a customer
- Contact a customer for a marketing or sales campaign

Each answer that a customer gives determines the next step in a Prompter script. For example, if a customer calls with a problem about a product they purchased from your company, the script is different for a customer who has a valid product warranty than for a customer who does not.

A Prompter script may be displayed automatically at certain times, for example when you answer a customer contact or when you press the **Next Call** button in the **Outbound Lists** pane.

As shown in the following example from a Prompter wrap-up script, Prompter scripts are displayed in the **Prompter** pane. In the out-of-the-box Avaya Agent, the **Prompter** pane is displayed in the frame that runs across the bottom of your desktop.



Web Agent

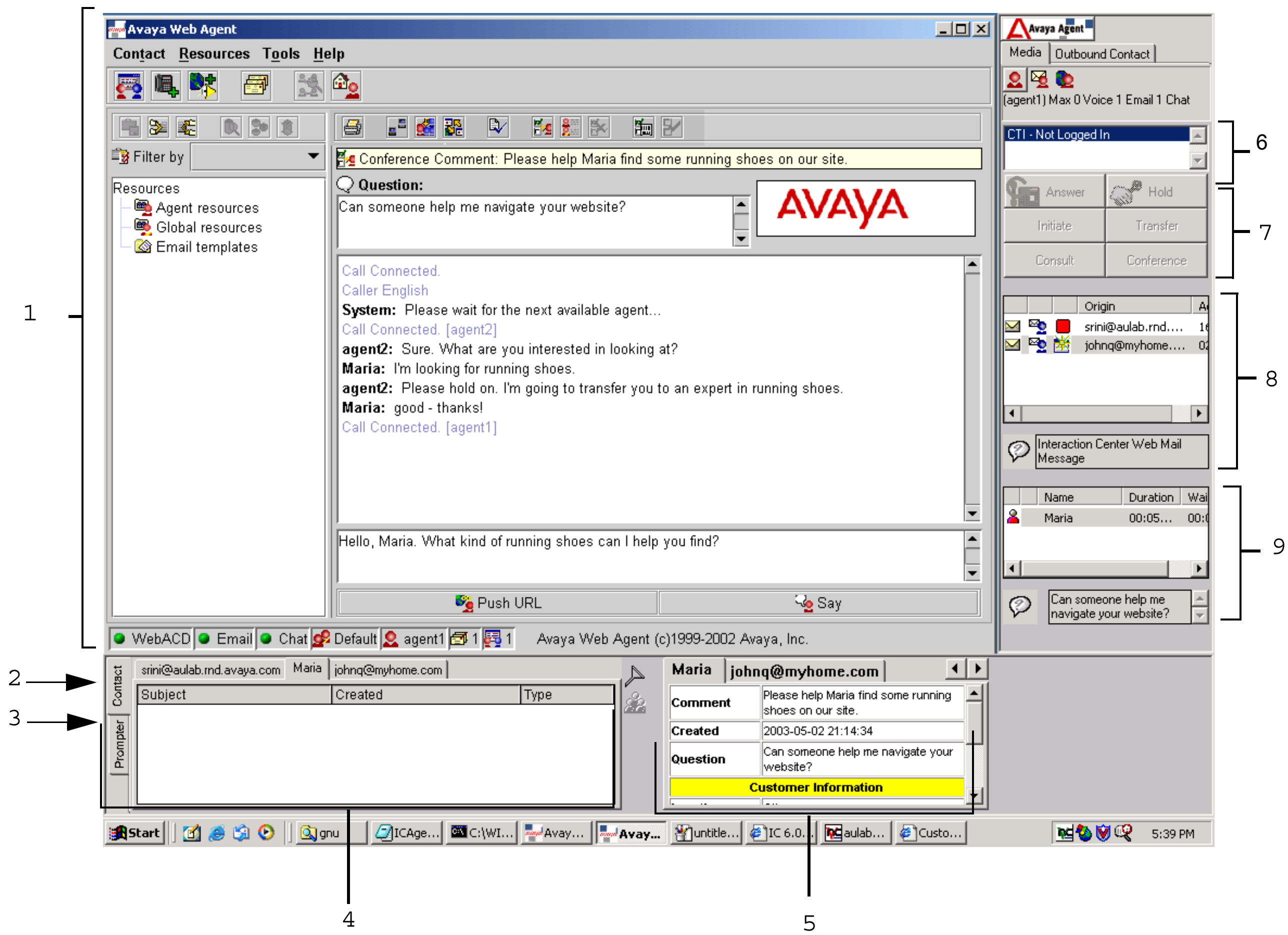
The Web Agent is the component of Avaya IC that makes it possible for you to interact with customers using Email Management or Web Management. With Web Management, you conduct a chat session with customers. While in a chat session, you can use the following features:

- Text Chat (exchanging typed messages with your customer in real-time)
- Voice Chat (talking to your customer, using either Chat & Phone or Chat & VoIP)
- Shared Browsing (viewing the same Web pages with your customer, using the Auto Sync, Page Push, and Collaborative Form Filling features)

Customers send an email or initiate a chat session by clicking an appropriate button on your company's Web site. According to your availability for email or chat, some of these emails and chat requests are assigned to you as email contacts or chat contacts. When you double-click a contact in your Email task list or your Chat task list, the Web Agent is displayed. The Web Agent is where you compose your email responses and conduct your chat sessions.

When you log in to Avaya Agent, you log in to the Web Agent automatically.

The Avaya Agent with the Web Agent and an active chat contact in the desktop looks like this:



1. **Web Agent**
2. **Contact tab (for Contact History Browser)**
3. **Prompter tab (for Prompter scripts)**
4. **Contact History Browser (switches to Prompter when you click Prompter tab)**
5. **EDU Viewer**
6. **Phone task list**
7. **Softphone buttons**
8. **Email task list**
9. **Chat task list**

The appearance of the Web Agent changes, according to what you are doing. This section explains the features of the Web Agent window while you are handling email or chat contacts, under the following topics:

- The Web Agent While Handling Email
- The Web Agent While Handling Chat

- The Web Agent in Supervisor Mode
- The Web Agent Status Bar
- The Web Agent Information Bar
- Web Agent Menus
- The Web Agent Toolbars

The Web Agent While Handling Email

If you are enabled for email, you will use the Web Agent together with the Avaya Agent to handle email contacts from customers. You will use two email modes in the Web Agent:

- Email Preview – This is a read-only view of the customer's email. If you click the **Reply**, **Reply to All**, or **Forward** buttons in the email toolbar, the view changes to Compose mode.
- Compose – This is where you write a reply to an email or originate an email.

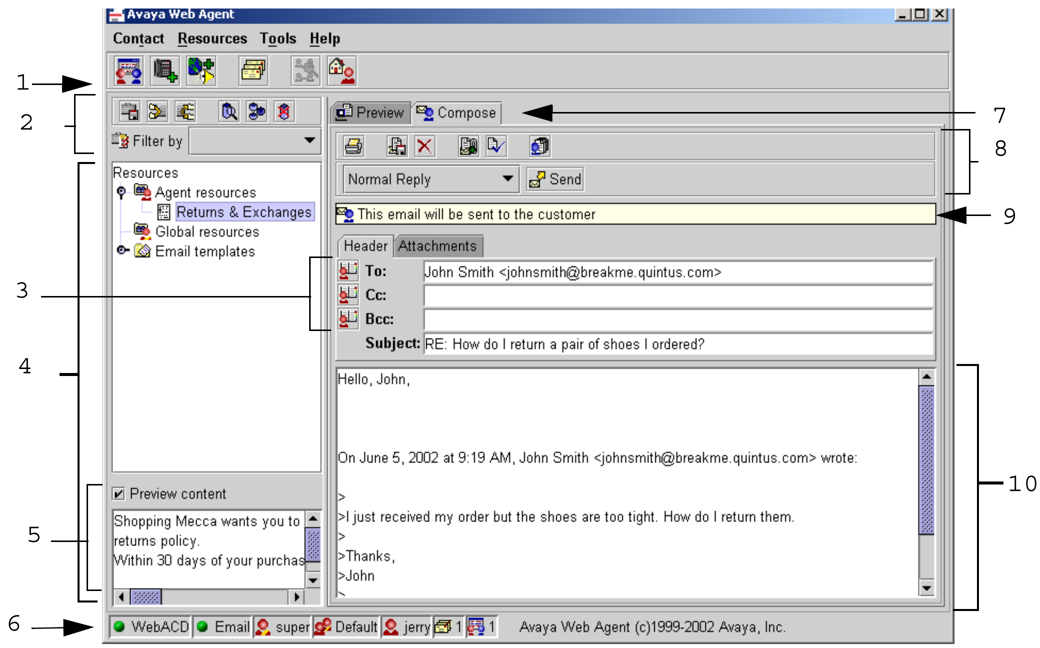
You can switch between the two modes by clicking the **Preview** tab or the **Compose** tab. If you are handling multiple emails simultaneously, each email will have its own **Compose** tab for your reply.

The following sections describe the features of the Web Agent window while handling email

- Features Common to Email Preview and Compose Modes
- Features of Email Preview Mode
- Features of Compose Mode

Features Common to Email Preview and Compose Modes

The following illustration shows an email reply that an agent is composing in the Web Agent.



1. **Main toolbar**
2. **Resource toolbar and filters**
3. **Unified Agent Directory (UAD) buttons**
4. **Resource area**
5. **Resource preview scroll box**
6. **Status Bar**
7. **Tabs for active email**
8. **Email Compose toolbar and drop-down menu**
9. **Information Bar**
10. **Message Composition area**

The features of the Web Agent window that are common to the Preview and Compose modes are as follows:

- Menu Bar – The names of three menus containing commands: **Contact**, **Resources**, and **Tools**. Click the name of a menu to open it and display the commands.
- Main Toolbar – Buttons below the menu bar for quick access to frequently used commands. The toolbar remains the same, whether you are currently in Email mode or Chat mode. See The Main Toolbar on page 33.
- Resource Toolbar and Filters – Buttons for resource-related commands and a **Filter** menu for displaying only the type of resources you want to see. See Resource Toolbar on page 39.

- Resource Area – Pane of window that contains resources, previously prepared text responses, emails, and URLs (Internet addresses) that you can send to customers. It may contain folders for each of the following: Agent Resources, Global Resources, Email Templates, and Suggested Responses.
- Resource Preview Scroll Box – When you select a resource from a folder and then select the **Preview content** check box, a scroll box displays the contents of the resource.
- Information Bar – An area that displays important information about the current email. If you switch to a chat contact, it displays information about your active chat. See The Web Agent Information Bar on page 31.
- Status Bar – Icons that indicate certain aspects of your current Web Agent status. See The Web Agent Status Bar on page 30.

Features of Email Preview Mode

The following areas are displayed only in Email Preview mode:

- Company Logo – Area that displays a logo that represents a company. If your contact center supports different companies or tenants, the logo may change, according to the Web site from which the customer sent the active email.
- Email Preview Toolbar – Toolbar with buttons that let you perform various actions to the email, such as reply to, forward, defer, resolve, or transfer the email, open attachments to the email, or view previous emails this customer sent to the contact center. See Email Toolbar in Email Preview Mode on page 34.
- Customer Email Header Area – Information about the customer's email, consisting of the email address of the customer, any other addresses to which the email was sent, the date and time the email was sent, and the subject that the customer entered for the email. If you click the UAD buttons, you can find and add addresses of people in your company. For detailed technical information about the active email, click the **Header** check box.
- Customer Message Area – Box where you can read the customer's email. You cannot edit the text in the message in Email Preview mode.

Features of Compose Mode

The following areas are displayed only in Compose mode:

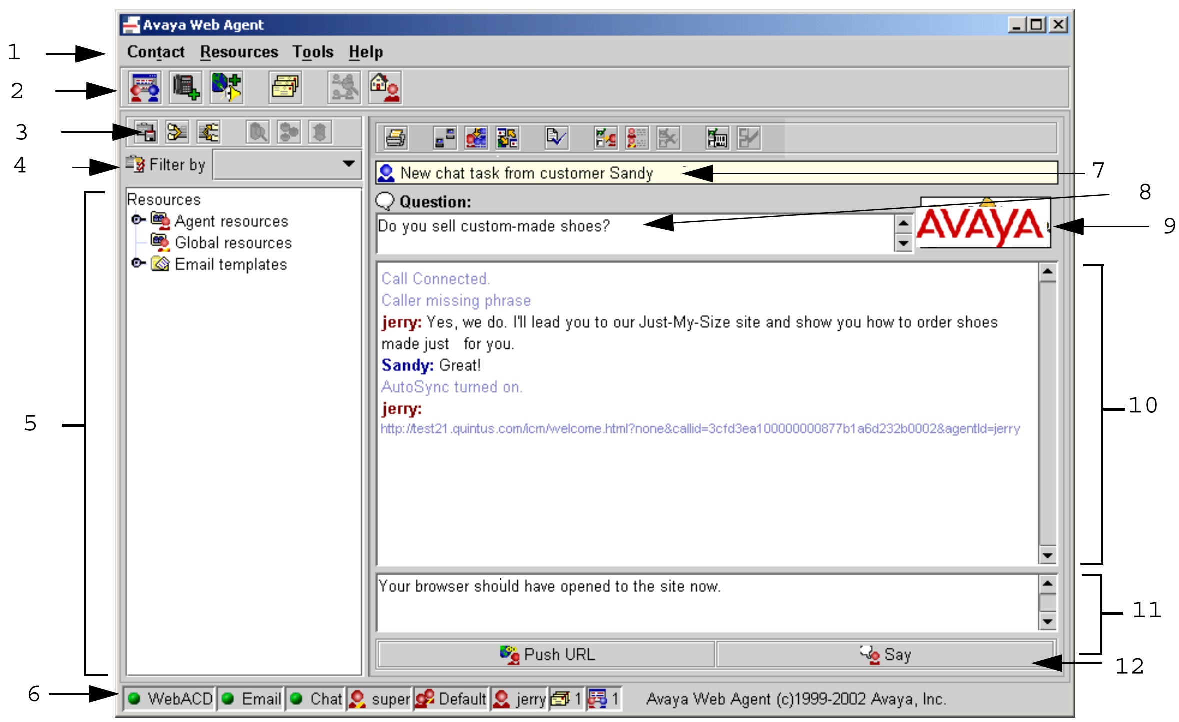
- Compose Toolbar – The Compose toolbar contains buttons that let you perform various actions to your email reply, such as print, save a draft, cancel, add attachments, spell check, see email history. See Email Toolbar in Email Preview Mode on page 34.
- Drop-down Menu and Send Button – The menu lets you choose whether this is a normal reply, a message to an external agent, or a request to the customer for additional information. (An external agent is a person outside the company who has been designated as a subject matter expert who can help customers when agents request

their assistance.) The **Send** button sends the email that is currently in the Message Composition area to the addresses in the header fields.

- Outbound Email Header Area – Tab that displays information about the email you are composing, with the addresses to which the email will be sent and the subject of the message.
- Attachments Area – Tab that lets you attach files to the email and displays information about any files you have attached.
- Message Composition Area – Area where you compose an email. It may contain the message that you are replying to in addition to the message that you compose.

The Web Agent While Handling Chat

The following illustration shows the Web Agent window during a chat session.



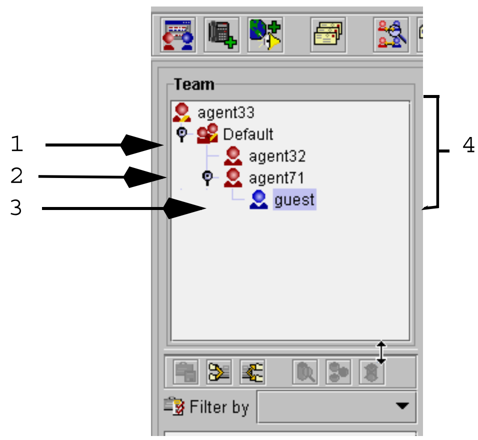
1. **Menu Bar**
2. **Main toolbar**
3. **Resource toolbar**
4. **Resource filters**
5. **Resource area**
6. **Status Bar**
7. **Information Bar**
8. **Customer's question**
9. **Company logo**
10. **Transcript area**
11. **Text entry area**
12. **Send bar**

The features of the Web Agent window in Chat mode are as follows:

- Menus – The names of menus that contain commands. Click the name of a menu to open it and display the commands.
- Main Toolbar – Buttons below the menu bar for quick access to frequently used commands for email or chat. See The Main Toolbar on page 33.
- Resource Toolbar and Filters – Buttons for resource-related commands and a **Filter** menu for displaying only the type of resources you want to see. See Resource Toolbar on page 39.
- Resource Area – Pane that contains resources, which are previously prepared text responses, emails, and URLs (Internet addresses) that you can send to customers. The resource area may contain folders for Agent Resources, Global Resources, and Email Templates.
- Resource Preview Scroll Box (not shown) – When you select a resource from a folder and then select the **Preview content** check box, a scroll box displays the contents of the resource.
- Company Logo – Area that displays a logo that represents a company. If your contact center supports different companies or tenants, the logo may change, according to the Web site from which the customer requested the current chat session.
- Chat Toolbars – The main chat toolbar contains buttons for controlling the current chat session. Additional toolbars are added when you conduct a Chat & Phone or a Chat & VoIP session. See Chat Toolbars on page 37.
- Send Bar – Buttons for sending a URL that opens in your customer's browser and for sending the text you entered in the Text Entry area to your customer.
- Information Bar – An area that displays important information about your active chat session. If you switch to an email contact, it displays information about your active email. See The Web Agent Information Bar on page 31.
- Customer's Question – Area that displays the original question typed by the customer on the Web site. This area also displays other information about the customer and the site from which the customer requested the chat. This information can also help you identify guest users (people who log on to the company Web site without a user account).
- Transcript Area – Area that displays the chat conversation that has occurred so far between you and the customer.
- Text Entry – Area where you enter text or URLs to send to the customer.
- Status Bar – Icons that indicate certain aspects of your current Web Agent status.

The Web Agent in Supervisor Mode

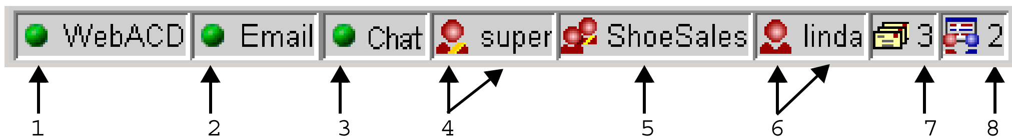
If you are a supervisor, you can click the **Switch to Supervisor Mode** button whenever you want to monitor a chat session. The Web Agent displays a Supervisor Mode panel, as shown in the following illustration, showing all the chat sessions that agents in your workgroup are currently conducting.



1. **Workgroup**
2. **Agent**
3. **Customer**
4. **Current chat sessions**

When you select the session you want to monitor, the Transcript and Text Entry areas display the chat session. See Monitoring a Chat Session (Supervisors Only) on page 164 for more information.

The Web Agent Status Bar

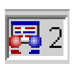


1. **Status of connection to WebACD Server**
2. **Status of connection to IC Email Server**
3. **Status of connection to the Chat Server**
4. **Your supervisor's status and login ID**
5. **The name of your workgroup**
6. **Your status and login ID**
7. **Your current email contact load**
8. **Your current chat contact load**

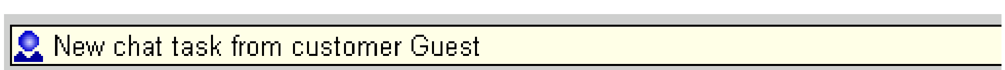
The bottom of the Web Agent, as shown in the above illustration, contains a Status Bar with icons that show aspects of your current Web Agent status.

The following table describes the icons on the Web Agent Status Bar, from left to right.

Icon	Description
 WebACD Connection Status	Shows the status of your connection to the WebACD Server (Web Automatic Call Distribution Server) with the following colors: ● Red – Your Web Agent is not connected to the WebACD server. ● Orange – Your Web Agent is in the process of connecting to the WebACD server. ● Green – Your Web Agent is connected to the WebACD server.
 Email Server Connection Status	Shows the status of your connection to the Email Server, which handles your email contacts. The colors are the same as for the WebACD Server.
 Chat Server Connection Status	This icon is only present when you are handling one or more chat contacts. It shows the status of your connection to the Chat Server. The colors are the same as for the WebACD Server.

Icon	Description
 Supervisor Status and Login ID	If you are an agent, shows your supervisor's login ID and indicates whether the supervisor is currently logged in. The supervisor icon has a stripe on the shirt so you can distinguish it from your own icon. The shirt color indicates your supervisor's login status, as follows: ● Grey – Your supervisor is not online. ● Red with yellow stripe – Your supervisor is logged in. If you are a supervisor, the Status Bar does not have a Supervisor icon.
 Workgroup	The name of the workgroup to which you belong. The icon does not change color.
 Agent Status and Login ID	Displays your login ID and your agent status with the following shirt colors: ● Grey – You are not logged in to the Web Agent. ● Red/Yellow – You are logged in.
 Chat channel load	Shows your availability for chat and, if you are available, your chat channel load (the maximum number of chat customers you can currently handle at the same time). Zero means that you are currently unavailable to help chat customers. The icon does not change color.
 Email channel load	Shows your availability for email and, if you are available, your email channel load (the maximum number of email customers you can currently handle at the same time). Zero means that you are currently unavailable to receive email contacts. The icon does not change color.

The Web Agent Information Bar



The Web Agent has an Information Bar to call your attention to important information, whether you are in an email contact or a chat contact. The Information Bar may display messages like the following:

- New inbound email from a customer.
- New chat request from customer.

- This email will be sent to customer.
- Response rejected during quality assurance.
- Transfer request successful.

Web Agent Menus

The Web Agent has three menus, available from the menu bar at the top of the window: **Contact**, **Resources**, and **Tools**. Many of the menu options perform the same action as buttons in the toolbars.

Tip:

You can use shortcut keys to access menus and their options quickly. To open a menu, press the Alt key and then the letter that is underscored in the menu name (Alt-T opens the **Contact** menu, Alt-R opens the **Resources** menu, and Alt-O opens the **Tools** menu). When the menu opens, you can use the shortcut key beside the option you want to select.

The menus are as follows:

- **Contact** menu – This menu displays commands related to chat and email contacts. The **Print** command prints whatever is displayed in the current window to the default printer. When you have an active chat contact, you can use the **Auto Sync**, **JoinUs**, and **Sametime** (if installed) options. See Managing Chat Contacts on page 131 for information on these features. You can use the **Spell Check** option at any time to check an email or a chat. You can use options to transfer and wrap up a contact.
- **Resources** menu – A set of commands related to resources (pre-written text, URLs, and emails) that you can send to customers. With one set of options, you can create, delete, save, and view your own Agent resources. With the **Expand all folders** and **Collapse all folders** options, you can determine whether you view all resource folders or only the main folder (or folders). You can also use the **Filter by** drop-down list to limit the display to the types of resources you want to see.

  Tip:

  The Resources toolbar above the Resource area has some additional commands related to resources.
- **Tools** menu – This menu contains a set of commands that link to Web pages for agents and customers, a set of two commands that relate to email, and the **Preferences** command that lets you customize the look of the Web Agent and set various options related to chat and email.

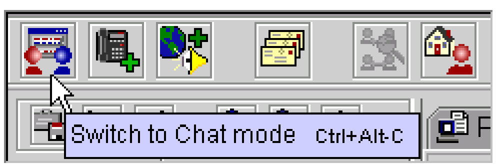
The Web Agent Toolbars

The Web Agent has several toolbars containing buttons that you can click to perform commands. The main toolbar is always present near the top of the Web Agent. The other toolbars depend on your current customer interaction. The toolbars are as follows:

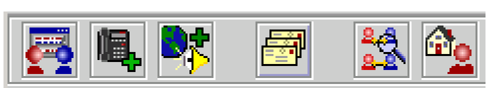
- The Main Toolbar
- Email Toolbar in Email Preview Mode
- Email Toolbar in Compose Mode
- Chat Toolbars
- Voice Chat Toolbars
- Resource Toolbar

Tip:

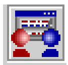
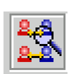
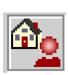
Any time you do not remember what a button does, hold your cursor over the button for a moment. The Web Agent displays either the name or a description of the button, as shown in the following illustration. It also shows the keyboard shortcut that you can use to perform that command, such as pressing the Control key, the Alt key, and then the letter “c” to switch to Chat Management.



The Main Toolbar

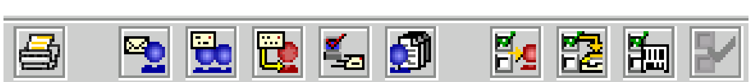


You use the main toolbar in the Web Agent for both Email Management (email) and Web Management (chat). The buttons in the main toolbar let you quickly access frequently used commands that are also available in the menus. The buttons in the main toolbar, from left to right, are as follows:

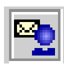
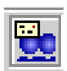
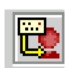
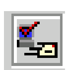
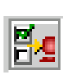
Button	Action
 Chat	Switches the Web Agent to the Chat mode. If a chat contact is selected in the Chat task list, the current chat session is displayed. If you are currently handling more than one chat session, you can switch from one session to another by changing the chat contact that is selected in the Chat task list.
 Chat & Phone	Switches the Web Agent to the Chat & Phone mode. This makes it possible for you to speak with a customer over the telephone while the customer remains in the chat session with you.
 Chat & VoIP	Switches the Web Agent to the Chat & VoIP Mode. This makes it possible for you to speak with your customer through a connection between your telephone and the customer's Internet connection. While you speak with each other, you and your customer remain in the chat session together.
 Email	Switches the Web Agent to the Email Mode. If an email contact is selected in the Email task list, the current email is displayed. The email may be displayed in Email Preview mode or Compose mode, depending on your latest view of this email. If you are currently handling more than one email, you can switch from one email to another by changing the email contact that is selected in the Email task list.
 Supervisor	(*Supervisors only*. If you are not a supervisor, the button is disabled.) In this mode, a panel displays icons for the chat sessions that agents in your workgroup are currently conducting.
 Agent Home	Opens your Internet browser and displays a page where you can search for documents to the frequently asked questions (FAQs) on the Web Self-Service pages or submit your own documents to these pages. Submitted documents are reviewed by an administrator and may be accepted or rejected.

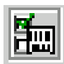
Email Toolbar in Email Preview Mode

The email toolbar has a different set of buttons, depending on whether you are looking at the customer's email (in Email Preview mode) or composing an email reply (in Compose mode).

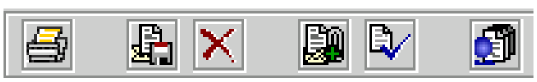


When you click an email contact in your Email task list, the Web Agent displays the customer's email in Email Preview mode, as indicated by the tab above the email. This is a read-only view of the email. The Email Preview toolbar is above the tab. The buttons in this toolbar, from left to right, are as follows:

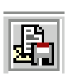
Button	Action
 Print	Prints the currently displayed email to the default printer.
 Reply	Displays the Compose mode of the Web Agent window. The default window in Compose mode is a Normal Reply, which addresses your reply to the sender of the email, and no one else. You can change this to Send to External Agent or Request Additional Info to compose those special types of email.
 Reply to All	Displays the Compose mode of the Web Agent window and addresses your reply to the sender of the email and to all the people listed in the **Cc** (Copy) field of the message you are replying to.
 View Attachments	This icon indicates that the email has one or more attachments. Click the icon to see the name of the attachment or attachments. If you click the name of an attachment, it usually opens in your browser or in a program on your desktop, such as Microsoft Word. If the attachment does not open, see your administrator.
 Forward	Forwards a copy of this email to the people whose addresses you enter in the **To**, **Cc**, and **Bcc** fields. See Forwarding an Email on page 115 for information.
 Resolve	Lets you apply a status to the email. For example, you may use a status of Dismiss if a customer sends you a "thank you" and all the customer's questions have been answered. See Resolving an Email on page 122 for information.
 Email History	Displays a dialog box with information about the current email and any previous emails sent from the current customer's email address. You can also see copies of the emails. See Viewing Email History on page 101 for more information.
 Transfer	Displays the Unified Agent Directory (UAD) so you can transfer this email contact. You can transfer it to a queue and let Avaya IC route the email to the first available agent in that queue. You may also be able to transfer it to a particular agent, supervisor, or external agent. For information, see Transferring an Email Contact on page 112.

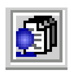
Button	Action
 Defer	Puts the current email message on hold, giving you a chance to research the customer's question or problem. Any reply that you have composed is saved automatically as a draft. You can receive another email contact to replace a deferred email. For more information, see Deferring an Email on page 113.
 Wrap	Puts you in WrapUp state. While in WrapUp state, you cannot receive another email contact to replace this contact. You may be asked to fill out information about this email contact while you are in WrapUp state. For more information, see Wrapping Up an Email Contact on page 129.

Email Toolbar in Compose Mode

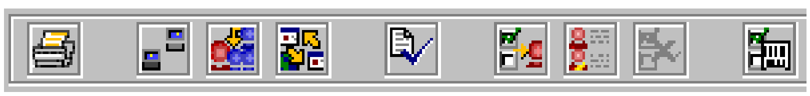


When you are viewing an incoming email in Email Preview mode and you click **Reply** or **Reply to All**, the Web Agent displays the email in Compose mode, as indicated by the tab above the email. This is where you compose your reply to the customer. Above the tab is the Compose toolbar. The buttons in this toolbar, from left to right, are as follows:

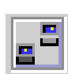
Button	Action
 Print	Prints the currently displayed email to the default printer.
 Save Draft	Saves a draft of the current email reply that you are composing. You can return to the email by clicking its **Compose** tab. The email contact remains in your Email task list.
 Cancel	Displays a dialog box that asks if you want to save a draft of the reply you are composing. If you say **No**, your reply is deleted, and you must compose a new reply for this email contact.
 Attach	Displays a dialog box where you can locate a file and attach it to the current email reply.

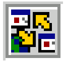
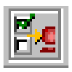
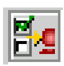
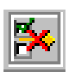
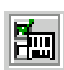
Button	Action
 Spell Check	Displays a dialog box that helps you check the spelling of the current email reply, interactively. **Note**: You can set a preference to have this spelling dialog box come up automatically after you click **Send**. See Setting Preferences on page 180.
 Email History	Displays a dialog box with information about the current email and any previous emails sent from the current customer's email address. You can also see copies of the emails. See Viewing Email History on page 101 for more information.

Chat Toolbars



When you are engaged in a chat session, the main chat toolbar is located on the right side of the Web Agent above the chat transcript area. This toolbar contains buttons you use to control the chat session. The buttons in the toolbar, from left to right, are as follows:

Button	Action
 Print	Prints the currently displayed chat messages to the default printer.
 Start Auto Sync  Stop Auto Sync	(You see this button when **Auto Sync** is off.) Starts an Auto Sync session so that your customer's browser displays the same Web pages as your browser as you navigate through Web pages. See Using Auto Sync on page 139 for more information. (You see this button when **Auto Sync** is on.) Stops an Auto Sync session.
 JoinUs	Starts a JoinUs session in which friends of your customer can join the chat session. See Handling a JoinUs Conference on page 161 for more information.

Button	Action
 Sametime	Starts a Lotus Sametime session with your current chat customer. You can only use Sametime if it is installed and configured on your desktop. See Setting Preferences on page 180.
 Spell Check	Displays a dialog box that helps you check the spelling of text that you have typed in the Text Entry area before you send it. **Note:** You can set a preference to have this spelling dialog box come up automatically after you click **Say**. See Starting a Lotus Sametime Session on page 167.
 Transfer	Displays the Unified Agent Directory (UAD) so you can transfer this chat to another agent or to a queue. For information, see Involving Other Agents in a Chat Contact on page 152.
 Conference	Displays the Unified Agent Directory (UAD) so you can invite one or more agents to join this chat. For information, see Involving Other Agents in a Chat Contact on page 152.
 Cancel Transfer/ Conference	This button is only active after you initiate a transfer or a conference of a chat contact and before the second agent accepts the chat contact. Cancels the transfer or conference of a chat and returns it to your desktop. For information, see Cancelling the Transfer or Conference of a Chat Contact on page 157.
 Wrap	Puts you in WrapUp state. While in WrapUp state, you cannot receive another chat contact to replace this contact. You may be asked to fill out information about this chat contact while you are in WrapUp state. For more information, see Wrapping Up a Chat Contact on page 170.

Voice Chat Toolbars

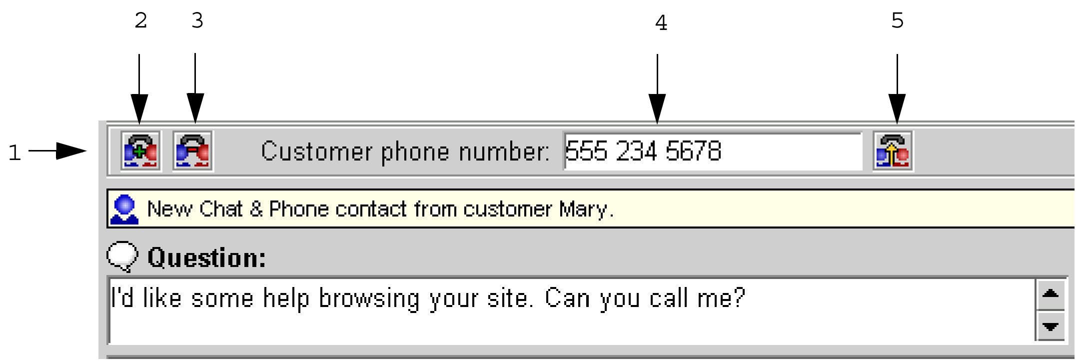
When you are in a chat session, you can handle two types of Voice Chat:

- Chat & Phone – You and your chat customer speak to each other over the telephone.
- Chat & VoIP – You speak to your chat customer over your telephone while your customer speaks to you over the Internet.

Customers can request a Chat & Phone session or a Chat & VoIP session on the company Web site. In that case, the Web Agent will display the Chat & Phone toolbar or the Chat & VoIP toolbar, according to the customer's request.

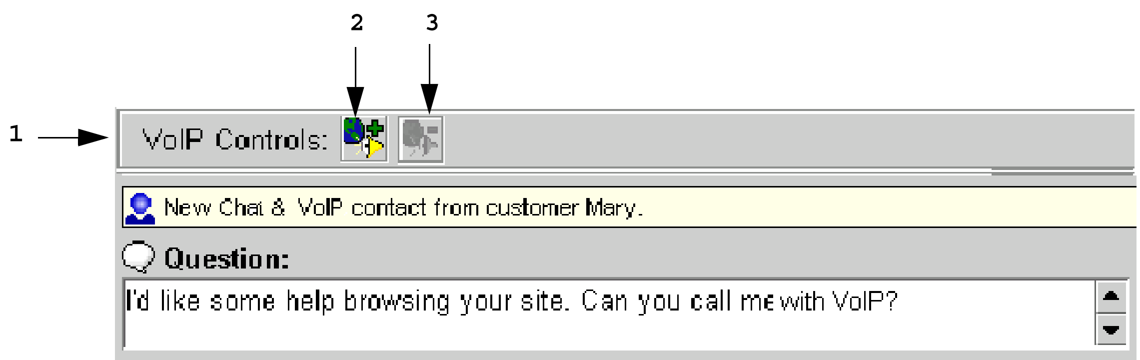
If the customer does not request one of these two Voice Chat options on the Web site, but you and your customer think that it will be helpful, you can initiate a Chat & Phone session by clicking the **Chat & Phone** button. (Only the customer can initiate a Chat & VoIP session.)

When you are handling a Chat & Phone, you see the Chat & Phone toolbar. In the following illustration, the customer requested a Chat & Phone.



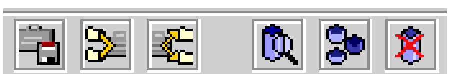
1. **Chat & Phone toolbar.**
2. **Request Phone Number button.**
3. **Cancel Request button.**
4. **Customer phone number field.**
5. **Initiate Phone Call button.**

When you are handling a Chat & VoIP, you see the Chat & VoIP toolbar. In the following illustration of this toolbar, the customer requested a Chat & VoIP.

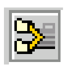
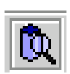
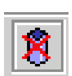


1. **Chat & VoIP toolbar.**
2. **Initiate VoIP request button.**
3. **End VoIP button.**

Resource Toolbar



Resources in the Web Agent are previously prepared text, emails, and URLs (Internet addresses) that you can send to customers whenever the information is needed. This saves you the time and the tedium that it would take to type the same information repeatedly. The Resources toolbar sits above the Resource area on the left side of the Web Agent. The buttons in this toolbar, from left to right, are as follows:

Button	**Action**
 Save	Saves the resources that you have created or modified.
 Collapse All	Hides all resource folders under the single folder that contains them.
 Expand All	Shows all resource folders and all their contents (subfolders and the resources themselves).
 View	When you select a resource and then click this button, the **View Resource** dialog box opens to display the contents of the resource. You cannot modify the resource.
 Edit	When you select a resource and then click this button, the **Edit Resource** dialog box opens and lets you modify the contents of the resource if you want.
 Delete	When you select a resource and then click this button, the resource is deleted.

Chapter 2: Managing Avaya Agent

This chapter provides you with step-by-step instructions for tasks that you do in Avaya Agent. These tasks apply to the three media channels (Voice, Email, and Chat).

This section includes the following topics:

Note:

Depending on how your system administrator defined Avaya Agent for your company, some of the Avaya Agent components discussed in this chapter may not be available to you.

Logging In and Logging Out

You must log in to Avaya Agent for every work session and log out to end the session. You must use a login ID and password to log in. You will be given a password to use when you log in the first time. You will need to change that password to a new password that you choose. You may need to choose a new password again within certain periods of time, such as every 30 days.

Note:

You must log out at the end of every work session. If you do not log out at the end of a work session, problems may occur. For example, you may not be able to defer email contacts.

If your Avaya IC system uses a feature called Business Advocate, you will have two different sets of login IDs and passwords, one for Outbound Contact and one for your work you do from the **Media** tab. When you switch between these two types of work, you must log out of Avaya Agent and log back in with the other login ID and password.

SECURITY ALERT:

Be sure to read the section System Security on page 44 for rules about creating and using passwords.

Your Avaya Agent may use “free seating.” With free seating, your personal settings and preferences are attached to your login ID and password. Therefore, you can log in to different workstations at your contact center, and Avaya Agent will open with your personal settings and preferences.

CAUTION:

With free seating, you should only log in to one workstation at a time. If you want to change from one workstation to another, be sure to log out of the first workstation before you log in to the second one.

When you log in to Avaya Agent, you also log in automatically to Web Agent, and to either Avaya™ Outbound Contact Management (Outbound Contact) or the media channels (Voice, Email, and Web Chat). See Agent Blending on page 210 for information about switching between Outbound Contact and the media channels.

Logging In to Avaya Agent

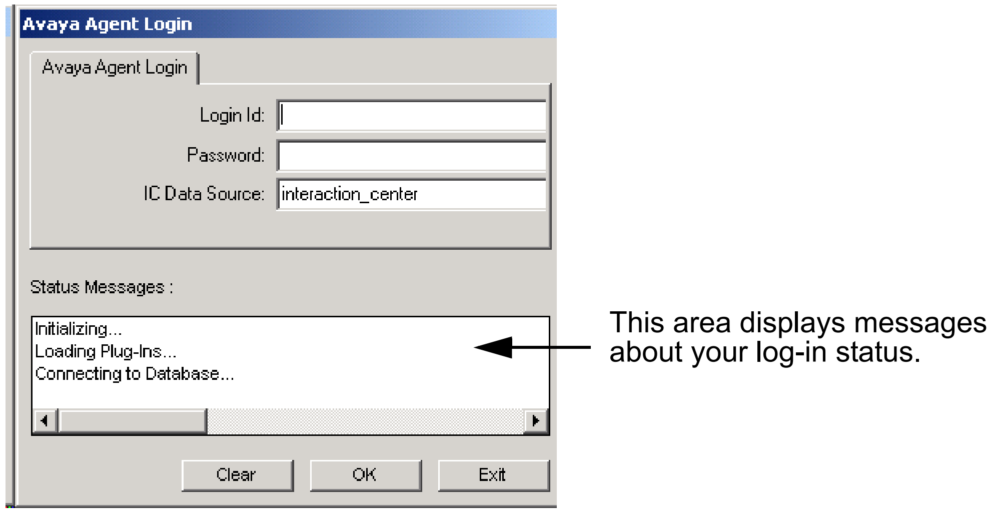
If your contact center hosts Avaya Agent on Citrix, instead of your workstation, you must access Avaya Agent on Citrix before you can log in. For more information, see Accessing Avaya Agent on Citrix on page 47.

To log in to Avaya Agent:

1. Double-click the Avaya **Agent** icon on your desktop.

   If your desktop does not have an Avaya Agent icon, select the Avaya Agent shortcut from the Windows Start menu. For example, select **Start > Programs > Avaya**

Interaction Center 7.0 > Interaction Center. Your Avaya Agent **Login** dialog box may look like this:



2. In the Avaya Agent **Login** tab, enter your login ID and your password in the appropriate text box.

Note:

If you plan to use Outbound Contact and you have a different login ID and password for that, be certain to enter the correct login ID and password.

Note:

Type your password carefully. If you enter an incorrect password a certain number of times, you may be locked out of the system. If this happens, see your administrator.

SECURITY ALERT:

Be sure to read the section System Security on page 44 for rules about creating and using passwords.

Tip:

The **IC Data Source** field has been set for you. You can ignore this field unless system administrators indicate that you should change it.

You may need to change your password.

Avaya Agent automatically adds your login ID and password to the appropriate text boxes in the other tabs to log you in to the other channels.

3. If your system includes Softphone, you may need to complete the additional fields in the Softphone tab. These fields may include the following:

Field Name	Field Description
Agent ID	Logs you on to the telephone switch and makes sure that all voice contacts assigned to your Agent ID are sent to your telephone.
Agent Password	Confirms your identity to the Automatic Call Distributor (ACD) telephone system.
Station ID	Identifies the station or equipment number of your telephone.

4. Click **OK**.

   Status messages show the progress of your login. If your login ID and password are valid, Avaya Agent is displayed on your desktop.

   Note:

   To use Outbound Contact, you must log in to Avaya Agent at the workstation that has the Phone Type assigned to your login ID. Contact your administrator if you cannot log in to Outbound Contact.

5. Check your Avaya Agent Status Control Bar, located at the top right of your screen, to confirm that you do not have all zeros for your channel loads. Your channel loads are the number of contacts in a media channel (Voice, Email, or Chat) that you can handle at the same time.

   Note:

   If your channel loads across all available channels are set to zero, contact your system administrator to make sure that the servers are running. If the servers are running, re-set your channel loads (see Setting Your Channel Loads on page 55).

System Security

You have an important responsibility to help keep your system secure. Observe the following rules to ensure the security of the system:

- When you are required to change your password, choose one that is easy for you to remember but would be impossible for anyone to guess.
- You may need to follow certain rules about the length of the password and the number and type of characters it contains.
- Ask your administrator if you need help creating your password.
- Never write down your password.

- Never share your password with anyone.
- Contact your administrator immediately if you suspect any security problems, such as a computer "virus," unusually slow response times, or other abnormal behavior of the system.

Logging In and Out of Media Channels

When you log in to Avaya Agent, you log in to all the media channels (Voice, Email, or Chat) for which you are enabled. However, you can also log in and out of individual media channels if you want to limit your contacts to one or two channels at a particular time. For example, you may want to log in to the voice channel and log out of email and chat channels. Then you will receive new voice contacts only.

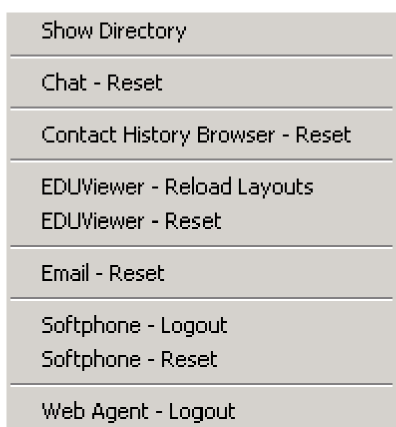
The login and logout options in the Avaya Agent pop-up menu change, depending on your current state in a media channel. For example, if you are logged in to the Web Agent, you see the **Web Agent - Logout** option in the menu, not the **Web Agent - Login** option.

Note:

When you log in to Outbound Contact, you cannot log in to the channels on the **Media** tab. For more information, see Logging In to Outbound Contact on page 196 and Logging out of Outbound Contact on page 210.

To log in or out of a media channel:

1. Right-click any blank area of Avaya Agent to display the pop-up menu, as shown below.



Note:

If you are logged in to a channel, the menu option for that channel says **Logout**. If you are logged out of the channel, the menu option says **Login**.

2. From the pop-up menu, click one of the following:
   - **Web Agent - Login** (or **Logout**) – Lets you log in to (or log out of) the Web Agent so that you can respond to chat and email contacts.
   - **Softphone - Login** (or **Logout**) – Lets you log in to (or log out of) the voice (telephony) channel so that you can respond to voice contacts.

   Note:

   Only log out of a media channel if instructed to do so by your administrator or if you will be handling automated outbound calls using Outbound Contact.
3. In the Avaya Agent **Login** dialog box, enter your login ID, password, and any other information required for the media channel.
4. Click **OK**.

Logging Out of Avaya Agent

When you log out of Avaya Agent, you automatically log out of all your Avaya applications also. You may need to enter the reason that you are logging out of Avaya Agent.

If your contact center hosts Avaya Agent on Citrix, instead of your workstation, you must log out through the Avaya IC tools for Citrix. For more information, see Accessing Avaya Agent on Citrix on page 47.

To log out of Avaya Agent:

1. Change your agent state to AuxWork.

   If you log out in an Available state, Avaya Agent may automatically place you in an Available state and deliver contacts to you when you log back in. For information on how to change your agent state, see Changing Your Agent State on page 51.
2. Click the **Avaya Agent** button at the top of the Avaya Agent.
3. Select **Exit** from the **Avaya Agent** menu.

   If you did not change your state to AuxWork, Avaya Agent displays a message advising you to change your agent state.
4. If a **Logout** dialog box is displayed, select a reason. Then click **OK**.

Accessing Avaya Agent on Citrix

If your contact center uses Citrix, Avaya Agent is on a Citrix server not on your workstation. You use an Avaya IC tool to access Avaya Agent on the Citrix server. After you access the server, you can work with Avaya Agent normally.

Avaya provides two tools that you can use to access Avaya Agent on the Citrix server. The Web browser tool opens in Internet Explorer. The Executable tool opens as a dialog box.

The Avaya IC tools for Citrix:

- Connect you to Avaya Agent and the other agent applications that you need on the correct Citrix server.
- Ensure that Avaya Agent sizes properly in the Citrix client interface.
- Ensure that you can properly exit from the Citrix server and the Citrix interface.
- Help you re-connect to the Citrix server if you encounter a problem.

This section includes the following topics:

- Using the Web Browser Tool on page 47
- Using the Executable Tool on page 49

Important:
The Avaya IC tools for Citrix that you see on your desktop may look different from the illustrations. The text for the links on the Web browser tool and the text on the buttons in the Executable tool may have been customized for your contact center. Contact your supervisor or system administrator if you need help understanding the tools that you see on your desktop.

Using the Web Browser Tool

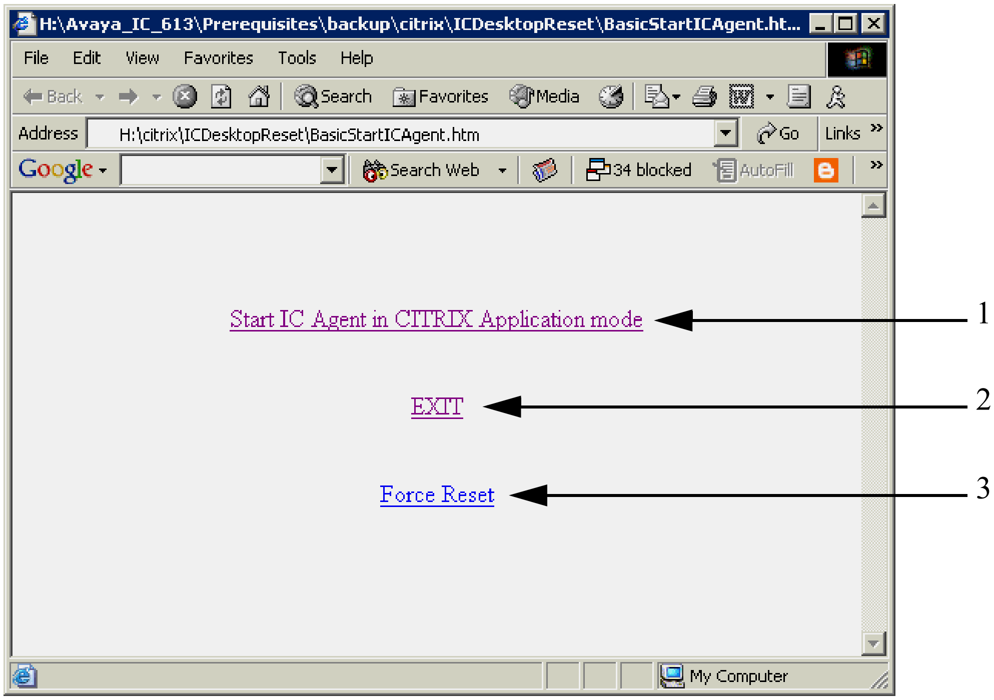
The Web browser tool displays as a Web page in Internet Explorer that you use to access Avaya Agent on Citrix. After you use the Web browser tool, Internet Explorer displays Avaya Agent and other agent desktop applications published on the Citrix server.

This section includes the following topics:

- About the Web Browser Tool on page 48.
- Accessing Avaya Agent with the Web Browser Tool on page 48.

About the Web Browser Tool

The following illustration shows the default appearance of the Web browser tool. The table below the illustration describes the function of each link in the Web browser tool.



Item	Default link text	Description
1.	Start IC Agent in CITRIX Application mode	Click this link to access Avaya Agent or another Avaya IC agent desktop application on Citrix server.
2.	EXIT	Click this link to exit from the Web browser tool and the Citrix interface.
3.	Force Reset	Click this link to force a reset of application after failure.

Accessing Avaya Agent with the Web Browser Tool

⚠ **Important:**

You must use the following steps in the correct sequence when you use the Web browser tool to access Avaya Agent and other agent desktop applications in the Citrix interface. If you do not follow this sequence, you may have problems with the Citrix interface.

For information about how to log in and log out of Avaya Agent, see Logging In and Logging Out on page 41.

To access Avaya Agent with the Web browser tool:

1. In Internet Explorer, open the Web browser access page for the agent desktop applications.

   The link for the access page should be in your **Favorites** folder. If you cannot locate the link, contact your Supervisor.

2. Click the **Start** link.

   Avaya Agent on the Citrix server starts.

3. Log in to the agent desktop application through Citrix.
4. Handle contacts with customers and perform required tasks in Avaya Agent.
5. Log out from Avaya Agent in Citrix.
6. Click the **Exit** link to exit the Web browser tool.

Using the Executable Tool

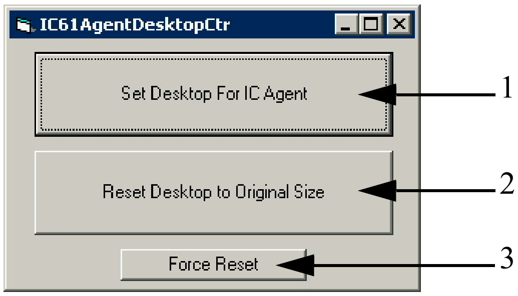
The Executable tool opens as a dialog box on your workstation. After you use the Executable tool, the Citrix client interface opens a window that displays Avaya Agent and other Avaya IC agent desktop applications published on the Citrix server.

This section includes the following topics:

- About the Executable Tool on page 50.
- Accessing Avaya Agent with the Executable Tool on page 50.

About the Executable Tool

The following illustration shows the default appearance of the dialog box opened by the Executable tool. The table below the illustration describes the function of each button in the dialog box.



Item	Default link text	Description
1.	Set Desktop For IC Agent	Select this button to access Avaya Agent or another Avaya IC agent desktop application on Citrix server.
2.	Reset Desktop to Original Size	Select this button to exit from the Executable tool and the Citrix interface.
3.	Force Reset	Select this button to force a reset of application after failure.

Accessing Avaya Agent with the Executable Tool

Important:
You must use the following steps in the correct sequence when you use the executable tool to access Avaya Agent and other agent desktop applications in the Citrix interface. If you do not follow this sequence, you may have problems with the Citrix interface.

For information about how to log in and log out of Avaya Agent, see Logging In and Logging Out on page 41.

To access Avaya Agent with the Executable tool:

1. On your desktop, double-click the shortcut icon for access to the Executable tool and Avaya Agent.

   If you do not have a shortcut on your desktop, contact your Supervisor.
2. Select the **Set Desktop For IC Agent** button.

   Avaya Agent on the Citrix server starts.
3. Log in to the agent desktop application through Citrix.

4. Handle contacts with customers and perform required tasks in Avaya Agent.
5. Log out from Avaya Agent in Citrix.
6. Select the **Reset Desktop to Original Size** button to exit the Executable tool.

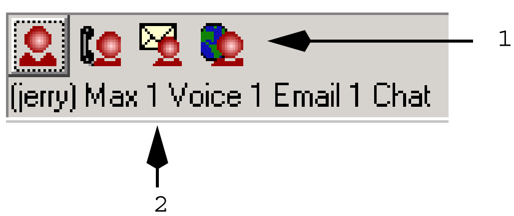
Setting Your Availability

At any point in time, you are either available or unavailable to handle contacts in the media channels. If you are available, contacts are assigned to you by the system.

You can set two basic types of availability:

- Your channel loads – The maximum number of contacts you can handle in a media channel at any one time. For example, if you have a channel load of 3 emails, you could have a maximum of three emails assigned to you at one time.
- Your agent state – Whether you are available at a particular moment to handle contacts. Agent states are Available, Aux-work (Busy), and Init. aux-work (Transition between Available and Aux-work). Your agent state may apply to all media channels or to a single media channel.

You can view or control your channel loads and your agent state through the Avaya Agent **Media** pane, as shown below.



1. **Right-click a channel button (voice, email, or chat) to change a channel load.**
2. **Current channel loads**

Changing Your Agent State

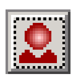
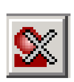
You can make yourself available or unavailable to receive voice, email, or chat contacts or to make outbound calls. Your current state of availability to handle contacts is called your agent state.

The **Agent** button in the Status Control bar indicates your current agent state. If you are in automatic mode, when you click the **Agent** button, you set your agent state for all channels simultaneously. See Changing State Across All Media Channels on page 53 for more information.

Important:
When using a physical phoneset in conjunction with Softphone, you should avoid changing states using the physical phoneset. For example, if Softphone is preset to enter the Ready state after a call ends, and you set your physical phoneset to enter the WrapUp state after a call ends, Softphone and your physical phoneset may be out of sync when you end a call. To prevent this condition, try to use Softphone to change states.

If your administrator has given you permission to enter manual mode, you can also change your agent state for single channels individually. This would allow you to click media channel buttons to make yourself Available for one channel (Voice, for example), while you are in Aux-work (Busy) for other channels (Email and Web Chat, for example). See Changing State in a Single Media Channel on page 53 for more information.

The three agent states are shown in the following table:

Agent State	Agent Button	Description
Available		You are available to accept new contacts. In manual mode, some media channels may be unavailable, as shown by an *X* on the buttons.
Aux-work (Busy)		You are busy and are unavailable to accept contacts. In automatic mode, you are unavailable in all media channels so the **Agent** button and *all* media channels have an *X*. In manual mode, the **Agent** button and any unavailable media channels have an *X*. Click to enter Aux-work when you go to lunch, handle Outbound Contact calls, research a customer's problem, or do any activity where you cannot handle a contact. Wrapping up a contact is not considered Aux-work.
Init. aux-work (Transition)		You are in a transition state between Available and Aux-work. For example, you have attempted to log out with one or more contacts that need to be wrapped up. In both automatic and manual modes, the **Agent** button has a grey *X* when you are in this state. At your contact center, you may need to enter the reason for entering Aux-work and wrap up all active contacts on your desktop.

If you are using a DEFINITY telephone switch and the Auto-In or Manual-In work modes, you can also change your agent state by pressing buttons on your physical telephone. For information, see Using Softphone with DEFINITY Switches on page 86.

For information on making yourself available for outbound calling through Outbound Contact, see Joining Outbound Jobs on page 196.

For information about entering or changing the reason you are in Aux-work state, see Entering Reason You Are Unavailable on page 56 or Using Softphone to Set a Reason for Being Unavailable on page 85.

Changing State Across All Media Channels

Your mode of operation determines how much control you have over your agent state. Depending on how Avaya Agent is configured, you may work in either of the following modes of operation:

- Manual mode
- Automatic mode

In automatic mode, the **Agent** button is the only one you can click. Click the **Agent** button until it changes to the desired agent state. The other media channels change to the same state.

The Status Control bar for an agent in automatic mode set to Aux-work (Busy) in all media channels looks like this:

Changing State in a Single Media Channel

If you are in manual mode, you can change your agent state for a single media channel. For example, you can make yourself available for voice while you are unavailable (in Aux-work) for chat.

To change your agent state for one media channel (manual mode only):

- Click the media channel button on the Status Control bar until the button changes to the desired agent state:
  - Available – The button does not have a yellow *X*.
  - Aux-work (Busy) – The button has a yellow *X*.
  - Init. aux-work (Transition) – The button has a grey *X* as your state changes between Available and Aux-work.

  OR

- Right-click the media channel button in the Status Control bar. Then click the pop-up menu option to change your agent state for that media channel.

  The pop-up menu options change according to your agent state for each media channel.

Setting Manual Mode

If your administrator has given you permission to use manual mode, you can set your agent state and channel loads manually. This means that you can reduce your channel loads if you want. In manual mode, you can also change each of the Voice, Email, and Web Chat channels individually from Available to Busy, and from Busy to Available. In other words, you can be Busy in one channel while Available in other channels.

When you are in manual mode, the Status Control bar contains channel buttons that you can click. The following illustration shows the Status Control bar in manual mode:

In manual mode, you can do the following things:

- Set your agent state across all media channels
- Set your agent state for only one media channel
- Set your channel load

To enter manual mode:

1. Right-click in the Avaya Agent Status Control bar.
2. Click **Options** in the menu to open the **Channel load** dialog box.
3. In the **Channel load** dialog box, select the **Manual Mode** check box.
4. Click **Apply**.

Note:

If you cannot access the **Manual Mode** check box, your administrator has set your channel loads. Contact your administrator for further assistance.

Automatic Mode

In automatic mode, when you click the **Agent** button, you can only change your agent state across all media channels at the same time. You cannot change your agent state for a single channel. Therefore, you are always in the same agent state in all media channels.

When you are in automatic mode, the Status Control bar on the **Media** tab has only button—the **Agent** button. You cannot select the Voice, Email, and Web channels icons.

Setting Your Channel Loads

For each type of contact that you handle, you have a channel load, which is the number of contacts in that media channel that you are enabled to handle at one time. You may be able to adjust your channel loads, but they can never be higher than channel ceilings that your administrator set for you. (The channel ceiling is the absolute maximum number that you can ever handle at one time.)

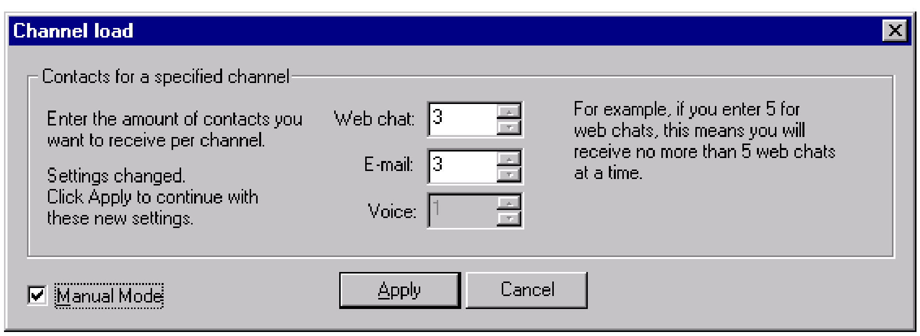
For example, if your administrator has set up your account so that the channel ceiling for chat contacts is three, you can set your chat channel load to three, two, one, or even zero. But with a ceiling of three, you can never change your channel load to four chat contacts.

To be able to adjust your channel loads, your user account must be set up for permission to work in manual mode. If you can select the **Manual Mode** check box in the **Channel load** dialog box, that means that you have permission to adjust your channel load.

To set your channel loads:

1. Right-click a media channel button in the Avaya Agent Status Control bar.
2. Click **Options** from the pop-up menu.

   The **Channel load** dialog box is displayed.



3. Select the **Manual Mode** check box if it is not already selected.

   Note:

   If you cannot select the **Manual Mode** check box, you cannot adjust your channel load. Contact your administrator for further assistance.

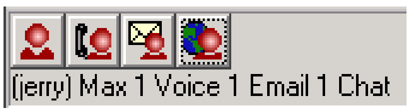
4. Enter the maximum number of contacts you want to be able to handle in the text box next to the appropriate channels. Click the up arrow to increase the number or the down arrow to decrease the number.

   If the number stops changing when you click the arrow, you have reached the ceiling that your administrator set for you. For example, you may not be able to set more than 1 or 2 chats.

   If any field is disabled, you are not set up to handle sessions in that channel.

5. Click **Apply**.

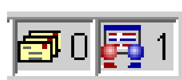
   The Avaya Agent Status Control bar shows the channel loads that you entered, which is the *maximum* number of contacts that you can handle for each channel. The following illustration of the Avaya Agent Status Control bar shows that the agent can handle a maximum of 1 voice contact, 1 email contact, and 1 chat contact.



Note:

The Web Agent Status Control bar shows your *current* loads for chat and email, as set by the program rules. These are called *contact* loads. The routing servers can reduce this number at any time according to program rules that consider the number and type of contacts you are handling, the number of contacts currently in the system, and so on. Therefore, the numbers can change while you are in your current login session. Your current *contact loads* as shown in the Web Agent may be less than the *channel loads* shown in the Avaya Agent.

The following illustration of Web Agent Status Bar icons indicate a current contact load of 0 emails and 1 chat session. At the current time, this agent cannot receive any email contacts, but later the agent may be able to receive one again.



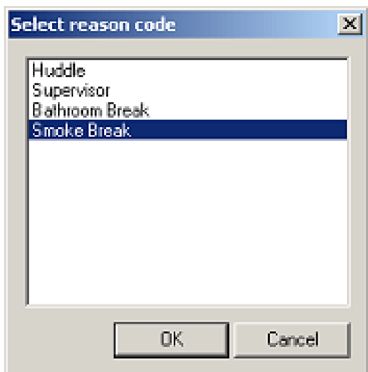
Entering Reason You Are Unavailable

Your contact center may use a feature that lets you enter a reason that you are unavailable (in Aux-work). If your contact center uses this feature, you can enter a reason or change the reason that you are unavailable. You will remain in Aux-work state even if you change the reason.

For example, you may be unavailable because you are in a training session. You select **InTraining** as the reason that you are unavailable. When you return from your training session, you may go on your break. You change the reason that you are unavailable to **OnBreak**.

To enter or change the reason you are unavailable:

1. While you are in Aux-work, right-click in the Status Control bar.
2. Select **Change Aux Reason** from the pop-up menu.
3. In the **Select reason code** dialog box, select the reason that you are not available.



4. Click **OK**.

Viewing Customer and Contact Information

When a contact arrives in the Avaya™ Interaction Center (Avaya IC) contact center, an electronic data unit (EDU) is created for that contact. The application then forwards the contact to an available agent, using the rules that have been set up by your system administrator.

The Avaya Agent on your desktop displays information about the currently active contacts that have been assigned to you. The task lists in the **Media** pane display the basic information about each contact. The Contact pane that is displayed near the bottom of the Avaya Agent contains two areas where you can immediately access more detailed information about a contact:

- The EDU Viewer displays detailed information about any active contacts, including the creation date and time.
- The Contact History Browser provides information about previous contacts with the same customer.

The Contact pane also contains two buttons:

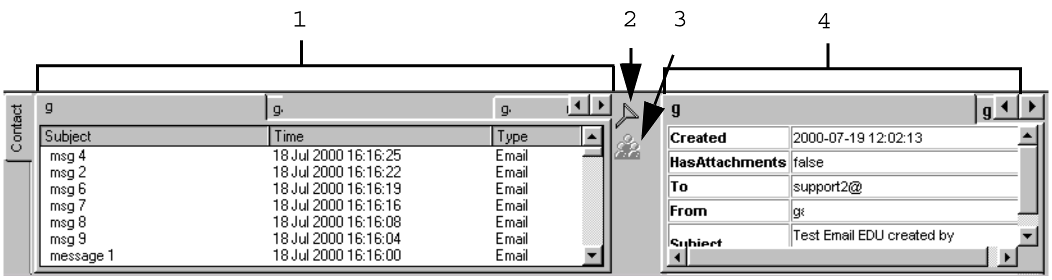
- The **Contact History Filter** button

- The **Active Contact Viewer** button becomes available only when another agent is currently handling an email contact with the same customer. The Active History Browser provides information about the other active email contact or contacts.

To view the information in the Contact pane, click a contact in the task list to bring it into focus.

For information about the Contact History Filter, see Filtering Contact History Information on page 60. For information about the Active Contact Viewer, see Using the Active Contact Viewer on page 58.

The following illustration shows the media task list;



1. **Contact History Browser**
2. **Contact History Filter button**
3. **Active Contact Viewer button**
4. **EDU Viewer**

Viewing Active Contact Information

You can use the EDU Viewer for most information about your active contacts. You may need to check the Active Email Viewer to see all active email contacts.

Using the EDU Viewer Information

When you select a contact in a task list, the EDU Viewer brings the tab containing information about the active contact to the front.

Using the Active Contact Viewer

Another agent may have deferred an email contact from a customer that you are handling by voice, email, or chat. The agent who has deferred the email plans to reply to the customer at a later time. The deferred email remains in the other agent's Email task list. Deferred emails are not displayed in the Contact History Browser because they have not been completed.

You can see information about the deferred email contacts in the Active Contact Viewer. For each active email contact from that customer in another agent's Email task list, the Active Contact Viewer displays:

- The date and time when the email contact was created
- Whether there are any attachments
- The contents of the **To** field
- How many times the email contact has been forwarded
- The sender's email address
- The subject line

If the customer has several active email contacts in the system, information about each contact is displayed in a separate tab.

To view information about a deferred email contact:

1. Double-click the new email contact to open it in your desktop and view information about that contact in the EDU Viewer.
2. Click the **Active Contact Viewer** button, which is located between the two boxes in the Contact pane.

   Note:

   If the button is disabled, there is no other active email contact from the customer in the contact center.

   If any deferred email contacts from this customer exist, the **Active Contact Viewer** dialog box opens and displays information about them.

Viewing Contact History Information

The Contact History Browser contains information about completed contacts that your current customer has had with the contact center. Contacts that have not yet been wrapped up are not listed.

The Contact History Browser contains a tab for each of your current contacts. Each tab contains the history of that contact, that is, the previous contacts the customer has had with the contact center. Avaya Agent automatically brings the tab for the active contact to the front of the Contact History Browser. To view information about another contact, click the appropriate tab.

Note:

Current information about an active customer contact does not appear in the Contact History Browser until you have wrapped up that contact.

In addition to the information that is visible in the Contact History Browser, you can double-click to see more details about previous email and chat contacts. The additional information available in the Contact History Browser is as follows:

- Voice contact – No additional information.
- Email contact – When you double-click, displays the **Email History** dialog box, which contains two tabs:
    - **Tracking History** tab, which provides a more detailed description of each contact
    - **Customer History** tab, which provides a detailed customer history and copies of emails this customer sent to the company in the recent past
- Chat contact – When you double-click, displays your Internet browser and displays a transcript of the previous chat session.

Clearing Current Contacts

You can clear the Contact History Browser of all the information that is currently displayed.

To clear contacts from the Contact History Browser:

1. Right-click in an empty part of the Avaya Agent.
2. Click **Contact History Browser - Reset** from the pop-up menu.
3. Click **OK**.

Filtering Contact History Information

If the current customer has a large number of contacts in the Contact History Browser, you can use the Contact History Filter to filter records before they are displayed. For example, if you click **Email** in the Media Type filter and enter May 1, 2003 and May 31, 2003 in the Time filter, the Contact History Browser displays only email contacts received from a customer in the month of May.

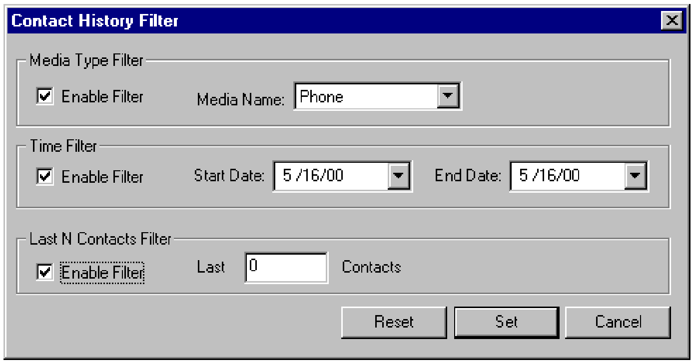
You can filter and display records by:

- Media type
- Date and time the contacts were received
- Last *x* contacts made by a customer (for example, the last five contacts)

To filter contacts in the Contact History Browser:

1. Click the **Contact History Filter** button. This is the top button between the two boxes of the Contact pane.

   The **Contact History Filter** dialog box is displayed.



2. Select the **Enable Filter** check box for the desired filter or filters.
3. Complete the required fields for the selected filter or filters, as follows:
   - **Media Type Filter** – Select **email**, **chat**, or **voice** from the **Media Name** list.

     If you want to view contacts of all media types, do not click this filter.
   - **Time Filter** – Click a start date and an end date.
   - **Last N Contacts Filter** – Enter a numerical value for the last number of contacts you want to view (for example, enter 10 to view the customer's last ten contacts).
4. Click **Set**.

Clearing Contact History Filters

To clear all contact history filters:

1. Click the **Contact History Filter** button.
2. In the **Contact History Filter** dialog box, click **Reset**.

Reloading Layouts in the EDU Viewer

The EDU Viewer displays details of the current contacts in your task lists.

If your administrator instructs you to clear all current contacts from the EDU Viewer or to reload updated layouts, you use options in a pop-up menu to do these tasks, as described in the following subsections

- Clearing Current Contacts in the EDU Viewer
- Reloading EDU Viewer Layouts

Clearing Current Contacts in the EDU Viewer

You use the **EDUViewer - Reset** command to clear all tabs of the EDU Viewer.

Note:
Only use the **EDUViewer - Reset** command if your administrator instructs you to do so.

To clear your current contacts:

1. Right-click in an empty part of the Avaya Agent.
2. Click **EDUViewer - Reset** from the menu.
3. Click **OK**.

Reloading EDU Viewer Layouts

You use the **EDUViewer - Reload Layouts** command to reload the EDU Viewer formats onto your desktop after your administrator has changed them.

Note:
Only use this command if your administrator instructs you to do so.

To reload the EDU Viewer formats:

1. Right-click an empty part of the Avaya Agent.
2. Click **EDU Viewer - Reload Layouts** from the menu.

   The revised templates are loaded onto your system.
3. Click **OK**.

Using the Unified Agent Directory

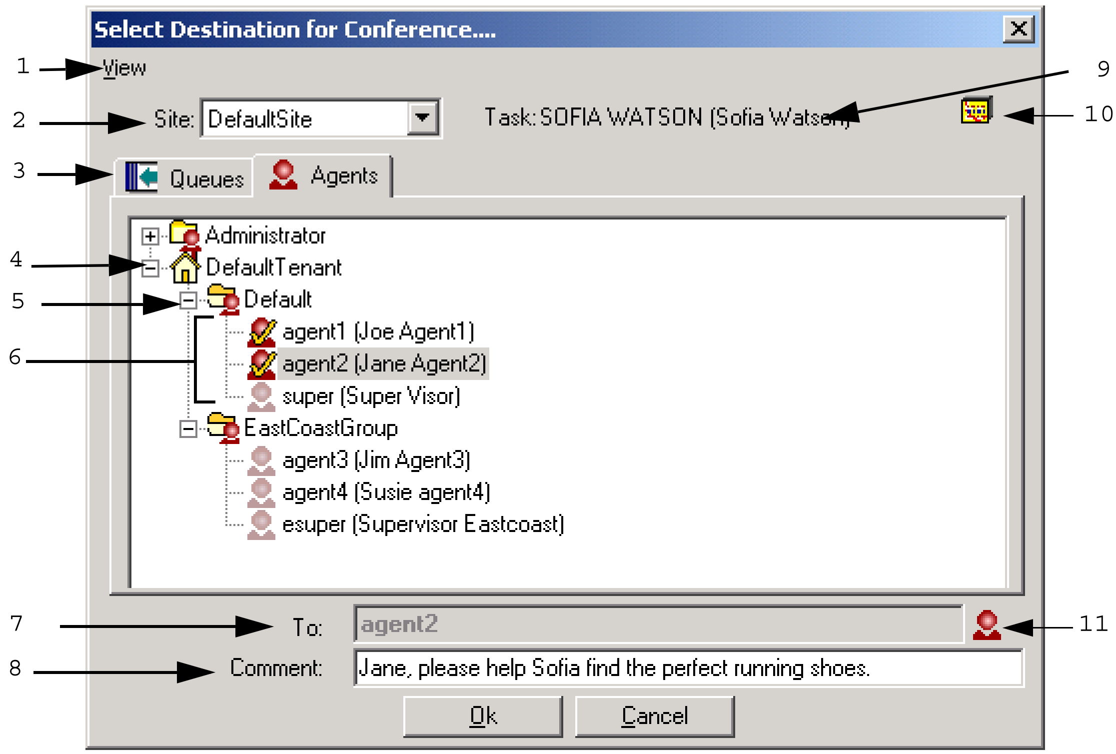
The Unified Agent Directory (UAD) is a directory full of information about resources in your contact center. Depending on the set-up at your company, the UAD may have the following tabs:

- **Queues** tab – The UAD always has a **Queues** tab. When this tab is selected, the UAD displays queues, which are groups of agents with certain similar skills or knowledge who handle a particular media type. The queues are used to route contacts to agents. For example, there may be email queues for Hardware Sales, Software Sales, Hardware Support, and Software Support, each containing agents who handle emails about a particular type of customer. Similarly, there may be voice queues or chat queues who handle particular types of customer.
- **Agents** tab – The UAD on your desktop may or may not have an **Agents** tab. If the tab is present, it contains lists with many items of information about the Avaya IC users in your contact center. This may include information about the following types of agents:
  - Administrators
  - Supervisors
  - External agents, who are people, usually outside of your company, who possess special knowledge or skills
  - Agents with particular skills, such as speaking other languages or knowing a particular operating system
- Tabs for individual workgroups – Your contact center may have set up workgroup tabs in the UAD. Each workgroup tab contains information only about agents in that workgroup. For each agent listed in the workgroup tab, only the agent's login name, display name, and primary email address are displayed.

You can use the UAD for the following purposes:

- Looking Up Queue and Agent Information on page 65
- Involving Other Agents in a Voice Contact on page 90
- Initiating a Voice Contact on page 94
- Sending an Email to an External Agent on page 110
- Transferring an Email Contact on page 112
- Originating an Outbound Email on page 124
- Involving Other Agents in a Chat Contact on page 152

An agent is using the UAD in the following illustration to transfer a chat contact to another agent:



1. **View menu**
2. **Site drop-down menu**
3. **Tabs. Agents tab is selected in this illustration.**
4. **IC Default tenant**
5. **IC Default workgroup**
6. **Agents in the Default workgroup. Agent states are indicated by the icon.**
7. **To field for destination of contact. With a voice contact, you can enter a phone number or queue manually.**
8. **Comment field where you can type a comment about this contact.**
9. **Active contact description**
10. **Active contact media type icon**
11. **Icon, which changes according to your previous action. A pencil indicates that you typed in the To field. A greyed out pencil indicates that there is no text in the To field. An Agent icon indicates that you selected an agent. An arrow indicates that you selected a queue.**

Looking Up Queue and Agent Information

Whether or not you are currently handling contacts, you can use the UAD to look up information about resources at your company. You may be able to find contact information, such as email addresses and phone numbers, of other agents, supervisors, external agents, or agents with particular skills.

This section explains how to look up information in the UAD, under the following topics:

- Looking Up Queues with the Queues Tab on page 65
- Looking Up Agents with the Agents Tab on page 66
- Looking Up Agents with the Find Option on page 70
- Filtering Data Displayed in UAD on page 68
- Updating UAD Information on page 74

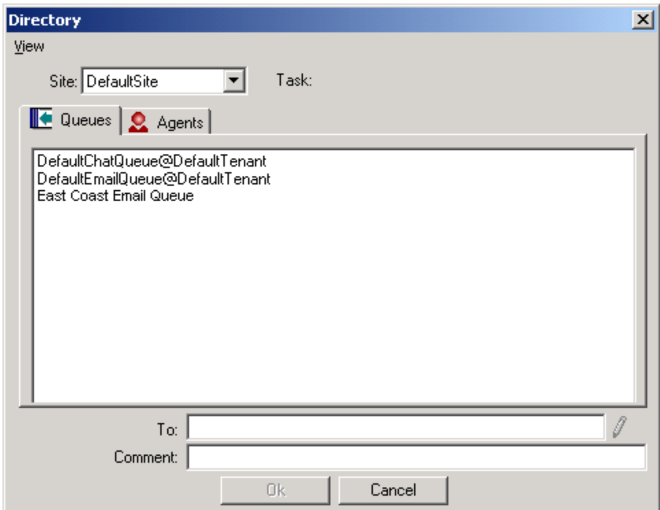
Looking Up Queues with the Queues Tab

The Avaya IC software routes incoming customer contacts to various queues. A queue is a group of agents with similar skills and knowledge assigned to handle specific types of customer contacts.For example, there may be a Hardware Sales queue, a Hardware Support queue, a Software Sales queue, and a Software Support queue, each containing agents who handle a particular type of customer.

The **Queues** tab of the UAD lists the queues that administrators at your contact center have set up in the database and marked for inclusion in the UAD (marked as "addressable"). Queues include agents enabled to handle a single media type (Voice, Email, or Chat) or the combination of Voice and Chat.

You use the **Queues** tab when you want to transfer a voice contact or email contact to a queue. The transfer will be assigned to the first available agent in that queue. (Chat is the exception. You cannot transfer a chat contact to a queue.) For information, see Involving Other Agents in a Voice Contact on page 90 or Transferring an Email Contact on page 112.

The following illustration shows the UAD open to the **Queues** tab when no contact has been selected.



By default, the **Queues** tab displays only the queues that handle the same media channels that you are currently handling.

To be sure that you have the latest information on queues, you should refresh the UAD before using the **Queues** tab. See Refreshing the Entire UAD on page 75.

Looking Up Agents with the Agents Tab

If your UAD has an **Agents** tab, you can use it to look up information about people who work for the contact center. You may find the following types of information about each person who is listed in the **Agents** tab:

- General agent information, such as last name, first name, login ID
- Telephone numbers, such as primary, secondary, mobile, pager, and fax
- Email addresses, such as internal and personal

If your UAD does not have an **Agents** tab or if you are looking for agents with particular skills, use the instructions in Looking Up Agents with the Find Option on page 70.

To look up agent information:

1. Right-click anywhere in the Avaya Agent **Media** pane.
2. Select **Show Directory** from the pop-up menu.

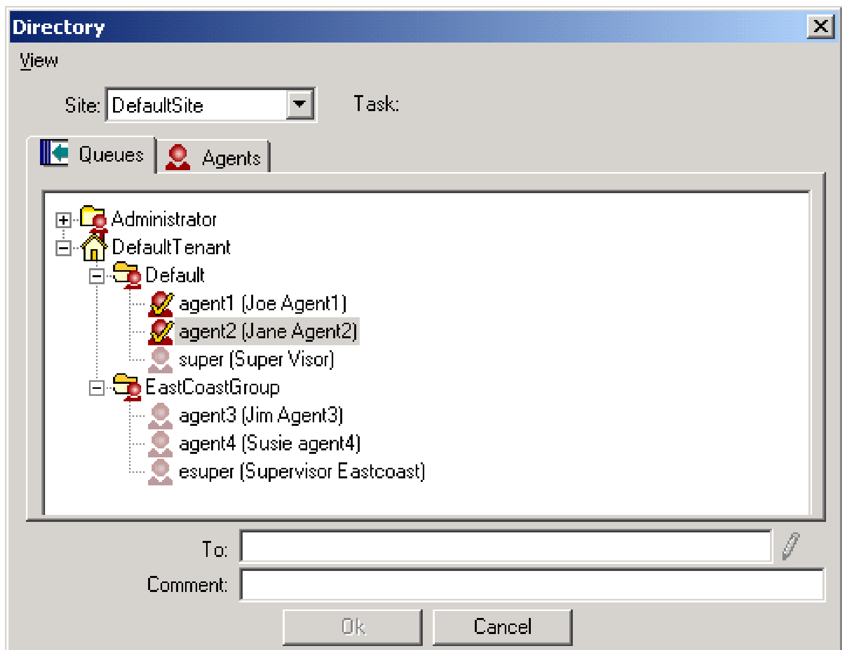
   The **Directory** dialog box (the UAD) is displayed.

3. Click the **Agents** tab (or any workgroup tab that you have containing agent information).

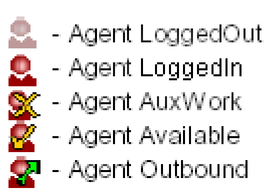
   The tenant and workgroups that you belong to, and the agents within these groups, are displayed in a tree structure, as shown in the following illustration. A house icon represents tenants and a folder icon represents a workgroup.

   Note:

   A tenant may be a company, such as XYZ Corp; a location, such as New York or Boston; or a workgroup, such as Sales or Support.



   A red icon of a person's head represents an agent. The appearance of the icon indicates information about an agent, as shown in the following illustration:

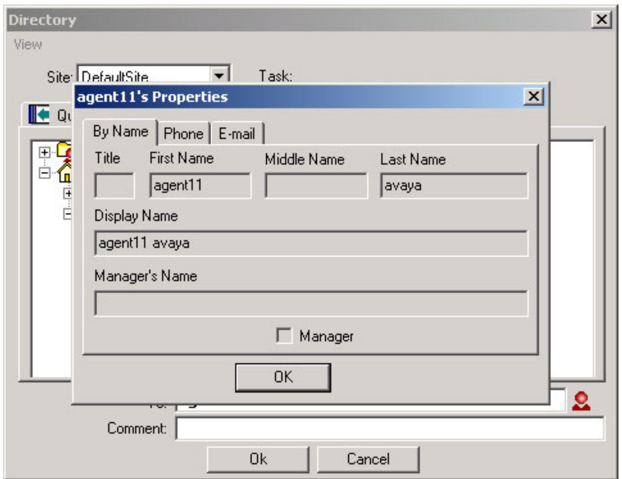


4. If the person you are looking for does not belong to this tenant or these workgroups, make an appropriate selection from the **Site** drop-down menu. If you are not certain which of these tenants and workgroups the person belongs to, select **All Sites**.

5. Navigate through the tree structure. Click the plus button (**+**) beside any tenant or workgroup to display its contents. Use the scroll bars as necessary to see more information.

6. When you find the name of a person you want information about, right-click the name and click **Properties**.

   The **Properties** dialog box is displayed for this person.



7. Click the appropriate tab in the **Properties** dialog box to find the desired information about this person.

   Tip:

   If you leave the UAD open for a while, the information may not be current. You can right-click a workgroup and select **Update State** to update the information in that workgroup. For more information, see Updating UAD Information on page 74.

Filtering Data Displayed in UAD

You can use the **Filter** dialog box to limit the information you see in the UAD. You can filter agents by the type of media agents handle, their agent type, and their current agent state.

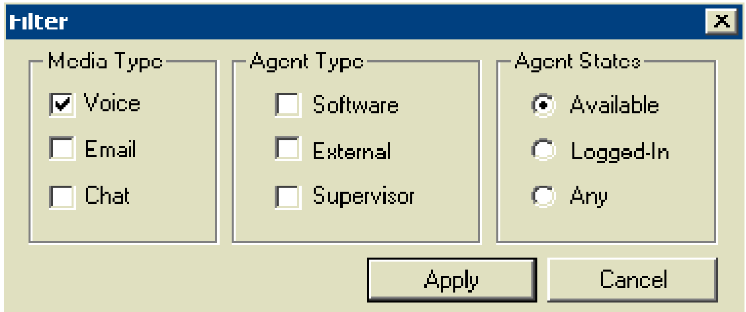
To filter queue or agent information:

1. Right-click anywhere in the Avaya Agent **Media** pane.
2. Select **Show Directory** from the pop-up menu.

   The **Directory** dialog box (the UAD) is displayed.

3. Select **View > Filter**.

   The **Filter** dialog box is displayed.



Note:

If you do not see a **Filter** option in the UAD's **View** menu, or if the **Filter** option is disabled, your contact center does not use this feature.

4. In the Media Type section of the **Filter** dialog box, select or de-select the types of media handled by agents that you will search for. You can select one, two, or all three types. If you do not select a media type, all media channels are included.
5. In the Agent Type section, select one or two of the following:
   a. **Software** if you want to search only for non-human resources like IVR queues.
   b. **External** if you want to search only for people who have been designated as external agents.
   c. **Supervisor** if you want to search only for supervisors.

Note:

External agents are people, usually outside of your company, who have been designated as external agents because of special knowledge or skills they possess.

6. In the Agent States section, *select only one* of the following agent states:
   a. **Available** includes only agents who are currently logged-in and available.
   b. **Logged-In** includes only agents who are logged-in (whether they are available or in Aux-work).
   c. **Any** includes all agents regardless of agent state (whether they are logged in and available, logged in and in Aux-work, or not logged in).
7. Click **Apply**.

   The tab is updated to display only the information you included in your selections.

Looking Up Agents with the Find Option

The **Find** option offers another method of looking up information about agents at your contact center. With this dialog box, you can search for agents in the following ways:

- **Media type** (Voice, Email, or Chat)
- **Agent type** (External, Supervisor, or Software)
- **Current agent state** (Available, Logged-In, or Any)
- **Skills** (such as knowledge of a language or an operating system, and skill proficiencies)
- **Personal information** (First Name, Last Name, and so on)

The **Find** option returns three pieces of information about each agent: login ID, display name, and media types that are enabled for the agent.

You can save the results of each search as a tab to be added to the UAD. The tab displays the results list of the **Find** dialog box, including agents' media types, login ID, display name, and email address. This can help you find an agent with a specific skill when you need one, such as an agent who is proficient in a specific language. For example, if you occasionally receive voice contacts from people who speak German, you could search for agents who speak German proficiently and who handle Voice. You would then save the results of your search as a tab which you can name "German."

Note that you can search for agents by agent state, but agent state changes regularly. If you want to be sure agent state is accurate, you may want to perform a new search.

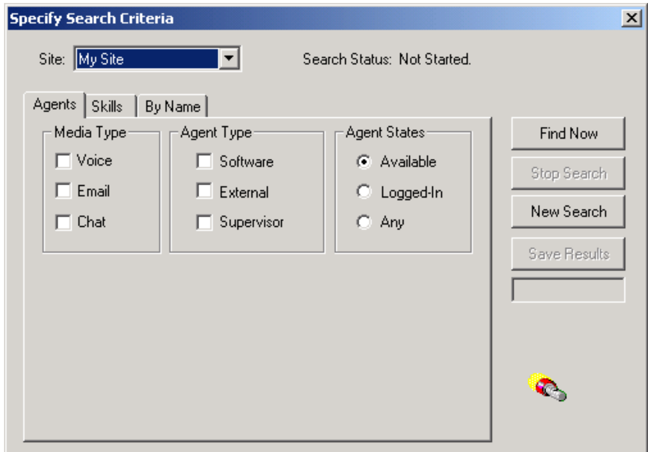
To look up agent information with the Find option:

1. Right-click anywhere in the Avaya Agent **Media** pane.
2. Select **Show Directory** from the pop-up menu.

   The **Directory** dialog box (the UAD) is displayed.

3. Select **View > Find**.

   The **Specify Search Criteria** dialog box is displayed.



Note:

If the **Find** option is disabled, your contact center does not use this feature.

4. From the **Site** drop-down menu, select the location that you want to include in the search.
5. Go to the appropriate step below for each tab you want to use for the search. Skip the steps about tabs you do not want to use.

Tip:

You can use any of the three tabs (**Agents**, **Skills**, or **By Name**) in the dialog box to select the criteria that will be used for the search. The tabs are cumulative. This means that when you click the **Find Now** button, the search will find only the agents that meet *all* the criteria you select in all the tabs.

6. **Agents** tab – Select all the criteria that you want to include in the search, as follows:

   a. In the Media Type section, if you want to look for agents who are enabled to handle a single media channel, select that media type. You can select one, two, or all three types. If you do not select any media type, the search will include all media channels.

   b. In the Agent Type section, select one or two of the following:

      i. **Software** if you want to search only for non-human resources like IVR queues.

      ii. **External** if you want to search only for people who have been designated as external agents.

      iii. **Supervisor** if you want to search only for supervisors.

c. In the Agent States section, select only one of the following:

   i. **Available** if you want to search only for agents who are currently available.

   ii. **Logged-In** if you want to search only for agents who are currently logged in (including those who are Available and those in Aux-work).

   iii. **Any** if you want to include all agents.

7. **Skills** tab – If you want to search for agents with certain skills, such as agents who speak certain languages or agents who support a certain operating system, click the **Skills** tab and do the following:

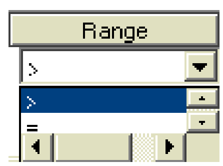
   a. If necessary, navigate through the folders.

   b. When you find the skill you want, double-click to select it.

   The selected skill moves to the bottom of the dialog box.

   c. You can select a range (**>** for greater than; **=** for equal to, or **<** for less than) and a **Proficiency** rating (**Expert**, **High**, **Low**, or **Medium**) to indicate the level of proficiency by clicking in the appropriate columns.

   For example, if you wanted to find an agent who speaks French well (greater than a Medium level of proficiency), you might select a Range of **>** and a **Proficiency** of **Medium**. You would first click the **Range** column to open the following menu:



   After selecting the range, you would click the **Proficiency** column and select the range.

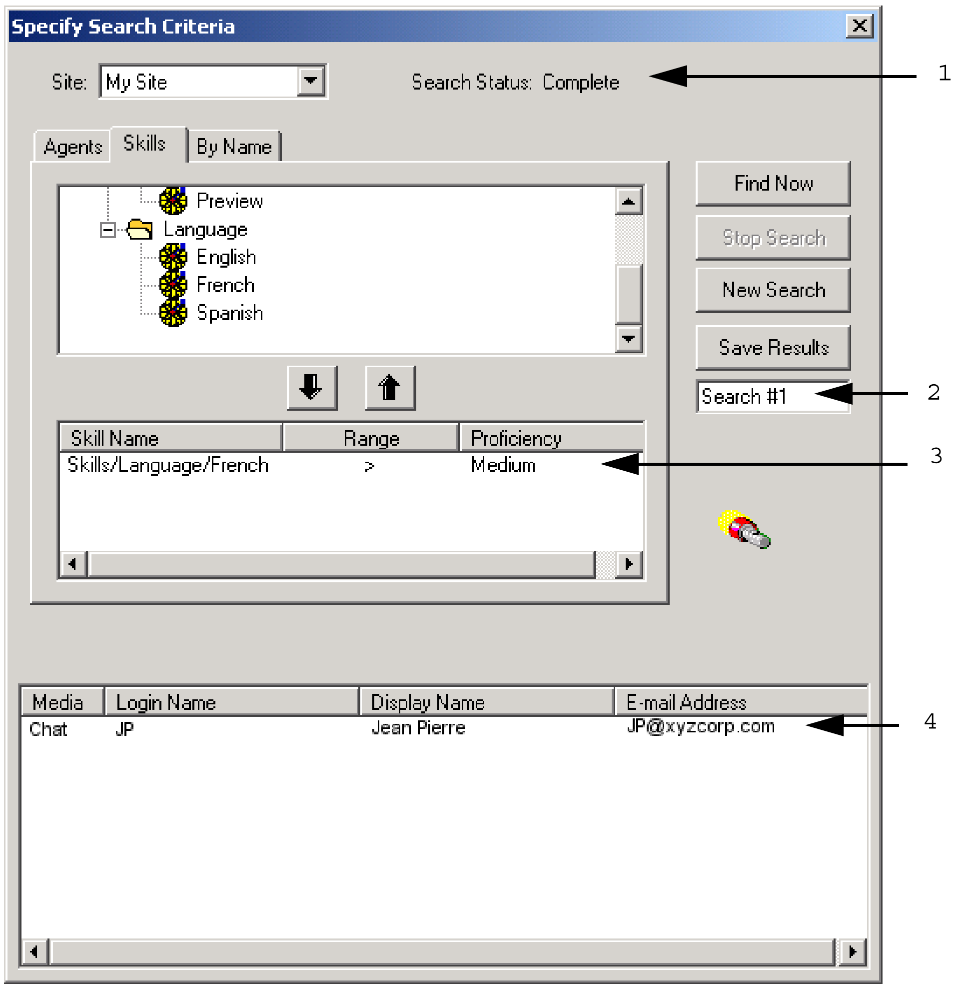
8. **By name** tab – If you want to find a specific person, click the **By name** tab and enter any information that you know about the person in the appropriate text box.

   Note:

   The information is case-sensitive. If a person's name is Bob, your search will not find him if you type **bob** instead of **Bob**.

9. Click **Find Now** whenever you have entered all the desired search criteria.

   When the search is complete, the dialog box expands to display your search results. The following illustration shows results of a search for chat agents who speak French.



1. Search Status.
2. Search Results text box giving the number of this search.
3. Skill that was searched for.
4. Information about the agent or agents that were found with this search.

10. Look at the results of the search at the bottom of the dialog box. If you think that the results will be useful another time, create a tab with this data, as follows:

    a. In the text box at the right side of the dialog box, where **Search #X** is displayed, select the text and type over it to create a name for the new tab.

b. Click **Save Results**.

A tab is added to the main screen of the UAD displaying the information found in the previous search.

11. If you did not get exactly the results you wanted, change any of your selections in the **Specify Search Criteria** dialog box as desired. Then click the **Find Now** button again.

CAUTION:

Use the **New Search** button only if you want to clear the previous search criteria and begin again.

12. If you want to save the results in a tab added to the main UAD dialog box, you should first rename the results in the **Search Results** text box so you will know what is displayed in the tab. Then click the **Save Results** button.

Deleting Search Results Tabs

If you saved information you found in the **Find** option, new tabs were created in the UAD with the results. You can delete any tabs that were created this way.

To remove search results tabs from the UAD:

1. Click the tab that you want to delete.
2. Select **View > Delete Search Results**.

   The tab is deleted.

Updating UAD Information

Information about queues and agents changes over time. For example, new queues or agents may be added or existing ones may be removed.

To be sure that the information you see in the UAD is current, you can refresh the UAD before using it.

You can either refresh the entire UAD or you can update agent states only. To be sure you get the latest information about queues, you must refresh the entire UAD.

If you want to be certain that the agent state information is current and your contact center does not update this information automatically, or if your UAD has been open for a while, you can update agent states only. If your contact center is large, it is faster to update agent states than to update the entire UAD.

Refreshing the Entire UAD

The information about queues and agents may have changed since you logged in. To be sure that you have the latest information on both queues and agents, you can update all UAD data. It may take a while to refresh the entire UAD.

To update all data displayed in the UAD:

- Select **View > Refresh**.

  The UAD brings in all the latest information.

Updating Agent State Only

The information in the UAD about agents may not be current if your UAD has been open for a while or if your administrators have turned off automatic updates of agent state data.

You can update the agent state of agents in a single workgroup. It is faster to update the agent state in one workgroup than to update the entire UAD.

To update agent state data in members of a group:

1. Right-click the name of a workgroup.
2. Select **Update State** from the pop-up menu.

   The latest agent state information for members of this workgroup is displayed.
3. Repeat with other workgroups, as desired.

Using Screen Pops

If your contact center has set them up, you may see screen pops, like the one in the following illustration, when new incoming contacts arrive in your task lists. If you click **Yes** in a screen pop, the new contact becomes active. If your contact center includes an agent desktop application that is integrated with Avaya Agent, information about that contact is automatically imported into that application.

If you are already responding to a contact when the new contact arrives, and you click **No** in the screen pop, Avaya Agent does not display a second screen pop because the new screen pop may interrupt your current contact. You can manually display a screen pop for the second contact through the pop-up menu in the Avaya Agent **Media** pane.

Note:

Depending on how your administrator configured your system, you may not see screen pops.

To perform a manual screen pop for an incoming contact:

1. Click the new contact to make it active.
2. Right-click in any open area of the Avaya Agent.
3. Click **Screen Pop** in the pop-up menu.

   Avaya Agent opens the integrated agent desktop application with customer information about the incoming contact.

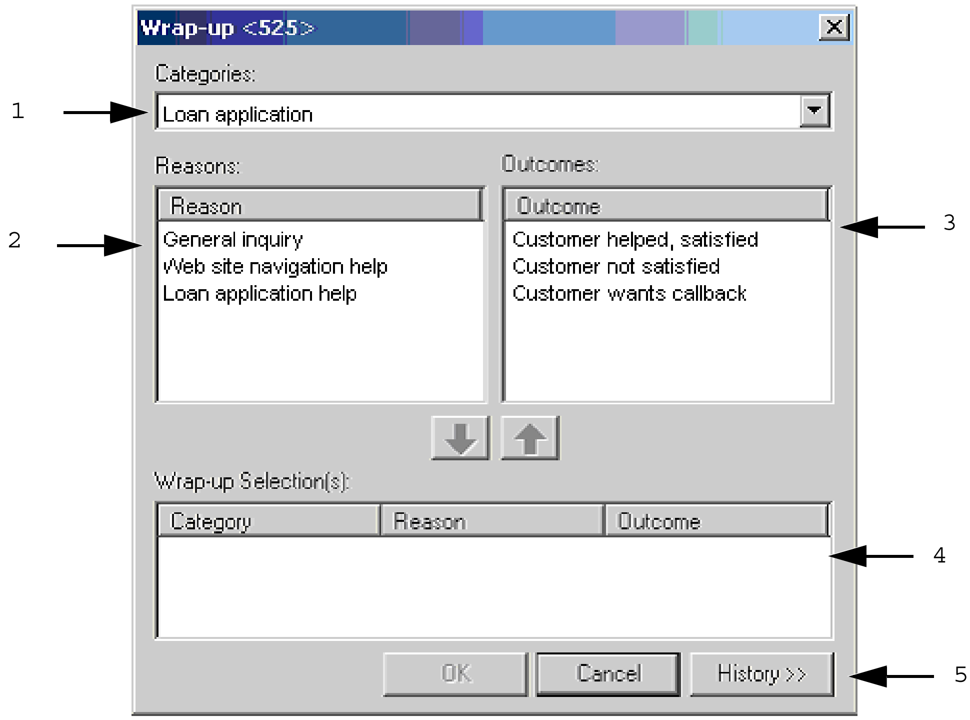
Wrapping Up Contacts

After you complete an incoming voice, email, or chat contact or an Outbound Contact call, your contact center may require you to wrap up the contact or call by entering information in a **Wrap-up** dialog box or a Prompter script. The information you enter is added to the contact information in the database to assist the next agent who handles a contact from that customer. Because each contact center handles wrap-up information differently, your system administrator determines the following:

- Whether you are automatically placed in the WrapUp state after completing a contact
- Whether you enter information in a dialog box or click buttons in a script to enter customer and contact information
- Whether you must record wrap-up information for every contact

Using the Wrap-up Dialog Box

Most contact centers document the reason and outcome of customer contacts through the **Wrap-up** dialog box, like the one shown in the following illustration.



1. **Categories drop-down menu**
2. **Reasons**
3. **Outcomes**
4. **Wrap-up Selection(s)**
5. **History button**

When you wrap up a voice, email, or chat contact, you may need to select information from one or more of the following areas of the **Wrap-up** dialog box:

- **Categories** – You may see a category for each of the media channels in this drop-down menu. Of you may see another type of grouping of a set of reasons for the contact (for example, Balance Inquiry or Cancellation Request).
- **Reasons** – Items that specify the purpose of a customer's contact or the intent of the work you performed.
- **Outcomes** – This information specifies the action you took or the result of your activity.

The Wrap-up Selection(s) area is for the items that you select from the Reasons and Outcomes areas, or whatever areas you have in your **Wrap-up** dialog box.

The **Wrap-up** dialog box may also have a **History** button that displays the following information about previous contacts with this customer:

- The login ID of the agent who entered the wrap-up information
- The name of the agent who entered the wrap-up information
- A description of the category, reason, or outcome selected by the agent who wrapped up the contact

To wrap up a contact using the Wrap-up dialog box:

1. Complete your voice conversation, chat session, or email with the customer, using the **Hangup** button for a voice contact, or the **Wrap** button for an email or a chat session. With an email, you may not need to use the **Wrap** button.

   The **Wrap-up** dialog box opens automatically.
2. Select the appropriate item from the **Categories** drop-down list.
3. Select the appropriate items in the **Reasons** list and the **Outcomes** list, or whatever lists you see.

   Note:

   If your Avaya Agent contains two or more lists, you may need to choose from all available lists before you can add the entries to the **Wrap-up Selection(s)** list.
4. Click the down arrow button to add the items you selected to the **Wrap-up Selection(s)** list.

   Note:

   If you need to de-select an item that you added to the **Wrap-up Selection(s)** list, select the item, click the up arrow button, and click **OK**.
5. Click **OK**.
6. If a dialog box asks you to confirm that you want to wrap the contact, click **Yes**.

Using a WrapUp Prompter Script

If your system is configured for a WrapUp Prompter script, the script is displayed in the Prompter pane when you wrap up a contact.

The WrapUp Prompter script contains a series of questions about contacts specifically designed by your company. You proceed through the script by clicking radio buttons, selecting check boxes, or typing text in fields to provide information about the contact. Generally, the answers to the script questions require you to select reason, category, and outcome information, similar to the information fields in the **Wrap-up** dialog box (see Using the Wrap-up Dialog Box on page 77).

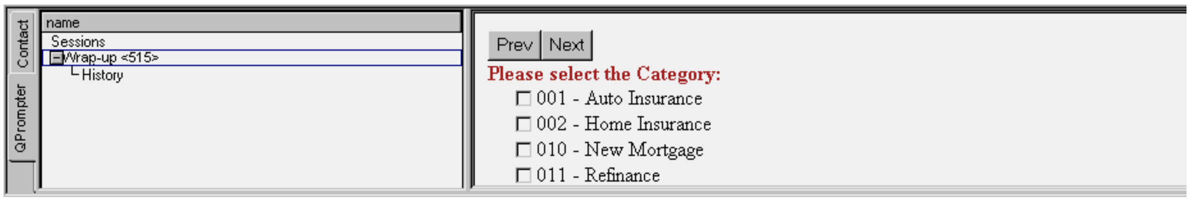
To wrap up a contact using the WrapUp Prompter script:

1. Click the **Hangup** button to complete the voice contact.

   You automatically enter the WrapUp state, and the WrapUp Prompter script opens in the Prompter tab of the Contact pane.

2. If necessary, click the Prompter tab to bring it to the foreground of the Contact pane.

   Follow the script, selecting or entering the appropriate information. The following illustration shows a Prompter script. Your script may not resemble this example.



Chapter 3: Managing Inbound Voice Contacts

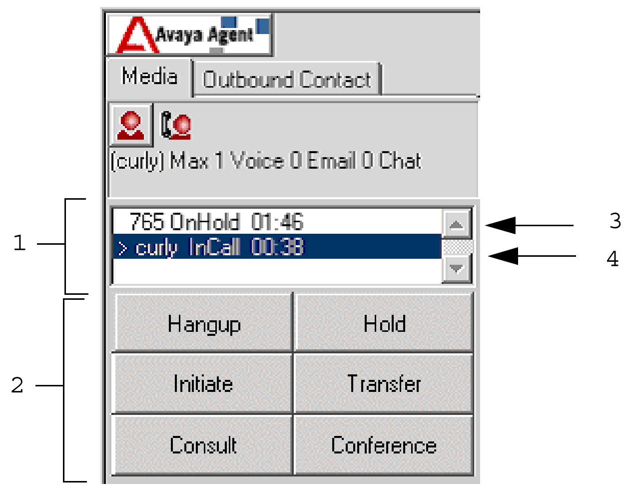
This chapter provides step-by-step instructions on using Avaya™ Computer Telephony for IC to manage your inbound voice contacts.

When customers make telephone calls that come in to the contact center, their calls are routed by the Avaya™ Interaction Center (Avaya IC) software to agents who are available to handle voice contacts. Voice contacts that are routed to you are displayed in your Phone task list.

This chapter includes the following topics:

Using the Phone Task List and Softphone

When your contact center application forwards a voice contact to your desktop, the contact is displayed in the Phone task list, which is located in the Softphone interface, as shown in the following illustration:



1. **Phone task list**
2. **Softphone buttons**
3. **On Hold voice contact**
4. **Active voice contact**

The Phone task list displays information about all voice contacts you are currently handling. Each entry in your Phone task list corresponds to a different voice contact.

The information about each contact that is displayed in your Phone task list depends on the telephone switch used by your contact center. The Phone task list can display the following information about each contact:

- Customer Number – The number displayed depends on whether the call is an inbound or outbound call, and what information exists in the call record. If the call is:
  - inbound, the display will show the primary ANI (Automatic Number Identification) associated with the call. If that information is not available, it will show the ANI associated with the call.
  - outbound, the display will show the number that was dialed. If that information is not available, the display will show the primary DNIS (Dialed Number Identification Service). If that information is not available, the display will show the DNIS.
- Call ID – Number that identifies the contact to the software.

- Call State – State of the contact (such as Ringing, Ready, Busy, OnHold, InCall, WrapUp)

  Note:

  Your contact center may use different terms to describe call states. For example, Ready may be known as Available. Busy may be known as Auxiliary Work or Idle. The WrapUp state may be known as After Call Work.

- Time-in-call – The period of time that you have been on the call with the customer in minutes and seconds.

  Tip:

  If you select a contact and hold your mouse over it for a moment, you will see a "tooltip" with some of the same information about the contact. This tooltip may be easier to read than the information within the task list and it may contain additional information.

The status of a new contact in the task list before you answer the call is Ringing. You double-click the contact to answer the call (unless you are using Auto Answer, which answers the call for you). Then you begin talking.

An open angle bracket (>) indicates the active voice contact. This is the customer you are currently handling. All buttons that you click apply to the active contact.

Blue highlighting indicates the selected contact. The selected contact may or may not be the active contact.

Using the Softphone Buttons

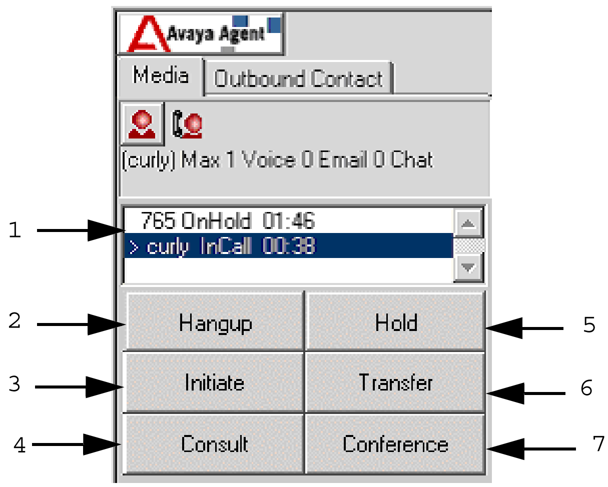
You use the Softphone buttons to control the active voice contact. All Softphone buttons affect the active contact. For example, if you click the **Hangup** button, the system hangs up the active voice contact, but any other contacts in your Phone task list remain.

If you receive a second voice contact while you are still handling your first voice contact, you can select the second voice contact by clicking it one time. This selects the contact without answering the telephone call. It allows you to see information about the second contact in the EDU Viewer or Contact History Browser while you are still engaged with your first contact. A selected contact is highlighted in blue in the task list.

If you double-click the second voice contact, it becomes the active contact, while the first contact is put on hold. You should tell your first customer that you will put them on hold before you double-click a second voice contact.

If you have any problems with your Phone task list or with Softphone, see Inbound Voice Problems on page 223.

The out-of-the-box Softphone interface in the **Media** pane is shown in the following illustration. Your Softphone may resemble the following illustration, or it may have a different set of buttons.



1. **Active voice contact**
2. **Hangup button (Changes to Answer)**
3. **Initiate button**
4. **Consult button**
5. **Hold button (Changes to Reconnect)**
6. **Transfer button**
7. **Conference button**

With the telephony buttons, you can perform various Softphone functions. These buttons can include:

- **Answer** or **Hangup**
- **Hold** or **Reconnect**
- **Initiate**
- **Transfer**
- **Consult**
- **Conference**
- **Ready**
- **Busy**

Telephony buttons are either available or unavailable to you, depending on the current state of the active voice contact and on your agent state. For example, the **Hold** and **Hangup** buttons are available only if the active voice contact is in an InCall state. If it is not in an InCall state, the **Hangup** button is disabled (greyed out), and the **Hold** button is either disabled or replaced by the **Reconnect** button.

Using the Softphone Menu

With the Softphone component of Avaya Agent, you can perform standard telephone functions without a physical telephone. The Softphone menu is part of the Avaya Agent pop-up menu. You see this menu if you right-click (use the right mouse button to click) any blank section of Avaya Agent. The pop-up menu contains the following menu options:

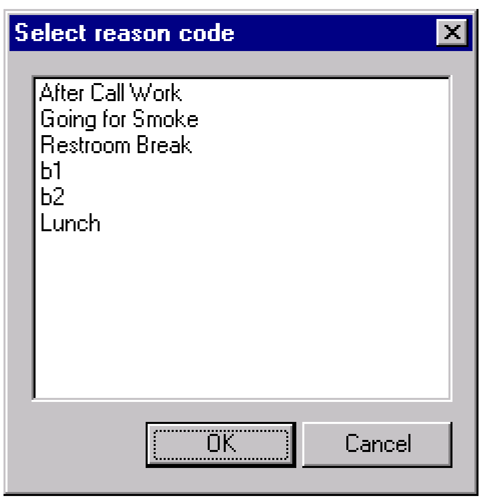
- **Softphone - Login/Logout**
- **Softphone - Reset**

For information on logging in and out of Softphone, see Logging In and Out of Media Channels on page 45.

Using Softphone to Set a Reason for Being Unavailable

Depending on how your site is configured, you may see a dialog box whenever you log out or click the **Busy** button on the Softphone.

In this dialog box, you must select a reason before you can log out or set your telephone to the Busy state.



To select a reason:

1. Click the desired reason to select it.
2. If you want to clear the dialog box and select a different reason, click the **Cancel** button.
3. Click **OK**.

Using Softphone with DEFINITY Switches

If your Softphone system uses an Avaya™ DEFINITY telephone switch, you may need to do the following tasks:

- Sending Numerical Information with DTMF
- Using the Auto-In Work Mode

Sending Numerical Information with DTMF

If your Softphone uses a DEFINITY telephone switch, your administrator may have implemented DTMF. You use DTMF to enter numerical information, such as a customer's account or identification number, on the numeric keypad of the **Dial Pad** dialog box. DTMF sends this numerical information to a selected device, such as an Interactive Voice Response (IVR) unit, as if you had dialed the tones on your telephone.

To send numerical information with DTMF:

1. In Avaya Agent, click the **DTMF** button.
2. In the **Dial Pad** dialog box, enter the numbers in either of the following ways:
   - Click in the entry field. Then type the digits on your keyboard.

     OR
   - Click the numeric buttons in the keypad window.

   If you type an incorrect number, click the **CE** (Clear Entry) button to clear one number at a time or click the **Clear** button to completely clear everything that is displayed.
3. Click the **Send** button to transmit the number across the telephone line.

Using the Auto-In Work Mode

This section applies to you only if you are using a DEFINITY telephone switch and you can set the Auto-In and Manual-In work modes. You can set these work modes by pressing buttons on your telephone, by entering codes on your telephone, or by using Softphone. The work modes have been set up at your contact center to correspond to agent states in specified ways.

The Auto-In work mode automatically assigns you to specific Automatic Call Distributor (ACD) queues. It makes you available immediately after the end of a call. Therefore, with Auto-In, you may get another call as soon as you hang up.

If you plan to take a break after your current call while in Auto-In mode, you can change your work mode or agent state while on the call. The operation does not take effect, however, until you complete the call. For example, while on a call, you can click the **Agent** button in the Avaya Agent to change your agent state to Aux-work. The button will turn grey and remain grey as long as you remain in the call. As soon as you complete the call, your state will change to Aux-work and the **Agent** button will turn red.

In Auto-In mode, you cannot preset the Softphone while in a call to change from a Busy telephone state to an Available telephone state. You must reset the Softphone to change to and from the Aux-work state. See Softphone Stops Responding on page 226.

Be aware of the following issues when using Auto-In mode:

- You should not use this mode when you are handling outbound calls.
- If you are logged in to email or chat, you should log out of those media before using Auto-In.
- Presets from your physical telephone while your voice contact is in the InCall state do not work.
- If your Avaya Agent is not configured for wrap-up, you cannot set a WrapUp preset on your physical telephone while in automatic mode. (For an explanation of automatic and manual modes, see Changing State Across All Media Channels on page 53.)
- Other buttons you push on your physical telephone while wrapping up in automatic mode may not work.
- If your system uses the **Wrap-up** dialog box and you press the **AutoIn** and **ManualIn** buttons, a voice contact may be assigned to you while you are handling another call. You will see a **Wrap-up** dialog box for the first call after it ends, but a second call may arrive before wrap-up is complete. This will not happen on subsequent calls.

The following table shows how your agent state changes when you press a telephone button in either manual or automatic mode.

Initial Agent State	Phone Button Pushed	Changed Agent State
Available	AutoIn ManualIn AfterCall AuxWork	No change No change Voice channel changes to busy Aux-work
Aux-work	AutoIn ManualIn AfterCall AuxWork	Available Available No change No change
Init aux-work	AutoIn ManualIn AfterCall AuxWork	For all buttons: No Change / Aux-work at the end of the call
Outbound	AutoIn ManualIn AfterCall AuxWork	Available Available No change Aux-work

Handling a Basic Voice Contact

This section explains how to handle a basic incoming voice contact, under the following topics:

- Handling Contacts With Auto Answer
- Handling Contacts Without Auto Answer
- Placing a Voice Contact on Hold
- Involving Other Agents in a Voice Contact

Handling Contacts With Auto Answer

If you have Auto Answer turned on, Softphone automatically answers an incoming voice contact and makes that your active contact. Softphone does the following:

- Answers the voice contact.
- Makes it the active contact.
- Highlights the contact in the list and adds an open angle bracket (>) to help you identify this as the active contact.
- Changes the contact's status in the Phone task list to InCall.

To answer a new voice contact with Auto Answer turned on:

1. Begin speaking with the customer.
2. When you have finished the call, click the **Hangup** button in Softphone.

Handling Contacts Without Auto Answer

If you do not have Auto Answer turned on, follow this procedure.

To answer a new Softphone contact:

1. Double-click the new voice contact in the Phone task list.
2. Begin speaking with the customer.
3. When you have finished the call, click the **Hangup** button in Softphone.

Note:

If you see **CTI - Server Failure** in the Phone task list, contact your administrator.

Placing a Voice Contact on Hold

You can place a voice contact on hold while you look up information, answer another contact, or transfer the voice contact to another agent. The contact's status in the Phone task list changes to On Hold.

A button in Softphone changes its label between **Hold** and **Reconnect**. When you click the **Hold** button, the label changes to **Reconnect**. When you click the **Reconnect** button, the label changes to **Hold**.

Note:

If you are using an Aspect switch, you cannot use the **Hold** and **Reconnect** buttons. Instead, to put a current voice contact on hold and connect to a new voice contact, double-click the new contact. To reconnect to the first voice contact and put the second contact on hold, double-click the first contact.

To place a customer on hold while you speak to another customer:

1. Ask the customer with whom you are speaking if you may put them on hold for a moment.
2. Click the **Hold** button.
3. Double-click the new voice contact in the Phone task list.
4. Begin speaking with the second customer.
5. Return to the first customer as soon as possible, as follows:
   a. Either finish the call with the second customer or tell that customer you will put them on hold.
   b. Click **Hold** if you did not finish the call with the second customer.
   c. Select the first voice contact in the Phone task list.
   d. Click **Reconnect**.
   e. Continue your conversation with the first customer.
6. If the second customer is on hold, return to that customer as soon as possible.

For more complete information on handling two simultaneous telephone calls, see Example: Handling Two Voice Contacts on page 96.

Involving Other Agents in a Voice Contact

At certain times, you might want to have other agents help you with a customer to whom you are speaking. You can do so using the following Softphone buttons:

- **Transfer** – Transfers the call and removes the voice contact from your Phone task list immediately. You will not be able to speak to the customer after you complete the transfer. The call waits in a queue until it is connected to an agent.
- **Conference** – Transfers the call to another agent while you remain on the call, and lets you, or the other agent, add more agents to the call as well.
- **Consult** – Places the customer on hold and connects you to the other agent so that the two of you can talk privately before the call is actually transferred. Once you are done consulting with the agent, the call is transferred and the contact is removed from your

Phone task list. You will not be able to speak to the customer after you complete the consult.

You can also transfer the voice contact to a queue if you prefer. The system routes the transfer to anyone currently available in that queue. You may also be able to transfer a voice contact to an individual agent.

Tip:

If you want to transfer a contact to someone with a particular skill, first use the **Find** option to get the skilled person's contact information, as described in Looking Up Agents with the Find Option on page 70. Then return to this section to transfer the contact to that agent.

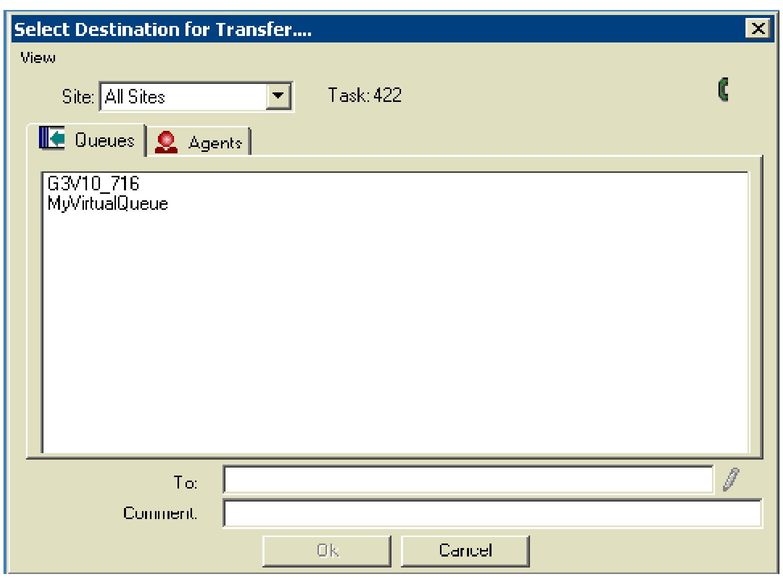
Note:

For information on transferring an Outbound Contact call, see Transferring, Conferencing, and Consulting an Outbound Contact Call on page 207.

To transfer a voice contact to a queue or an agent:

1. Tell the customer that you are going to transfer them to someone who will help them.
2. Click the **Transfer**, **Conference**, or **Consult** button on the Softphone, according to the type of transfer you want to do, as described above.

   The **Select Destination for <Transfer, Conference, or Consult>** dialog box is displayed, depending on which button you clicked. The following illustration shows the **Select Destination for Transfer** dialog box.



3. If you want to transfer the contact to the first available agent in a queue, leave the **Queues** tab selected. If you want to transfer the call to an agent, select the **Agents** tab or other appropriate tab.

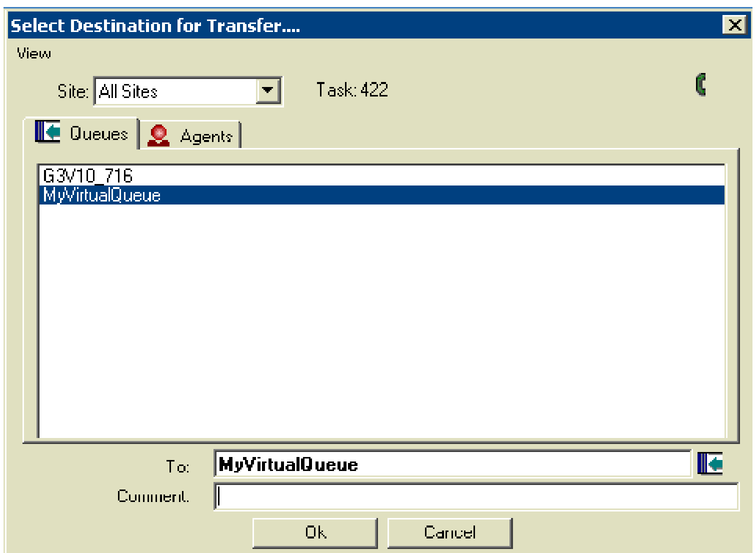
4. If the queue or agent to whom you want to transfer the contact is located at a different site, select that site from the **Site** drop-down menu. Select **All Sites** if you do not know where the queue or agent is located.

   Tip:

   If you are certain you know the telephone number of an agent to whom you want to transfer the contact, you can enter the number in the **To** field, and then skip to Step 6 in this procedure.

5. Find and select the queue or agent who will receive this transfer. If you need help finding an agent, see Looking Up Agents with the Agents Tab on page 66.

   The queue name or agent name is placed in the **To** field when you select it. In the following illustration, a queue has been selected.

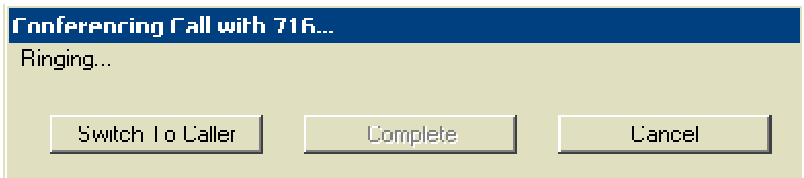


6. If you want to send a message to the agent who will receive the contact, put your cursor in the **Comment** field and type the message.

   The agent will see your message in the EDU Viewer.

7. Click **Ok**, or press Enter when your cursor is in either the Comment or To field.

   If you selected another agent, the **<Transferring, Conferencing, or Consulting> Call with < telephone number>** dialog box is displayed.

   Watch the status of the transfer that is displayed in the dialog box. In the illustration above, the status is **Ringing**. This indicates that the other agent's telephone is ringing.

   If you are doing a Transfer, that is, you clicked the **Transfer** button in Step 2, the dialog box disappears when the agent answers the telephone. A **Wrap-up** dialog box may then appear for you to wrap up the contact.

   If you are doing a Consult or a Conference, the dialog box status changes from **Ringing** to **In Call** when the agent answers the telephone. The dialog box contains buttons that let you switch between talking to the other agent and talking to the caller (the customer). The dialog box will remain on your screen until you click the **Complete** button.

8. If you are doing a Consult or a Conference, begin speaking to the other agent when the status in the dialog box changes to **Connected to Destination** and the button changes to **Switch to Caller**. Tell the agent about the customer's question or problem.

9. Click **Switch to Caller** when you are ready to speak to the customer.

   When you are connected to the customer, the status changes to **Connected to Caller** and the button changes to **Switch to Destination**. You can click that button to speak to the agent again.

10. If you are doing a Conference, add other agents to the call.

11. Whenever you want, you can complete your part of the Consult or Conference. Say good-bye to the customer and agents, and click the **Complete** button in the dialog box.

    Note:

    If you see the **Wrap-up** dialog box or a Prompter script, wrap up the voice contact as usual.

Initiating a Voice Contact

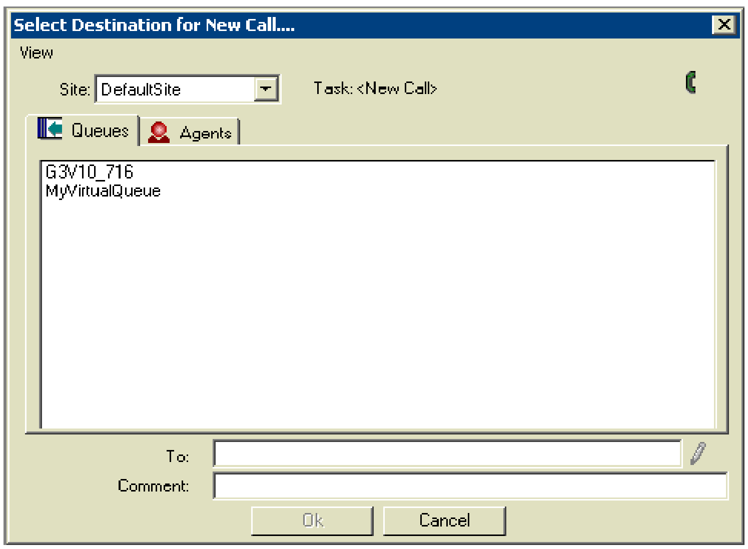
If you are enabled for voice contacts, you can use your contact center telephones to make a voice contact. You can use the UAD's **Select Destination** dialog box to find the telephone number of another agent, supervisor, or external agent who works for your company.

Note:

If you are looking for information about making outbound calls as part of your job duties, see Handling Outbound Contact Calls on page 193 or Managing Outbound Lists on page 215.

To initiate a call:

1. Click the **Initiate** button on the Avaya Agent Softphone to open the **Select Destination for New Call** dialog box.



Tip:

If you know the telephone number of the person you want to call, you can enter that number in the **To** field at the bottom of the UAD. Then skip to Step 9 of this procedure.

2. If you want to call the first available agent in a queue, click the queue in the **Queues** tab.

   The name of the queue moves to the **To** field.

   a. If you want, write a comment in the **Comment** field for the agent who will receive your call. The agent will see your comment in the EDU Viewer.

b. Click **Ok**.

A dialog box informs you that you are being connected.

c. When you hear the other agent, begin speaking.

d. When you are finished speaking, click the Softphone **Hangup** button.

3. If you want to call a specific agent, and there is an **Agents** tab on the UAD, click on that. If you do not see an **Agents** tab, search for the person as described in Looking Up Agents with the Find Option on page 70 or Filtering Data Displayed in UAD on page 68.
4. If the person is not located in your site, select the name of the site from the Site drop-down menu. If you do not know where the person is located, select All Sites.
5. Navigate through the tree structure in the scroll box on the left. Click any tenant or workgroup to display the agents in that tenant or workgroup. Use the scroll bar as necessary.
6. When you see the name of the person you want to call, you may want to check that this is the correct person. To do so:

   a. Right-click the name and click **Properties** in the pop-up menu.

   b. Click the **Phone** and **Email** tabs of the dialog box as necessary so you can check that this is the person you want to call.

   c. Click **OK** to return to the previous dialog box.

7. When you find the correct name, click the name once to move it to the scroll box at the bottom.

   Tip:

   You can double-click the name instead, if you want to connect the call immediately.

8. If you want, write a note to the agent in the **Comment** field. Comments are displayed in the agent's EDU Viewer.
9. Click **OK**.

   A dialog box informs you that you are being connected.

10. When you hear the other agent, begin speaking.
11. When you are finished speaking, click the Softphone **Hangup** button.

Example: Handling Two Voice Contacts

With Softphone, you can handle more than one incoming voice contact at the same time, using either the telephony buttons or keyboard shortcuts. By following this example, you can take two incoming voice contacts using the Softphone telephony buttons.

In the following example, a voice contact comes into the contact center. Your Softphone is in the Ready state. Avaya IC routes the voice contact to you. Your Phone task list displays the caller's telephone number and the contact's status as Ringing.

To answer two simultaneous voice contacts:

1. If Auto Answer is not turned on, double-click the contact to answer it manually.
2. Ask for information from the customer, who is following up on a previous contact. Use the Contact History Browser to look up the record on the previous contact.

   While you are looking up the customer's history, another voice contact is assigned to you.
3. Click the **Hold** button to place the first voice contact on hold so that you can answer the second voice contact.
4. Double-click the new incoming voice contact to answer it.
5. Click the **Hold** button to place the second voice contact on hold while you complete the first voice contact.
6. To return to the first voice contact, select it in the Phone task list. Then click the **Reconnect** button.
7. When you have completed the first voice contact, click the **Hangup** button.
8. If your company requires you to enter wrap-up information for each contact, you enter the WrapUp state, and the **Wrap-up** dialog box is displayed. Select the reason and click **OK**.

   When you complete WrapUp, this information is entered into the customer's record. (For more information about wrapping up contacts, see Wrapping Up Contacts on page 76.)
9. Click the second voice contact in the Phone task list to make it the active contact. Click the **Reconnect** button to speak to the customer.
10. If you do not have the information the customer needs, click the **Transfer** or **Consult** button to transfer the second voice contact to another agent (see Involving Other Agents in a Voice Contact on page 90).

Chapter 4: Managing Email Contacts

If your account is enabled for Email Management, you use the Web Agent to interact with customers by email.

Some customers send email from the company's Web site while others send it from a corporate or personal mail account. The email is routed by the Avaya™ Interaction Center (Avaya IC) software to agents who are available to handle email. Email contacts that are routed to you are displayed in your Email task list.

This section contains the following topics:

- Being Alerted to a New Email Contact
- Using the Email Task List
- Viewing Email History
- Composing a Normal Email Reply
- Addressing Emails with the UAD
- Using Resources in Email
- Using Suggested Responses
- Sending an Email to an External Agent
- Transferring an Email Contact
- Deferring an Email
- Saving a Draft
- Forwarding an Email
- Spell Checking Your Emails
- Requesting More Information from Customer
- Responding to an Email Alert
- Resolving an Email
- Originating an Outbound Email
- Approving or Rejecting an Email
- Handling a Rejected Email

Being Alerted to a New Email Contact

Email that customers send from the company Web site may be routed to you whenever you are available for email.

Depending on how the Avaya IC software has been set up at your contact center, you may be alerted to an incoming email in two ways:

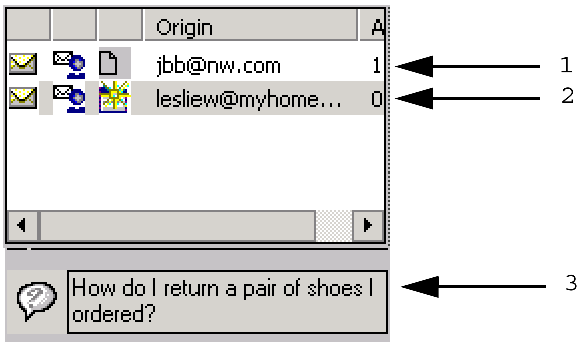
- By a sound. For information on changing the way that you are alerted, see Setting Preferences on page 180.
- By a screen pop. This is a dialog box that asks if you want to suspend your other contacts to begin handling the new email contact. You may be able to control whether you receive this dialog box, with the **Wait for agent confirmation before accepting a contact** preference. For information, see Setting Preferences on page 180.

Note:

If you are alerted to an email contact but do not acknowledge it within a preset amount of time, the contact is assigned to another agent and removed from your Email task list. The amount of time is set by the administrator of the WebACD Server configuration.

Using the Email Task List

The Email task list displays the email contacts currently assigned to you. A typical Email task list is shown in the following illustration:



1. **Oldest contact**
2. **Active contact**
3. **Subject line of selected email contact**

If you click a contact in the Email task list, it becomes selected. The subject line of the selected contact is displayed when you click the contact. All tasks that you perform to the email in the Web Agent apply to the selected email contact. (When you double-click a contact, the Web Agent window opens and displays this contact in Compose mode or Reply mode.)

A good deal of information about your email contacts is displayed in the small space of the Email task list by visual cues, including icons and text.

Icons in the Email Task List

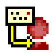
If you pay attention to the icons in the task list, you can see at a glance a lot of useful information. There are three columns of icons in the Email task list.

The icons in the first column indicate whether the email is active or has been transferred, as shown in the following table

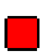
:

Icon	Description
	The email contact is active.
	You have transferred this email to your supervisor or to another agent. The contact remains in your task list until you wrap it up. **Note:** If you receive an error when you transfer an email to another agent, contact your administrator.

The icons in the second column give you information on the source of each email contact. You may see icons representing the following sources:

Icon	Description
	A reply to a normal email sent to the customer by the agent
	A reply from an external agent
	A reply from a customer to a request for additional information
	A reply to an email you forwarded.
	An email composed by another agent and forwarded to you for approval (Quality Assurance)
	An email rejected during Quality Assurance and sent to you for correction
	A reply to an email that you originated.
	An email alert, notifying you that an email requested from a customer or an external agent is overdue.
	A reply from an automatic response email that was sent to the customer from the Avaya IC system.

Icons in the third column the current status of each email contact, as shown in the following table.

Icon	Description
	New, unopened email contact.
	Open, active email contact. This is the contact you are currently handling in the Web Agent.
	Deferred email contact. Click this contact when you are ready to complete your email reply.

Icon	Description
	Email contact in WrapUp state. You are wrapping up this email in the Web Agent while you select information in the **Wrap-up** dialog box or you use a Prompter script.
	Email contact is in Inactive state. That is, a set amount of time has passed since you selected it. When you click it, this contact will become active.

Text in the Email Task List

The following areas give you text information about a selected email contact:

- Origin – The email address from which the email was sent.
- Age – The length of time the contact has been assigned to you. The time runs continuously until you complete the contact.
- Question box – The text the selected customer typed in as the subject of their email.

Tip:

You may not be able to see all of the information in the **Origin** and **Age** columns. To see all of the information, hold your cursor between two columns until the cursor changes its shape. Then click and drag the column to the left or right until you can see the information you want to see. Repeat in the other direction as desired.

Viewing Email History

You can search for copies of previous emails sent by your customers in the **History** dialog box. This dialog box has the following tabs:

- **Tracking History** – Detailed tracking information about the current email and past emails sent from a customer's email address
- **Customer History** – A list of previous emails the customer has sent to your company and copies of the emails themselves

Note:

Another agent may have deferred an email contact from this customer. You cannot see deferred email contacts in the **History** dialog box but you can see them in the Active Contact Viewer. It is a good idea to check the Active Contact Viewer when you are looking for information about a customer's recent contacts. See Viewing Active Contact Information on page 58.

To see the tracking history or previous emails of an email contact:

1. Display the email you want information about in the Email Preview mode.
2. Click the **Email History** button in the email toolbar to display the **History** dialog box.

   The **History** dialog box opens with the **Tracking History** tab displayed.
3. To see the maximum amount of information in the **Tracking History** tab, do any of the following:
   - To see all available information in a table column, hold your cursor at the right edge of any column title. When you see a double-headed arrow, click and drag to the right.
   - To see tracking information about past emails sent by this customer, select the **View Full Email History** check box.
4. To see complete technical information about the routing of any email selected in the table, select the **Header** check box. When there is a problem, this information may be helpful for supervisors or administrators.
5. To see copies of emails this customer sent to your company in the recent past, click the **Customer History** tab.
6. Check your dialog box to see the time range of the emails displayed. For example, the dialog box may display emails that were received in the past three months. If you want to see emails that arrived before this time range, you may be able to clear the check box to specify a longer time range.
7. Select any email in the box at the top to see a copy of the email itself in the scroll box at the bottom.

   Note:

   If you see an **Attachment** button (paper clip) to the right of a selected email, click the button to see a list of all attachments. Click the button to open the attachments or save them to your computer.

Composing a Normal Email Reply

The following procedure explains how to compose a normal reply to a customer email using features available in the Email reply screen.

To compose a basic email reply to a customer:

1. Ensure that you are available to handle email by looking at the Email Channel button in Avaya Agent. If the button shows a yellow *X*, click the button to make yourself available for email.

   You are now available to receive the number of email contacts that is set for you in your channel load. See Setting Your Channel Loads on page 55 for information about channel loads. After you become available, any email contacts that are routed to you show up in the Email task list.

2. In Avaya Agent, select a contact in the Email task list. If there is more than one contact, select the oldest one. The contacts are usually listed in reverse chronological order, that is, with the oldest contact at the top.

   For information about the meaning of the icons, and the text displayed in the Origin and Time columns, see Being Alerted to a New Email Contact on page 98.

   The Web Agent window opens in the Email Preview mode to show you this email and information about it. The Information Bar displays "New inbound message from customer."

3. Read the message using the scroll bar, if necessary, to see the entire message.

4. If you see the **Attachment** button (paper clip) in the Email Preview toolbar, this email has one or more attachments. Click the button to open the attachments or save them to your computer.

5. Before you begin your reply, you can use any of the following buttons in the email toolbar, as needed. You can also return to this **Preview** tab later to use these buttons.

   - **Print** – Prints the currently displayed email to the default printer.
   - **Resolve** – Lets you apply a status to the email. See Resolving an Email on page 122 for information.
   - **Email History** – Displays a dialog box with tracking information about this email or copies of previous emails sent from the current customer's email address, including email attachments, if any. See Viewing Email History on page 101 for more information.
   - **Transfer** – Displays the Unified Agent Directory so you can transfer this email contact to a particular agent, or transfer it to a queue and let Avaya IC route the email to the first available agent in that queue. For information, see Transferring an Email Contact on page 112.

- **Defer** – Defers your reply to this email contact until a later time. The contact remains in your Email task list but you are available for another email to replace this one. For more information, see Deferring an Email on page 113.
- **Wrap** – Wraps up this email contact. See Wrapping Up an Email Contact on page 129 for information.

6. To begin your reply, click one of the two reply buttons in the email toolbar:
   - **Reply** – Addresses your reply to the sender of the email and no one else.
   - **Reply to all** – Addresses your reply to the sender of the email and to all the people listed in the **Cc** (Copy) field of the message you are replying to.

   The window changes to Compose mode where you will write your email reply. Note that the drop-down menu indicates that this is a **Normal Reply**.
7. If you want to add the email address of anyone in your company, so that they will receive a copy of this email, add their email address easily to any of the address fields by using the UAD. See Addressing Emails with the UAD on page 105 for information.
8. Look in the Resource area of the window to determine if there are any Suggested Responses. If you see Suggested Responses, refer to Using Suggested Responses on page 109 for instructions about choosing a response or responses.
9. If you do not see Suggested Responses, look for any resources that are relevant to the customer's question in the Email Templates folder, Global Resources folder, or Agent Resources folder. For information on viewing resources, see Viewing Your Resources on page 177.
10. If you found a resource that you want to use, add it to your message. For information on adding resources to an email, see Using Resources in Email on page 107.
11. If you added a resource, read the message in the Message Composition area and modify it appropriately, if necessary.
12. Type your message to the customer in the Message Composition area. Be sure that you address the customer's question or problem.

    Tip:

    If you added a resource or an attachment, you may want to begin with a short introduction to explain the resource or the attachment.
13. Look over the buttons in the email toolbar to decide whether you want to execute any of the commands before you send your message. The buttons are as follows:
    - **Print** – Prints the currently displayed email to the default printer.
    - **Save** – Saves a draft of your message. The contact remains in your Email task list. The next time you double-click this contact and begin to reply to this customer's email, the **Compose** window opens with the message you saved.
    - **Cancel** – Displays a dialog box that asks if you want to save a draft of the reply you are composing. If you say **No**, your reply is deleted, and you must compose a new reply for this email contact.

- **Add Attachments** – Attaches a file from your computer's hard drive or from the hard drive of any computer that you can access on the network. When you press the **Add Attachments** button, a window is displayed where you can browse to the file and select it.
- **Spell Check** – Helps you check and correct the spelling of your message. For information, see Spell Checking Your Emails on page 117.

Tip:

You can select an option in the **Preferences** dialog box to bring up the Spell Checker automatically before your messages are sent. If you select this option, you will not forget to spell check your messages. See Setting Preferences on page 180.

14. When the message is complete, click the **Send** button.

    If the **Spell check before sending an email** option is selected in your Preferences, the Spell Checker is displayed so you can check the spelling in your message. Check the spelling, referring to Spell Checking Your Emails on page 117 if necessary.

    If the **Confirm before sending an email** option is selected, a dialog box asks if you are sure you want to send the message. Click **Yes**.

    To change the preferences that determine whether the Spell Checker or the confirmation dialog box are displayed whenever you start to send an email, see Setting Preferences on page 180.

    Your response is sent to the customer.

15. Click the **Wrap** button to wrap up the email contact. If you need more information, see Wrapping Up an Email Contact on page 129.

Addressing Emails with the UAD

When you address emails to people at your contact center, the Unified Agent Directory (UAD) can help you find and add the addresses quickly and easily, and without errors. The UAD opens in a special Email Addressing mode for this purpose. This is useful for the following tasks:

- Composing a Normal Email Reply
- Sending an Email to an External Agent
- Transferring an Email Contact
- Forwarding an Email
- Originating an Outbound Email

Note:

The following procedure explains how to add email addresses, not how to do other tasks such as transfer emails or send them to external agents. See the appropriate sections, as listed above, for those procedures.

To address an email using the UAD:

1. Display the email you are responding to in the **Compose** window.
2. Click the button beside the **Cc** or **Bcc** fields to display the UAD.

   The meaning of these fields is as follows:

   - **Cc** (Copy) – This field is for the address of any person or any queue that you want to receive a copy of this email.
   - **Bcc** (Blind Copy) – This field is for the address of any person or any queue that you want to receive a copy of this email, without anyone else seeing their address.

   Note:

   The **To** field is disabled for a **Normal Reply** and for a **Request Additional Information** email because the email is automatically addressed to the customer to whom you are replying.
3. If the queue or person you are looking for is not located in your site, select the name of the site from the **Site** drop-down menu. If you do not know where the queue or person is located, select **All Sites**.
4. Navigate through the **Queues** tab, **Agents** tab, or any other tab available to you, opening groups as necessary, until you find the queue or person to whom you want to address this email.
5. Select the desired name and then click the **To**, **Cc**, and **Bcc** button to add that person's email address.
6. Repeat the preceding steps as desired to add the addresses of all the intended recipients to your email.
7. Click **Ok**.

   The email addresses are added to the email you are composing.
8. If you are doing any of the following tasks, return to the appropriate section to finish your email and send it:

   - Composing a Normal Email Reply on page 103
   - Sending an Email to an External Agent on page 110
   - Transferring an Email Contact on page 112
   - Forwarding an Email on page 115
   - Originating an Outbound Email on page 124

Using Resources in Email

Resources are previously prepared text, emails, and URLs (Internet addresses) that you can send repeatedly to different customers by chat or email. Resources save you the time and tedium of typing the same things again and again. Text and email resources may contain such things as greetings, closings, and answers to frequently asked questions. Email resources may have information already entered in the **To**, **Cc**, and **Bcc** fields, and they may contain attachments. URL resources may be links to company Web pages. For example, a URL may link to a page about exchange policies.

When you are composing an email, you may see any or all of the following types of resource folders:

- Global Resources – This folder is for email, text, and URL resources created for you and other agents by supervisors. If you are an agent, you cannot create or modify these resources.
- Agent Resources – This folder is for email, text, and URL resources that you create for yourself. These resources are saved with your login ID. You are the only person who can see or use the resources you create.
- Email Templates – This folder is for a type of email resources called email templates. These are created for you and other agents by administrators. An email template is a prewritten email response that becomes customized when you use it. For example, your current customer's name and the current date may be automatically entered into the email resource whenever you use it. Your company may also send a copy of an email template when you apply a status to a customer's email. For information, see Resolving an Email on page 122.
- Suggested Responses – (If your company is not using the Content Analyzer, you never see this folder.) This folder is for email resources that are created by an Avaya software product, called the Content Analyzer, in response to a particular email. When these resources exist, you must consider using them before you consider using resources in any of the other folders. For more information, see Using Suggested Responses on page 109.
- Migrated Resources – You see this folder after you import migrated resources. Your administrator will inform you if you need to do this. See Importing Migrated Resources on page 179.

The resources in the Global Resources folder and the Agent Resources folder can be any of three types—email, text, or URL. The Email Templates and Suggested Responses folders, when these exist, are always email resources. Email, text, and URL resources are described in detail in Resource Types and Examples on page 172.

Using Global, Agent, or Email Template Resources in an Email

To use a global, agent, or email template resource in an email:

1. While composing an original email or an email reply, look through the resources available to you. See Viewing Your Resources on page 177 for information.
2. To use a resource, right-click it and select the appropriate option, depending on the resource type. The options are as follows:
   - **Email**, **Email Templates**, and **Suggested Responses** – **Use** is the only option. When you select this option, the entire email resource is used, including all header information and text in the resource. You can edit this information as needed.
   - **Text** – **Insert** and **Insert Quoted** are the options. **Insert** places the text of the resource into the email you are composing. **Insert Quoted** does the same as Insert but adds a special character at the start of every line to indicate that the text was pasted into the email. If you want to choose a different character to be inserted, see Email Preferences on page 183.
   - **URL** – **Insert** and **Insert Quoted** are the options. Insert pastes a copy of the URL from the resource into the email you are composing. **Insert Quoted** does the same as **Insert** but adds a special character to indicate that the URL was pasted into the email.

   ⚠ **CAUTION:**

   You may be able to send a resource directly to the customer by double-clicking it, depending on the way Avaya IC has been configured at your contact center. If double-clicking sends a resource to the customer, be careful not to double-click before you are ready.
3. If this is an email resource, email addresses in the **To**, **Cc**, and **Bcc** fields of the resource are added to your email, along with any addresses already in your email reply, such as the customer's reply address. Modify or delete these addresses, and add new ones if you want.

   Note:

   In a **Normal Reply** or a **Request Additional Information** email, you cannot edit the **To** field because the email is automatically addressed to the customer.
4. If there is no information in the **Subject** field, enter an appropriate subject.
5. Modify any text that was inserted from the resource into the body of your email, as necessary.
6. Finish composing the email.
7. Click **Send** when you are ready to send the message.
8. Click **Wrap** to wrap up the email contact.

Using Suggested Responses

Suggested Responses are generated automatically, either by Avaya IC or by software called the Avaya™ Content Analyzer. The software is guessing that these responses may appropriately answer the current customer's question.

When an incoming email in your Email task list has been analyzed, you see a Suggested Responses folder in the Web Agent. The resources are "dynamic," that is, the resources and the folder that contains them are only available when the email contact they were created for is active. When you complete that email contact, the resources that apply to it are removed.

You must read the email from the customer and decide which of the Suggested Responses best answers the customer's question or problem. If you see a score for the responses, this may help you decide. The higher the number, the more likely it is that this is a proper response to the customer's question.

To select and send Suggested Responses:

1. Double-click an email contact in the Email task list.

   The Web Agent window displays the customer's message in the Email Preview mode.

2. Read the customer's message, using the scroll bar if necessary to see the entire message. Be sure you understand what the customer is asking.

3. Click the **Reply** button or select **Contact > Reply** to begin your reply to the customer.

4. If you see a Suggested Responses folder, look at the responses with the highest scores first. The responses with the highest scores are displayed at the top of the list.

   Note:

   If you do not see a Suggested Responses folder, no Suggested Responses have been created for this message.

   The scores give an indication of the likelihood that each response is a good one. In other words, the higher the score, the more *likely* it is that this is a proper response to the customer's question. However, only you can decide what is *actually* the best response.

   Tip:

   You can hold your cursor over any Suggested Response to see information about it, without opening it.

5. If the responses have attachments, verify that the attachments are appropriate for the customer's question.

6. Right-click each response and select **View Resource**. Read the responses one by one, until you see one or more that you think answers the customer's question. You

may need to read all the Suggested Responses to find the response or responses that you think answer the customer's question best.

7. When you have found a response that you want to send to the customer, right-click it and select **Use**.

   The contents of the Suggested Response are inserted into your email reply.

8. If you want, add some additional text to address your customer directly, or make any small changes that you think are necessary to better answer your customer's question.
9. If you found other Suggested Responses that you think are appropriate, repeat Steps 7 and 8. Each time you select **Use** for a Suggested Response, that response is added to the message. You can add or delete text to help your customer understand the multiple responses.
10. When the message is ready, click **Send**.
11. Click **Wrap** to wrap up the email contact.

Sending an Email to an External Agent

If you do not know how to answer a customer's question or solve a customer's problem, you should ask for information from a person, usually outside of your company, who has been designated as an external agent because of special knowledge or skills.

You use a special type of email when you send an email to an external agent. This type of email sends you or another agent an alert message if you do not get a response from the external agent within a certain period of time.

You should defer the customer's email to put it on hold while you write to the external agent and wait for a reply. If you receive a reply from the external agent that will help your customer, you can find the deferred email and send the customer the information.

To send an email to an external agent about a customer's question:

1. Read the customer's email in the Email Preview mode.
2. If you need information from an external agent to answer the customer's question or problem, click the **Defer** button in the email toolbar to put the customer's email on hold.

   The email contact remains in your Email task list, marked with a red icon to indicate that it is deferred.

3. Click the **Reply** button or select **Contact > Reply**.

   The drop-down menu displays the **Normal Reply** selection.

4. Select **Send to External Agent** from the drop-down menu.

   The letters **RE:** are added to the beginning of the **Subject** field of the email to indicate to the external agent that this message is about an email you received.

5. Click the button beside the **To** field.

   The UAD is displayed in External Agent mode. Only external agents are visible.

6. If the external agent is not located in your site, select the name of the site from the **Site** drop-down menu. If you do not know where the external agent is located, select **All Sites**.

7. Navigate through the tenants and workgroups in the UAD for the name of the external agent.

8. Select the name of the external agent to move it to the **To** field.

   You can only include one email address in the **To** field. If you need to write to additional external agents, send a separate email, or add their email addresses to the **Cc** field.

9. Click **Ok** to add the external agent's email address to your email.

10. Compose your email to the external agent.

11. Click **Send** when you are ready to send this email to the external agent.

12. Click **Wrap** to wrap up this email contact.

Handling a Reply from an External Agent

If you or another agent previously sent an email to an external agent, you may receive a reply from the external agent as a contact in your Email task list.

To handle a reply from an external agent:

1. In Avaya Agent, select the reply from an external agent in the Email task list.

   A special icon in the task list identifies this as a reply from an external agent.

   The Web Agent window opens in the Email Preview mode to show you this email and information about it. The Information Bar informs you that this is a reply from an external agent.

2. Use the scroll bar, if necessary, to see first the message requesting information from the external agent. Then read the reply from the external agent.

3. Take whatever action is needed. For example:

   a. If you deferred the original email from the customer while waiting for the external agent to respond, double-click the **Defer** icon in the Email task list. This makes the email reply to the customer active again.

   b. Copy the information in the reply from the external agent by clicking Ctrl-C.

c. Paste the information into the reply to the customer.

d. Write any other text to the customer as appropriate.

e. Click **Send**.

f. Click **Wrap**.

Transferring an Email Contact

In most cases, you try to reply to your customers by yourself. But in some cases, you may not be able to handle a customer's problem. In those cases, you may want to transfer the email contact to another agent or supervisor. When you transfer a contact, it is removed from your task list, and it is no longer your responsibility.

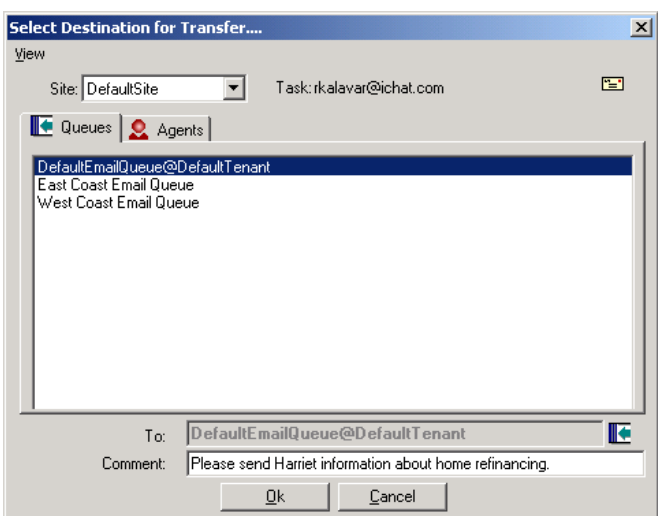
Tip:

If you want to transfer this email to a person with a particular skill, for example to someone who speaks a particular language or supports a particular product, first use the **Find** option to find the email address of a person with that skill. See Looking Up Agents with the Find Option on page 70.

To transfer an email contact:

1. If you are not viewing the email you want to transfer in Email Preview mode, click the **Preview** tab.
2. Click the **Transfer** button in the email toolbar.

   The **Select Destination for Transfer** dialog box is displayed.



3. If you want to transfer the email to anyone in a particular queue, do the following:
   a. Select the queue from the **Queues** tab.

      The name of the queue is displayed in the **To** field.
   b. If you want to include a message to the agent who will receive the email, put your cursor in the **Comment** field and type the message.
   c. Click **Ok**.

   The Email is transferred to the queue that you specified. The contact is removed from your Email task list.
4. If you want to transfer this email to a particular person, click the **Agents** tab or the appropriate workgroup tab. Then do the following:
   a. If the person you are looking for does not belong to the tenant or workgroups that are displayed, make an appropriate selection from the **Site** drop-down menu. If you are not certain which site the person belongs to, select **All Sites**.
   b. Navigate through the tree structure. Click the plus button (**+**) beside the name of any tenant or workgroup to display its contents. Use the scroll bars as necessary to see more information.
   c. When you find the name of a person you want to transfer this email to, click the name select it.

      The name of the agent is displayed in the **To** field.
   d. If you want to include a message to the agent who will receive the email, put your cursor in the **Comment** field and type the message.
   e. Click **Ok**.

   The Email is transferred to the agent that you specified. The contact is removed from your Email task list.

Deferring an Email

When you need considerable time to find an answer to a customer's question or a solution to the customer's problem, you can defer the email contact so you can work on it at a later time.

When an email contact is deferred, another email contact can be routed to you in the place of the deferred contact. For example, if your channel load allows you to handle only one email, when you defer an email, another email can be routed to you.

To defer an email:

1. Click the **Preview** tab for this email if you are not already viewing the email in the Preview mode.
2. Click the **Defer** button in the email toolbar.

   The email is saved as a draft, including the customer's address and any text that you began writing. The email contact remains in your Email task list, marked with a red icon to indicate that it is deferred.
3. Take any action necessary to find an answer the customer's question. For example, you may want to send an email to an external agent asking for information, or you may want to transfer the email contact to another agent. See Sending an Email to an External Agent on page 110 or Transferring an Email Contact on page 112.

   Note:

   After you defer the email, you are available for another email to replace it. The wait time for the contact continues to count while the email contact is deferred. When you are ready to work on this email, see Finishing a Deferred Email on page 114.

Finishing a Deferred Email

If you deferred an email, you must return to it and complete it as soon as you can.

To finish a deferred email:

1. When you are ready to return to an email that you previously deferred, double-click it in your Email task list.

   The **Compose** window displays the message that you deferred. This is now an active email contact.

   Tip:

   While you are replying to an email that you previously deferred, you are still available for another email. If you do not want to receive another email contact while you are replying to this email, click the **Agent** button or the **Email Channel** button in the Avaya Agent to put yourself in Aux-work (Busy) state. After you finish replying to the email, click the button again to make yourself Available.
2. Finish writing your email reply. If you received information to help your customer, select and copy the information by clicking Ctrl-C. Then paste the information into the email reply by clicking Ctrl-V.
3. When the email is ready, click **Send** to send the email.
4. Click **Wrap** to wrap up the email.

Saving a Draft

When you begin to reply to an email but cannot finish your reply at the moment, you can click the **Save** button to save it as a draft. This saves the contents of your reply in the **Compose** window and the email contact remains in your Email task list. When you are ready to return to your reply, click its **Compose** tab. No new email contact can replace this one until you finish your reply and send it.

Tip:

If you need to leave an email for a period of time because you are waiting for information, you can defer the email and return to complete it later. This lets you receive another email in its place. Deferring an Email on page 113 for information.

Forwarding an Email

You may occasionally want to use Avaya Agent to forward a copy of an email that you received to another email address. For example, you may want to forward an email expressing a customer's interest in a product that another agent supports. This lets the agent contact the customer.

Do not use Forward:

- To transfer ownership of an email to another agent. If you need to transfer ownership of an email to another agent, see Transferring an Email Contact on page 112.
- To write to an external agent for help with the email. If you need to obtain information from an external agent, see Sending an Email to an External Agent on page 110.

If the Unified Agent Directory (UAD) at your contact center uses workgroup tabs or an **Agents** tab, you can use the UAD to forward the email to a particular person, or to anyone in a particular workgroup or anyone with a particular skill.

To forward an email:

1. With the email displayed in the Email Preview window, click **Forward**.

   The Information Bar tells you that the email will be forwarded to the specified recipient. The **Subject** field uses the subject of the email you are forwarding, preceded by FW: to indicate that this is a forwarded message.

2. Write a message to the recipient or recipients of this forwarded email at the top of the message itself. You may want to explain why you are forwarding the email and give any other relevant information.

Tip:

If you want to forward this email to a person with a particular skill, for example to someone who speaks a particular language or supports a particular product, use the **Find** option instead of the **Agents** tab described in the following steps. See Looking Up Agents with the Find Option on page 70. Then return to finish the remaining steps of this procedure.

3. Click the button beside the **To**, **Cc**, or **Bcc** fields, according to which of the following address fields you want to use:

   - **To** – The main person to whom you want to forward this message. You can only include one email address in this field.
   - **Cc** (Copy) – Anyone else that you want to receive a copy of this email.
   - **Bcc** (Blind Copy) – Anyone that you want to receive a copy of this email without anyone else seeing their address.

   The UAD opens in Email Addressing mode. This mode makes it easier for you to add email addresses. In this mode, the UAD displays only the agents that are enabled for email and it contains only their email addresses.

4. If you want to forward this email to a person, click the **Agents** tab or the appropriate workgroup tab. If you want to forward this email to a queue, click the **Queues** tab. Then do the following:

   a. If the person or queue you are looking for does not belong to the tenants or workgroups that are displayed in the box, make an appropriate selection from the **Site** drop-down menu. If you are not certain which site the person belongs to, select **All Sites**.

   b. Navigate through the tree structure on the left. Click the plus icon (**+**) beside the name of any tenant or workgroup to display its contents. Use the scroll bars as necessary to see more information.

   c. When you find the name of a person or queue you want to forward this email to, select it from the list.

   d. Click the **To**, **Cc**, or **Bcc** button to move the name of the person or queue to the appropriate box.

   e. Click **OK**.

   The email address of the person or queue you selected is added to the appropriate field of the email you are composing.

5. Repeat as desired if you want others to receive this forwarded email.
6. If you want to forward this email to anyone who is not in the UAD, type their address in the appropriate field.
7. Click **Send** when you are ready to forward this email to all the included addresses.
8. Do any other required action to resolve the customer's problem, such as the following:

   a. Reply to the customer's email (see Composing a Normal Email Reply on page 103)

b. Request additional information from the customer (see Requesting More Information from Customer on page 119)

c. Request information in an email to an external agent (see Sending an Email to an External Agent on page 110)

9. Click **Wrap** to wrap up this email contact.

Spell Checking Your Emails

The Spell Checker can help you find and correct spelling errors in your email.

You can set two email preferences related to the Spell Checker.

- A preference lets you display the Spell Checker automatically whenever you press the **Send** button. If you do not set this preference, you must select the **Spell Check** option each time you want to check the spelling of an email message.
- A preference lets you determine whether the Spell Checker will always check the customer's original message as well as your reply or check *only* your reply.

Note:

If you set the preference to check only your reply, not the original message, you should be careful when you use the **Change All** feature. The **Change All** feature may not change all occurrences of the word, possibly leaving misspelled words, if you do either of the following things:

- If you clicked the **Ignore** button when the Spell Checker found this misspelled word in previous text of this email, then it will continue to ignore the misspelled words.
- If you cancel the spell check before it has finished checking the entire message, the misspelled word might occur in text that was not checked.

For information on how to set preferences, see Setting Preferences on page 180.

To check the spelling of an email:

1. Select **Contact > Spell Check**.

   The Spell Checker is displayed.

Tip:

The Spell Checker has many features, all of which are labeled. You can see what happens when you click any of the buttons on the right side of the dialog box by holding your cursor over the button until a tooltip appears.

2. If you composed the message in any language other than your primary language, select that language from the **Available languages** drop-down menu.

   This action changes to the dictionary of that language. Any words that are not in the currently selected dictionary are displayed in the **Not in dictionary** text box.

3. If you see a word in the **Not in dictionary** box, look at the word to determine if you think it is spelled correctly. Look at the list of words in the **Suggestions** box to determine if any of those words is the correct spelling for the word. If so, select the word and click the **Change** button.

   Tip:

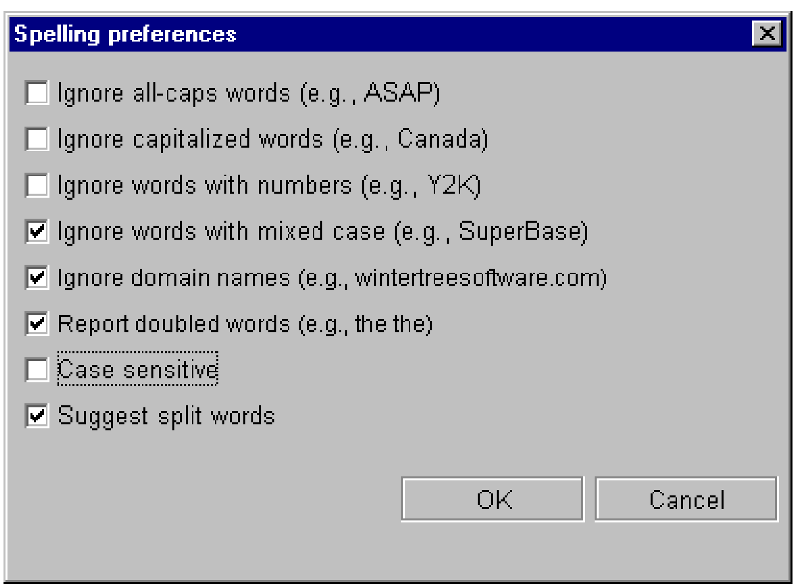
   If a word is displayed in this box, it is not included in the currently selected dictionary. However, it may be spelled correctly. For example, names of people and products are not in the dictionary. If you think that you may use a name again, click the **Add** button to add it to your dictionary.

4. If a misspelled word appears several times in your message, you can use the **Change All** button to correct every occurrence of the word.

   CAUTION:

   Be careful using the **Change All** button. Some occurrences of the word you are searching for may be incorrect in one place but correct in another. Or the word you are searching for may be part of another word. When you use the **Change All** button, you must also be certain that the correct spelling is in the Change box.

5. You may decide that you do not want the Spell Checker to check certain types of words. Click the **Options** button to bring up a dialog box like that shown in the following illustration in which you can select items for the Spell Checker to ignore.



6. When you are finished checking this message, click **Cancel**.

Requesting More Information from Customer

Occasionally a customer may send you an email with incomplete information. For example, the customer wanted to place an order but forgot to include a ZIP code in the shipping address. In this case, you send a special type of email asking for the missing information.

To request additional information:

1. Display the email from the customer in Email Preview mode.
2. Click the **Reply** button or select **Contact > Reply**.

   The window changes to Compose mode. The drop-down menu under the toolbar indicates that this is a **Normal Reply**. You must change this, as indicated in the next step, if you decide that more information is needed from the customer.
3. Select **Request Additional Info** from the drop-down menu.

   The Information Bar states, "This email will be sent to customer to request more information."
4. Put your cursor at the top left of the Email Composition Area and compose an email to the customer. Explain that you need more information to help them or fulfill their request. Tell them exactly what information is missing.
5. When your email reply is finished, read it to verify that everything is correct.
6. Click **Send**.

   The email request is sent to the customer.

   Note:

   If the customer does not reply within the time limit set by administrators, you or another agent will receive an email alert, an automatically generated email notifying you that the customer has not replied. If you receive an alert, see Responding to an Email Alert on page 120.
7. Click the **Wrap** button to wrap up the email contact.

Handling a Customer Reply to a Request for Information

If you or another agent sent a **Request Additional Info** email to a customer, you may receive the customer's reply.

To handle a reply to a Request Additional Information email:

1. In Avaya Agent, select the reply in the Email task list.

   A special icon in the Email task list identifies this as a reply to a request for additional information.

   The Web Agent window opens in the Email Preview mode to show you this email and information about it. The Information Bar informs you that this is a customer reply to a request for information.

2. Use the scroll bar, if necessary, to see the original message requesting information. Then read the reply from the customer.
3. If the information is still not complete, reply to this message as another request for information, as indicated in Requesting More Information from Customer on page 119.
4. If the information is complete, click **Reply** to compose a reply to the customer. Thank the customer for the information. Include any other message to the customer as appropriate.
5. Click **Send** to send your request or your reply.
6. Click the **Wrap** button to wrap up the email contact.

Responding to an Email Alert

Occasionally you may receive an email alert. The purpose of this type of email is to notify you that a response from a customer or external agent to a previous email is overdue. Email alerts are generated automatically by the Avaya IC software.

A special icon in the Email task list indicates that this is an email alert. The Information Bar in the Web Agent also informs you that this is an email alert.

The original email related to an email alert may be either of these:

- **Request Additional Info** - An email was sent to the customer requesting more information, and the customer did not respond within the time limit for this type of email.
- **Send to External Agent -** An email was sent to an external agent requesting information, and the external agent did not respond within the time limit for this type of email.

In some cases, you are the agent who sent the original email that requested a response. In other cases, another agent sent the email.

When you receive an email alert, you must take action to try to get a response.

To respond to an email alert:

1. Double-click the email alert contact in your Email task list.

   The Web Agent is displayed in the Email Preview mode. The Information Bar states, "This is an email alert. The recipient of a request for information has not responded to a request."

2. Read the email to see what additional information was needed from the customer or the external agent.

   Tip:

   If you did not send the email requesting information from the customer or external agent, you may want to click the **Email History** button to learn more about this email or previous emails from this customer.

3. If the original email related to this alert was a **Request Additional Info** email, you should try again to get a response from the customer. You have three choices:

   - Call the customer on the telephone and ask the customer for the information. See Initiating a Voice Contact on page 94.

     OR

   - Send the customer another request for information. If the customer fails to reply within the set amount of time, another email alert will be generated. While viewing the email alert in Email Preview mode, click the **Reply** button or select **Contact > Reply**. Select **Request Additional Info** from the drop-down menu. Write a message to remind the customer about the required information. Send the email and wrap the contact.

     OR

   - Send the customer a normal reply. This will not generate another alert. While viewing the email alert in Email Preview mode, click the **Reply** button or select **Contact > Reply**. Leave **Normal Reply** selected in the drop-down menu. Write a message to remind the customer about the required information. Send the email and wrap the contact.

4. If the original email related to the email alert was sent using the **Send to External Agent** selection, you should try again to get a response from an external agent. You have two choices:

   - Call the external agent on the telephone and ask for the requested information. See Initiating a Voice Contact on page 94.

     OR

   - Send the email to another external agent or the same external agent.

a. While viewing the email alert in Email Preview mode, find the text of the original email that was sent to an external agent, scrolling down as necessary. Select that text. Then click Ctrl-C to copy the text.

b. Begin a new email by selecting **Tools > Compose Email**.

c. Click on the button in the **To** field and select an external agent. If you need information about finding an external agent, see Sending an Email to an External Agent on page 110.

Tip:

It is usually a good idea to select a different external agent than the one the original email was sent to.

d. Click Ctrl-V to paste the text that you copied from the email alert into the new email.

e. Write an additional message if necessary to explain further what information is needed.

f. Click the **Send** button.

Your reply is sent to the selected external agent.

g. Click the **Wrap** button to wrap up the email alert contact.

Resolving an Email

You can resolve a message without writing an email response. When you resolve an email, you apply a status to it. The status tells the Email Management software how to handle this type of email. For example, the software may reply to the customer's message automatically, using an email template. An email template is a complete email response that can be used to reply automatically to customer emails that are alike in some way.

For example, your company may set up a Dismiss status. You are to apply this status when all of a customer's problems have been resolved and the customer writes an email to thank you for your help. When you apply the Dismiss status, a copy of an email template is sent to the customer. The text of the email thanks the customer for contacting your company and invites them to contact the company again.

Your company has defined the list of statuses and the responses that are carried out for each status. The statuses and responses may include the following:

- A customer sends an email praising the service or product they received. You apply an Acknowledge status. A copy of an email template is sent to the customer to thank them for their email.
- A person sends an email to your company's email Support address, but the person is not listed as a customer. You apply a Rejection status. A copy of an email template is

sent to tell the customer that they cannot receive support to help them solve their problem until they purchase a product.

- A customer sends a frequently asked question (FAQ) about cameras, for example. You apply a Camera status. A copy of an email template is sent to describe the cameras that they may buy.

You may need to ask your administrator or supervisor what types of messages you should resolve and what statuses you should apply to them.

To resolve an email:

1. Become familiar with the email statuses that are available to you before you need to use them. Ask your administrator for information, or click the **Resolve** button in the Email Preview mode and read the description of each status.
2. When you receive an email contact that you need to resolve because it fits one of the statuses, display the email in the Email Preview mode.
3. Click **Resolve**.

   A dialog box is displayed asking you to select a status to apply to this message.
4. If the email is in a language that is not the primary language used at your company, select the language from the **Filter by language** drop-down menu.
5. Read the description of each status.
6. If an email template is displayed in the scroll box at the bottom of the dialog box, read the message for each status to determine if it is an appropriate response to this email.

   Tip:

   You may see strings of characters within the messages that you do not understand. These character strings may be variables, that is, character strings that stand for information that changes automatically when the template is used. For example, the %date% character string may be a date variable that will change to the current date and %customername% may change to the current customer's name whenever you use this resource.
7. Select the status that is appropriate for this email, and click **Resolve**.

   The Email Management software carries out the action that is associated with this status. The dialog box closes and the email contact is removed from your Email task list.

Originating an Outbound Email

You may occasionally want to originate an email, that is, to send an email that is not a reply to an incoming customer email. Usually, you originate an outbound email when you want to send an email to an external agent to ask for information. The UAD helps you address an original outbound email to an external agent.

To originate an outbound email:

1. If the Web Agent is not currently displayed, click the **Web Agent** button in the task bar.
2. In the Web Agent, select **Tools > Compose Email**.

   The window is displayed in the Compose mode.

   The Information Bar informs you that this is a new outbound email.
3. If you want to address this email to an external agent, click the button beside the field you want to use, as follows:
   - **To** – The main person or persons to whom you want to address this message directly.
   - **Cc** (Copy) – Anyone that you want to receive a copy of this email.
   - **Bcc** (Blind Copy) – Anyone that you want to receive a copy of this email, without anyone else seeing their address.

   The UAD opens in Email Addressing mode. In this mode, the UAD displays only external agents.
4. If you are looking for an external agent who does not belong to the tenant or workgroups that are displayed, make an appropriate selection from the **Site** drop-down menu. If you are not certain which tenant or workgroup the person belongs to, select **All Sites**.
5. Navigate through the tree structure. Click the plus icon (**+**) beside the name of any tenant or workgroup to display its contents. Use the scroll bars as necessary to see more information.
6. When you find the name of the external agent that you want to address this email to, select it from the list.
   a. Click the **To**, **Cc**, or **Bcc** button to move the name to the appropriate box.

   Tip:

   If you know an email address of someone else to whom you want to address this email, type the address in the appropriate address field.

b. Click **Ok**.

The email address of the external agent is added to the appropriate field of the email you are composing.

If you need to delete the name of a person that you selected, click the name and press the Delete key on your keyboard.

7. Repeat as desired to add other email addresses.
8. Put your cursor in the Email Composition area and type your message.
9. Use the **Add Attachment** or **Spell Check** buttons as desired.
10. When you are ready to send your message, click **Send**.
11. If a dialog box asks you for the information, specify the language to be used and the queue to be used. The queue you select will be used in the **From** address of the email. Therefore, replies to this email will be routed to the same queue.

Tip:

You can set preferences for the system to select the default queue or default language automatically. Then the dialog box will not be displayed whenever you send an original outbound email.

12. If a dialog box asks for confirmation, click **OK**.

Your email is sent to the recipients.

Approving or Rejecting an Email

The email replies that you and other agents send, or a certain percentage of them, may be sent to an Approver for Quality Assurance before the emails are sent to customers. You may be a designated Approver, even if you are not a supervisor. This section assumes that you are a designated Approver.

When you receive an email that needs Quality Assurance, the Email task list displays a Quality Assurance icon. You should give high priority to an email needing Quality Assurance because the customer is waiting for a reply and the approval process may take time.

When you click an email contact that has been sent to you for Quality Assurance, the Information Bar also alerts you to the fact that the email was sent to you for your approval or rejection.

To handle an email sent to you for Quality Assurance:

1. Double-click the email contact in your Email task list.

   Notice that the Information Bar informs you that this message needs Quality Assurance.

2. Look at the customer's message at the bottom of the email.
3. Click the **Quality Assurance** button.

   The email is displayed as a reply to the customer in Quality Assurance mode. Depending on the way the Quality Assurance feature was set up by your administrator, the reply you compose to the customer here may be sent for approval again or it may be sent directly to the customer.

4. Carefully read the agent's reply to the customer's email. Read any attachments as well. Look for the following things:
   - Did the agent respond appropriately to all of the customer's questions and problems?
   - Did the agent use polite language?
   - Did the agent use reasonably correct grammar and spelling?
   - Did the agent include company promotional information, if applicable?
   - If the email used any resources, are they entirely appropriate?
   - If the email has attachments, are they appropriate?
5. If your answer to all of the previous questions is yes and you do not see any other problems with the email, do the following:

   a. Click **Approve** from the drop-down menu.

   b. Click **Send**.

   The email is sent directly to the customer.

6. If you see problems with the email, do the following:

a. Click **Reject** from the drop-down menu.

The Information Bar changes to indicate that you rejected the agent's message.

b. Write a message explaining to the agent exactly what they need to do to make the email reply acceptable.

Note:

You may want to ask your administrator whether the agent who receives this rejected email is always the agent who wrote the reply. In some cases, the administrator has set up the software so that an Approver's comments and a copy of the original email reply are sent to any available agent.

c. Click **Send**.

A confirmation dialog box is displayed.

d. Click **Yes**.

This message is sent to the agent for correction. When the agent corrects the message and sends it again, the reply may be sent directly to the customer or it may be routed to you or another Approver, depending on the setup at your contact center.

Handling a Rejected Email

Some or all of the emails you and other agents write to customers may be sent for approval (also known as Quality Assurance) to another agent or a supervisor who is designated as an email Approver. This person reads each email that is sent for approval and takes one of the following actions:

- Approves the email and sends it to the customer.
- Makes corrections to the email, marks it as Approved, and sends the corrected email to the customer.
- Marks the email as **Rejected**, along with a message explaining what needs to be done to make the message acceptable and sends the email for correction. It may be routed back to the original agent who wrote the rejected email or to any agent, depending on the setup at your contact center.

If you receive a rejected email in your Email task list, the email icon contains an *X* to indicate that it is a rejected email. You should usually select this contact before other email contacts in the list because the customer is still waiting for a reply.

To edit a rejected email:

1. Double-click the rejected email contact in the Email task list.

   The Web Agent window displays the rejected email in Email Preview mode. The Information Bar identifies this as a rejected message.

2. Read the message carefully, noting the comments that the Approver put in the email. Note what changes are required to make the email to the customer acceptable.

3. Click the **Reply** button or select **Contact > Reply**.

   At this time, this email becomes a normal reply.

4. Edit the email according to the changes recommended by the Approver.

5. When you are finished, reread the message from the Approver and check that you made all the desired changes.

6. Remove the message from the Approver and the original reply that was rejected.

   CAUTION:

   The previous step is crucial. You must remove everything from this reply except the new message to the customer.

7. Read the entire message to check it again. Make any necessary changes.

8. When you are ready to send the message, click **Send**.

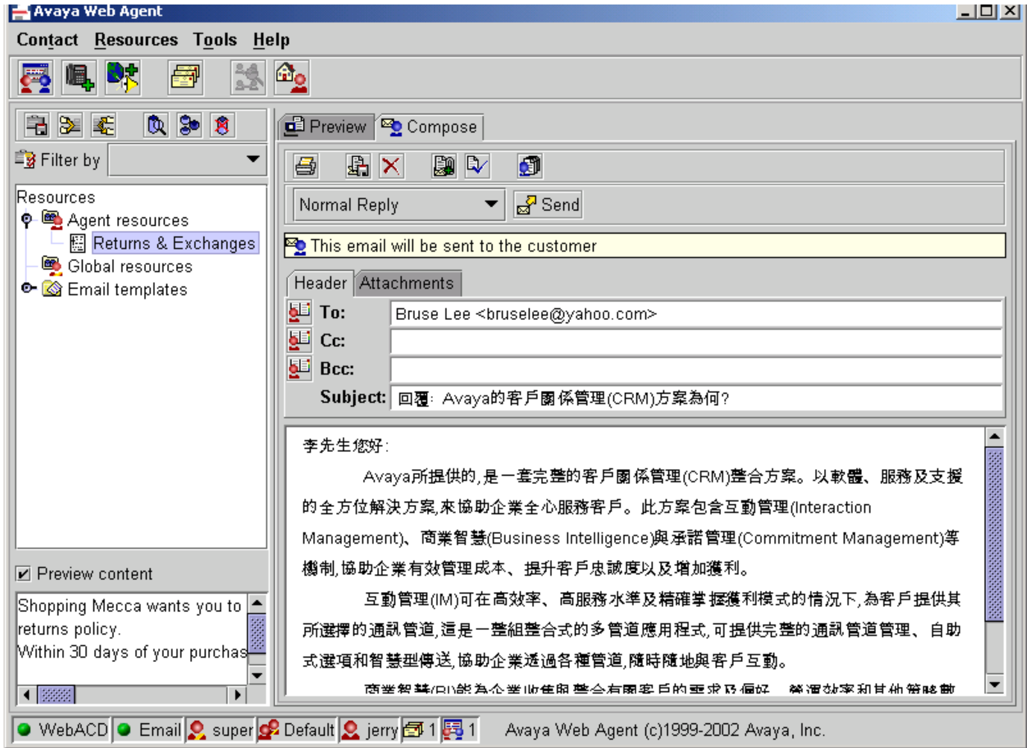
   Depending on the setup at your contact center, the message is either sent back to an Approver or sent to the customer.

Using Multiple Languages with Email

You may receive emails in a language that is not your primary language. If you know the language well, you may reply in that language. Check with your administrator if the language is not displayed properly.

You can also spell check your reply in that language. When you open the Spell Checker (select **Contact > Spell Check**), select the appropriate language from the **Language** drop-down menu.

In the following illustration, an agent is replying to an email in Chinese:



If you use another language, you may want to create some Agent Resources in that language. See Managing Resources on page 171.

Wrapping Up an Email Contact

When you have sent a normal email reply to a customer, you may need to wrap it up. In some contact centers, email is wrapped up automatically whenever an agent sends a reply to the customer. Ask your administrator if your emails are wrapped up automatically. If the answer is yes, you do not need to read this section.

You can select Email Preferences to wrap up email responses automatically after you send them. see Setting Preferences on page 180.

When you click the **Wrap** button, you are in WrapUp state. While in this state, you cannot receive another email contact to replace this one. You may need to perform the following tasks:

- Enter information about the session in a **Wrap-up** dialog box.
- Follow a WrapUp script in Prompter.

Note:

In certain cases, you may not see a **Wrap-up** dialog box for any of the following reasons:

- The email contact was removed because you did not respond in the allotted amount of time.
- Your supervisor removed the email contact to put it back in a queue.
- The email contact was cancelled in the server.
- The email contact was wrapped automatically because a preference to wrap up this type of email automatically is selected in Email Preferences. For information about the wrap-up preferences, see Setting Preferences on page 180.

To wrap up an email contact:

1. After you send an email, click the **Wrap** button in the email toolbar.
2. If a dialog box asks if you want to confirm, click **Yes**.

   Tip:

   You can set a preference to control whether this dialog box is displayed whenever you wrap up an email contact. See Setting Preferences on page 180.
3. If you see a **Wrap-up** dialog box or a Prompter script, fill in the questions about this email contact. For information about the dialog box or script, see Wrapping Up Contacts on page 76.

   The email contact is completed. It is removed from your Email task list.

Chapter 5: Managing Chat Contacts

If your account is enabled for Web Management, you use the Web Agent to “chat” with customers (that is, to exchange typed messages with customers in real-time).

Customers visiting your company’s Web site who have a question or want help can click a button to request a chat session (or a chat session with a phone call or VoIP call). A request for a chat session becomes a chat contact. Avaya™ Interaction Center (Avaya IC) routes chat contacts to agents who are available to handle chat. Chat contacts that are routed to you are displayed in your Chat task list.

This chapter explains how to receive and manage your chat contacts and the related collaboration features. Collectively, these chat and collaboration features are referred to as Web Management.

The chapter contains the following topics:

Being Alerted to a New Chat Contact

Chat requests sent by customers who click the **Chat** button on the company Web site, a chat contact is created. Chat contacts may be routed to you whenever you are available for chat.

With chat, it is particularly important to respond quickly. Depending on how the Avaya IC software has been set up at your contact center, you may be alerted to a new chat contact in two ways:

- By a sound. A Contact preference lets you determine whether you are alerted with a sound. For information, see Setting Preferences on page 180.
- By a screen pop. This is a dialog box that asks if you want to suspend your other contacts to begin handling the new chat contact. The "Wait for confirmation before accepting a contact" preference lets you determine whether screen pops are displayed when new contacts arrive. For information, see Setting Preferences on page 180.

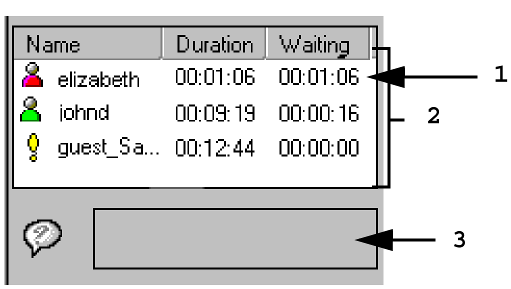
Note:

When a screen pop informs you that a new chat contact has arrived, clicking **OK** or pressing the Enter key begins the chat session with the customer. Be careful not to click **OK** or **Enter** accidentally when a screen pop appears. To be sure that you do not do this, you can turn off the **Wait for agent confirmation before accepting a contact** preference.

If you are alerted to a chat contact but do not acknowledge it within a preset amount of time, the contact is assigned to another agent and removed from your Chat task list. The amount of time is set by the administrator of the WebACD Server configuration.

Using the Chat Task List

The Chat task list displays all the chats that are currently assigned to you. Your Chat task list is probably located near the bottom of your **Media** pane. Your Chat task list may look something like this:



1. **Oldest contact**
2. **Chat contacts currently assigned to you**
3. **Customer's question (empty when your cursor is not over a contact or when no chat contact is selected)**

Each entry in your Chat task list relates to a different chat contact. If you have more than one chat contact in the Chat task list, you can click each contact in turn to display its customer's question. For each chat contact, the Chat task list displays the following information:

- Customer's question – The text the customer typed when requesting a chat. The question is displayed only when you select the chat contact. The question is also displayed in the Web Agent when you double-click to make this the active contact.
- Name – The name that the user chose to log in to the Web site. Users can also log in as "guest."
- Duration – How long ago the customer was assigned to you. This time runs continuously until you complete the contact.
- Waiting – How long ago the customer responded to you or requested a chat.

Each chat contact has a customer icon. The color on the customer icon changes as the status of the chat contact changes. Shirt colors and other symbols indicate status as follows:

- Red – It is your turn to respond. The customer has waited longer than the maximum desirable time set up by your administrator.
- Yellow – It is your turn to respond. The customer responded recently. The customer has not yet waited longer than the maximum desirable time.
- Green – It is the customer's turn to respond. You sent the most recent chat message.
- Blue with an arrow symbol – This contact was transferred to you.
- Exclamation mark or something else if the icon was customized – It is the customer's turn to respond. The customer has not responded for awhile.

Icons are also used for chat contacts in which a customer requested a phone call (Chat & Phone) or a VoIP call (Chat & VoIP). These icons are the same as the icons for those features in the Web Agent.

Identifying the customer chat client

Avaya IC includes two chat clients that a Website customer can use when they chat with an agent. Depending on your setup, all chat customers might use the same chat client. Or, you might have some customers who use one chat client and other customers who use the second chat client.

In addition to the language selected by the customer, you see a message in the transcript at the beginning of a chat session. The message identifies if the chat client used by the customer does not support all features.

Note:

The Welcome messages in the following table are the default messages. These messages may be different in your system.

The following table describes the chat clients available with Avaya IC.

Chat client	Description	Welcome message	Supported features
Customer Chat Applet	Opens in a separate window next to the internet browser used by the customer. The set of features provided by this chat client depends upon which Java plugin the customer has on their machine.	–	• Text chat • Page push • Join Us • Shared browsing or Collaborative form filling • Voice chat
		Warning: Java Plugin is enabled on Customer's machine.	• Text chat • Page push • Join Us • Voice chat
Customer HTML Chat Client	Can open in a separate window next to the internet browser or in a frame of the website. This chat client provides a reduced set of features.	Welcome to Avaya Chat. You can chat and send pages.	• Text chat • Page push • Join Us

Handling a Basic Chat Session

This section presents the basic procedures to use with a customer in a chat session. Before you go through the procedure, it is important for you to understand a chat session from the customer's point of view.

When customers visit the Avaya™ Interaction Center (Avaya IC) Web site that you are supporting, they can click buttons to ask for different types of help. If they click a **Chat** button, they are prompted to log in either with their user name and password or as a guest. The customer will type chat messages to you in the chat client.

As the request is routed, a message displayed in the chat client informs them that an agent will be with them shortly. If the request is routed to you, you see the chat contact in your Chat task list. As soon as you double-click the contact, the customer sees a message in the chat client that you have arrived to help them.

You should begin the chat session as instructed by your contact center administrators. For example, you may type "Hello" and introduce yourself.

Note:

Before you begin chatting with your first customer, ask your administrator how you send chat messages to customers. Do you click the Enter key on your keyboard or do you click the **Say** button in the Web Agent?

To interact with a customer using chat:

1. Look at the **Chat** button in the Avaya Agent status control. If the button has a yellow *X*, click the button to make yourself available for chat.

   When the **Agent** button does not have a yellow *X*, you are available to receive the number of chat contacts that is set for you in your channel load. See Setting Your Channel Loads on page 55 for information. Your channel load for chat is also displayed in the Chat icon in the Status Bar at the bottom of the Web Agent.

2. In the Chat task list, double-click the contact you want to accept for a chat session. Usually this is the customer who has waited in queue the longest, whose name is at the top of the list.

   If this is your first chat contact since you logged in or if this is the first chat session you are monitoring, the **File Download** dialog box is displayed. The dialog box asks you to choose what to do with the aimagentcl.hta file. This dialog box will not appear again until your next login session.

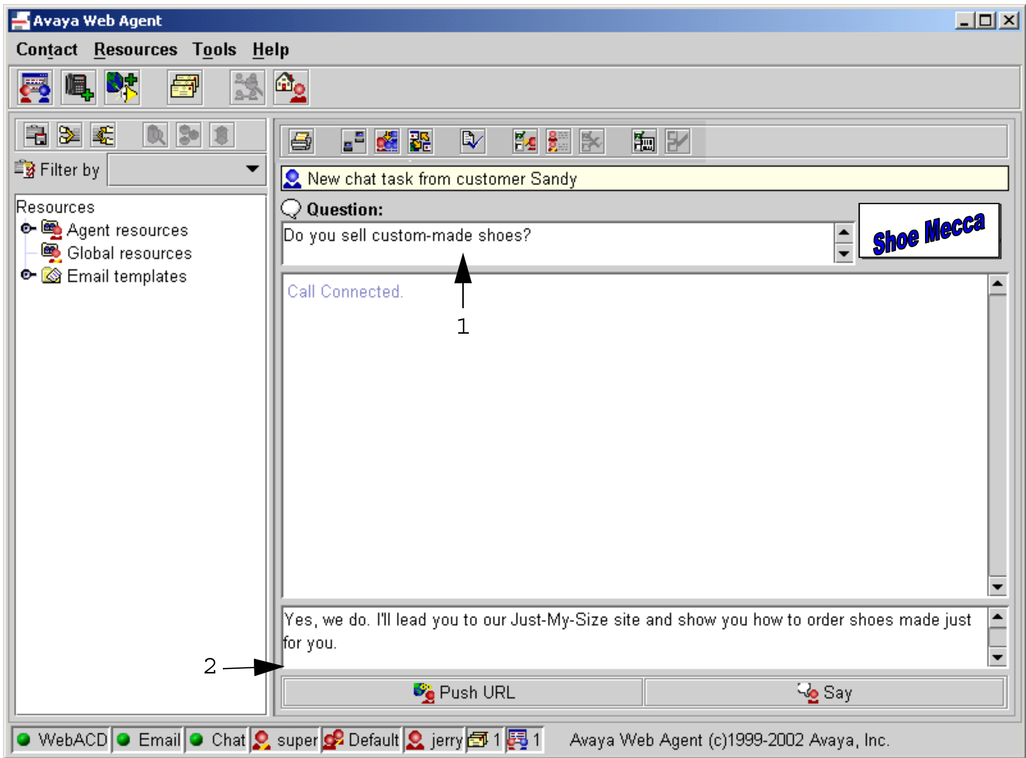
   CAUTION:

   As indicated in Step 3, you must open the aimagentcl.hta file. Do not save this file. If you save this file, Web Agent cannot access the file and Shared Browsing will not function.

3. If the **File Download** dialog box is displayed, click **Open this file from its current location**Then click **OK**.

   An Internet browser icon is added to your Windows Task Bar. This is the browser you will use for Shared Browsing with your first chat customer. For each chat contact that you handle or monitor, another browser will open and another icon will appear in the task bar. If you are a supervisor and do not plan to use Shared Browsing in your monitoring sessions, you can select the “Start collaboration automatically when monitoring a chat session” preference. When this preference is selected, a browser and an icon do not appear for each session. See Setting Preferences on page 180 for more information.

The Web Agent opens in Chat mode, as shown in the following illustration.



1. **Customer's question**
2. **Type your messages here.**

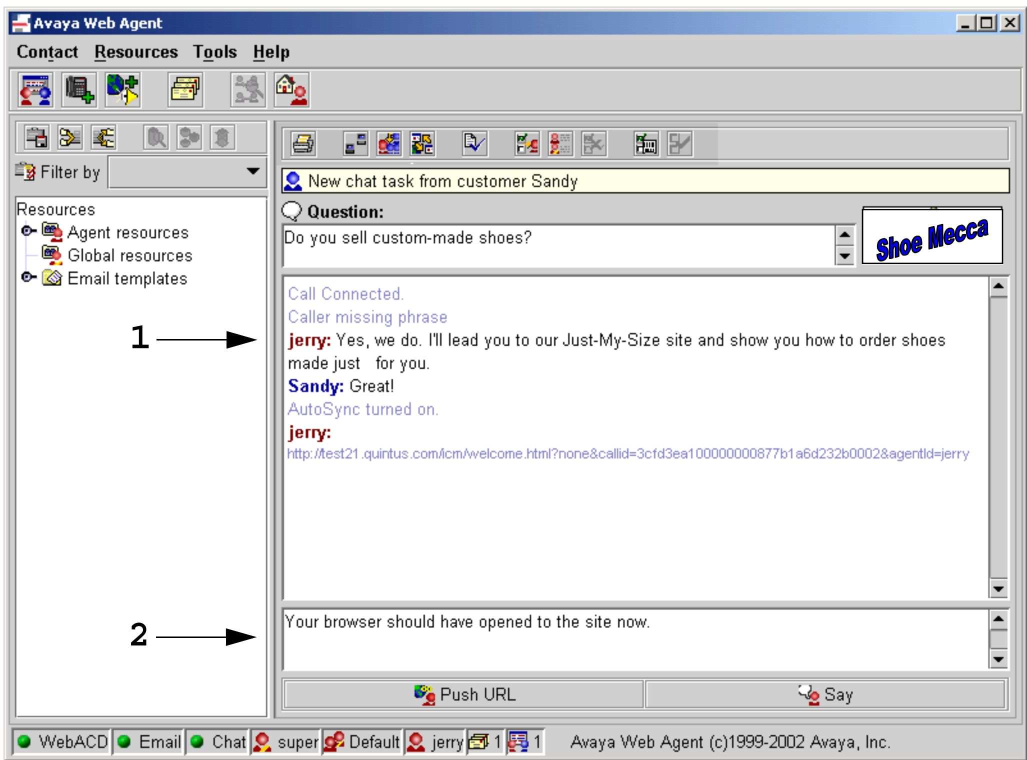
4. Read the customer's question in the scroll box above the Transcript area. If you cannot see the customer's entire question, use the scroll bar.
5. Consider whether any of the Global Resources or Agent Resources are appropriate to send to the customer.

   For information on viewing resources, see Organizing Your Resources on page 178. For information on adding resources to a chat, see Using Resources in a Chat Session on page 143.
6. Put your cursor in the Text Entry area and type a message in response to your customer's question.
7. When your message is ready, click the **Say** button or the Enter key, depending on the configuration of Avaya IC.

Note:

If the **Spell check text before a "Say"** preference is selected, your message is spell-checked after you click the **Say** button. If this option is not selected, you can click the **Spell Check** button or select **Contact > Spell Check** at any time to check a message. For information on this preference, see Setting Preferences on page 180. For more information on the Spell Checker, see Spell Checking Your Messages on page 145.

Your customer sees the message you just sent in their chat client. In the Web Agent, your message moves to the Transcript area. The message begins with your preferred name followed by a colon. For example, if your preferred name is jerry, your Web Agent may look like the following illustration:



1. **Message agent jerry sent**
2. **Message agent jerry is about to send**

When your customer replies, you see their message under yours in the Transcript area, preceded by the customer's user name.

8. Continue your conversation with the customer. Read the customer's messages. Then type and send your responses.

9. Use any of the following buttons to access other features while you are in the chat session:
   - **Print** – Prints the currently displayed chat messages to the default printer.
   - **Auto Sync** – Starts an Auto Sync session so your customer's browser displays the same Web pages as your browser while you navigate through Web pages. See Using Auto Sync on page 139 for more information.
   - **JoinUs** – Starts a JoinUs session in which friends of your customer can join the chat session. See Handling a JoinUs Conference on page 161 for more information.
   - **Sametime** – Starts a Lotus Sametime™ session with your chat customers. You can only use Sametime if it is installed and configured for both you and your chat customers. See Starting a Lotus Sametime Session on page 167 for more information.
   - **Transfer** – Displays the Unified Agent Directory (UAD) so you can transfer this chat contact to another agent or supervisor. For information, see Involving Other Agents in a Chat Contact on page 152.
   - **Chat & Phone** – Lets you talk to the customer on a regular telephone connection while still in the chat session. See Handling a Chat & Phone Session on page 147.
   - **Chat & VoIP** – Lets you talk to the customer on a telephone-Internet connection while still in the chat session. See Handling a Chat & VoIP Session on page 151.
10. When your customer is satisfied, wrap up the chat contact. Use the instructions in Wrapping Up a Chat Contact on page 170.

Sharing Browsers with a Customer

The term "Shared Browsing" refers to three features that make it possible for you and your chat customer to see the same Web pages at the same time:

- Auto Sync – When you click **Auto Sync** and then navigate through a Web site, your customer's browser follows your lead to display the same pages simultaneously.
- Page Push – You "push" a URL to your customer. Your customer sees the page displayed within their browser. The customer can push a URL to you as well.
- Collaborative Form Filling – When you share a Web page with a customer through Page Push or Auto Sync, you can help your customer fill out forms, such as registration forms, shopping cart pages, and checkout pages.

Note:

You can use the three Shared Browsing features when multiple agents are in the session. The first agent in the chat session is in charge of the Auto Sync session. All agents can push pages and collaborate on form filling.

Technical Issues with Shared Browsing

You need to be aware of the technical issues in this section so that you can explain them to your customers when necessary.

Customers Using Netscape 6.0 and Netscape 6.2.1

Chat customers who are using Netscape 6.0 through Netscape 6.2.1 cannot share browsers with you. When you try to use Auto Sync or Page Push with a customer who is using those particular versions of Netscape, the customer receives a message prompting them to install a later version.

Privacy Protection for the Customer

A customer can follow your browser when you Auto Sync but the customer cannot lead. Therefore, the customer can visit any other page or Web site, knowing that you are not watching them as they navigate.

Shared Browsing on External Web Sites

Usually when you share browsers with a customer, you and your customer are browsing your company's Web site or a Web site that your company supports. But your customer may want to show you a product on an external Web site (also called an off-domain Web site). Or you may want to show your customer a product on an external Web site to indicate that your company's similar product is better or less expensive.

However, using Shared Browsing with an external Web site can sometimes cause problems. A page may not be displayed properly on your browser or your customer's browser. Or the page you see may not exactly match the page that your customer sees. You may want to ask your supervisor or administrator if there is anything you should know about using Shared Browsing on external Web sites.

Using Auto Sync

With Auto Sync, you and your chat customer can navigate the Web together, that is, you can see the same Web pages at the same time. You are always in the lead.

When you click **Auto Sync**, any action that you perform in your browser is reflected in the customer's browser. For example, if you enter information in a form, your customer sees that information. If you follow a link, the customer's browser follows the same link.

If a customer wants to send you a page, such as information they entered on a form, they must click a **Send Page** button.

You can click a button to stop or start the Auto Sync feature at any time.

To use Auto Sync to share browsers with your customer:

1. While in a chat session, tell your customer that you are going to lead them as you navigate through some Web pages. Explain that they will see the same pages in their browser that you see in yours.
2. Click the **Internet Explorer** button in the Windows Task Bar to open the Shared Browsing browser for this customer.

   Tip:

   If you are handling two or more chat contacts simultaneously, there is an Internet Explorer icon for each customer.
3. Go to a Web page that you want your customer to see.
4. Click the **Auto Sync** button.

   The Web page in your browser is pushed to the customer. The **Auto Sync** button changes to show arrows indicating that Auto Sync is turned on. The Transcript area also states that Auto Sync was turned on.
5. Ask your customer if they can see the Web page that you just sent. Chat with your customer about the page, as appropriate.
6. If your customer wants to lead you to a different page, tell them to go to that page and click the **Send Page** button in their chat client. They can also paste the URL into the chat client and click **Send Page**.

   You see the page your customer sends you on your browser. You can also see the URL the customer typed in the Transcript area of the Web Agent.
7. Continue to share Web pages with your customer, until you satisfy their request and answer all their questions.

   Tip:

   In the Transcript area, you can see the URLs of all the pages you and your customer shared.
8. Click the **Auto Sync** button again when you want to end the Auto Sync session.

   The button changes to indicate that it is turned off. The Transcript states that Auto Sync was turned off. You can easily start another session with this customer whenever you want by clicking the **Auto Sync** button again.

   Tip:

   If you begin a chat session with another customer before you complete the chat session you are currently handling, another browser will open for the second customer.

Pushing a Web Page

At any time during a chat session, you can "push" a Web page to your customer. Your customer's browser opens to that page almost immediately.

Use this feature when you want to show your customer some information or to help your customer find a page they are looking for.

Tip:

Use Page Push when you want to show your customer a *single* page. If you want to lead your customer to a series of pages, use Auto Sync instead.

Tip:

If you send the same URL repeatedly, it is easier to create a URL resource and then send the resource any time you want. See Managing Resources on page 171 for more information.

To push a Web page to your customer:

1. Type a complete URL in the Text Entry area. It must begin with http://, https://, or ftp://.

   Example of an *in*complete URL: www.avaya.com

   Example of a complete URL: http://www.avaya.com

2. Click the **Push URL** button.

   The Transcript area shows that you have pushed a URL to your customer. Your customer sees a message in their chat client that a URL was sent to their browser. If you entered the URL correctly and the URL is currently working, the customer's browser opens to the page you pushed.

3. Verify with your customer that the page is displayed in their browser.

Using Collaborative Form Filling

Any time you are sharing browsers with your customer, you can help the customer fill in information on a Web page. This feature is called Collaborative Form Filling. A form can be a Web page or any part of a Web page where customers enter information. For example, your customer may need help entering information on the following types of forms:

- Registration form
- Shopping cart or order page
- Checkout page

When you or your customer enter information in a form that you are sharing, you both see that information immediately. Thus, you can take turns entering information. The customer must submit the information when the form is complete.

To help your customer fill in a form:

1. Verify that your chat customer wants you to help fill out a form.
2. Ask if the customer is currently viewing the form.
3. If the customer is viewing the form, ask them to click the **Send Page** button.

   The page is displayed on your browser. If the customer has entered any information, you see that information.
4. If the customer is not viewing the form and you know where the form is located, take the following steps:
   a. Go to the URL with your browser. Click **Auto Sync**.

      OR

   b. Type the URL in the Text Entry area. Click **Push URL.**

      The customer sees the page on their browser.
5. If the customer is not viewing the form and you do not know the URL, ask the customer to go to the page that contains the form. Then tell them to click the **Send Page** button.
6. Take turns with your customer, as needed, to fill out the form.

   Everything you type in the form is displayed immediately on the customer's browser. Everything your customer types is displayed on your browser as soon as the customer clicks the **Send Page** button.

   Tip:

   Take turns with your customer. If you and your customer type simultaneously, the information you enter is garbled. If this happens, ask your customer to click the **Send Page** button again.
7. Ensure that your customer clicks the appropriate button to submit the form when the form is finished.

   Tip:

   When your customer clicks the button, the page you are viewing may be different from your customer's page. In this case, ask your customer to click the **Send Page** button again.

Using Resources in a Chat Session

Resources are previously prepared text, emails, or URLs that you can send repeatedly to different customers by chat or email. Resources save you the time and tedium of typing the same things again and again. Text and email resources may contain such things as greetings, closings, and answers to frequently asked questions. Email resources may have information already entered in the **To**, **Cc**, **Bcc**, and **Subject** fields, and they may contain attachments. URL resources may be links to company Web sites, such as a page about exchange policies.

When you are in a chat session with a customer, you can send text and URL resources. Although you cannot send an entire email resource from a chat session, you can send the text of the email resource.

When a chat session is active, you see the following folders in the Resource Area of the Web Agent:

- Global Resources – Resources that your administrator or supervisor has prepared for you and other agents. All agents in the group the resources were prepared for see these resources when they log in.
- Agent Resources – Resources you create yourself for your own use. These resources are saved with your account. Other agents cannot see the resources that you create.
- Migrated Resources – You see this folder after you import migrated resources. Your administrator will inform you if you need to do this. If you do, see Importing Migrated Resources on page 179.

For information and examples of the resource types (text, email, and URL), and instructions on creating resources, see Creating New Agent Resources on page 173.

To send a text resource while in a chat session:

1. If you want to see all the resources within all folders, click the **Expand all folders** button above the Resource Area. If you want to see only the main folders, click **Collapse all folders**.

   Tip:

   To expand or collapse the contents of an individual folder, right-click the folder and select **Expand folder** or **Collapse folder**.

2. If you want to limit the resources that you see, select the type of resource you want to see from the **Filter by** drop-down menu.and select one of the following menu options:
   - [**Blank** – Displays all types of resources for all tenants and all languages.]
   - **Tenant** – Displays only the resources for a specified tenant, which may be any group in an organization, such as a company, location, or workgroup.
   - **Language** – Displays only the resources for a specified language.

- **Text resources** – Displays only text resources.
- **URL resources** – Displays only URL resources.
- **Email resources** – Displays only Email resources.

3. If you only want to view the contents of a resource, do one of the following things:
   - Select the resource and select the **Preview content** check box. A scroll box opens, displaying the resource contents.
   - Right-click the resource and select **View resource** from the pop-up menu.
4. If you want to send a text resource or the text of an email resource immediately, right-click the resource and select **Say**.

   Tip:

   You can also double-click to send a resource immediately, if Avaya IC is configured this way at your contact center. If double-clicking sends a resource to the customer, be careful not to double-click before you are ready.

   The text is sent to the customer and is also displayed in the Transcript area, preceded by your preferred name within brackets and a colon. For example, if your preferred name is JackS and you send the message "Hello" to your customer, the Transcript area displays this:

   <JackS>: Hello.
5. If you want a URL resource to open in the customer's browser, right-click on the resource and select **Push**.

   The Web page at that URL automatically opens in the customer's browser. The URL is displayed in the Transcript area of the Web Agent, preceded by your name.

   Tip:

   You can also type a URL directly in the Text Entry area and click **Push URL** to have the customer's browser open to a Web page.
6. If you want to modify a resource in the Text Entry area or add a message before sending the resource to the customer, do the following things:

   a. Right-click the resource and select **Insert** or **Insert quoted**.

   Tip:

   By default, Insert Quoted adds an angle bracket (>). This indicates to your customer that this text is different from your messages. If you want, you can change the character that is used. See Setting Preferences on page 180.

   b. Modify the text and add any new text you want to send your customer in the Text Entry area.

   c. When the text in the Text Entry area is as you want it, click **Say** to send it to your customer.

Spell Checking Your Messages

Spelling errors can make your messages difficult to read and can sometimes lead customers to misunderstand what you type. Because you want to type fast, it is difficult not to make many spelling errors in a chat session. Therefore, it is a good idea to use the Spell Checker.

A preference displays the Spell Checker whenever you click the **Say** button. This allows you to check each message before it is sent to the customer. Although it takes time to check every message, it is recommended that you turn on this chat preference and see how it works for you. See Setting Preferences on page 180.

If you prefer, you can check only those messages that you want to check, as described here.

To check the spelling of a chat message before you send it:

1. Put your cursor in the Text Entry area where you typed a message you want to check.
2. Select **Contact > Spell Check**.

   The Spell Checker is displayed.

   Tip:

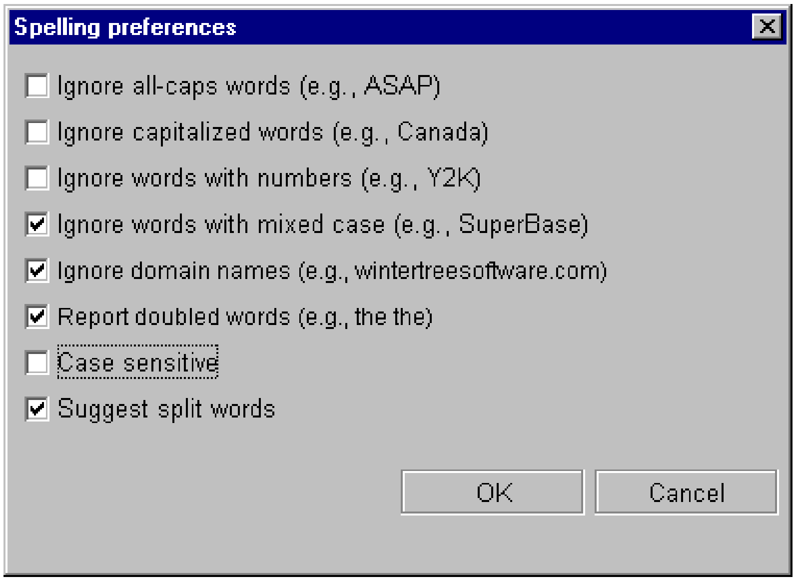
   The Spell Checker has many features, which are all labeled. To see what happens when you click a button on the right side of the dialog box, hold your cursor over the button. A tooltip describes what the button does.
3. If you wrote the message in any language other than your primary language, select that language from the **Available languages** drop-down menu.

   This action changes to the dictionary of that language.
4. If a word is displayed in the **Not in dictionary** box, look at the word to determine if you think it is spelled correctly. Look at the list of words in the **Suggestions** box to determine if any of those words is the correct spelling of the word. If so, select the word and click the **Change** button.

   Tip:

   If a word is displayed in this box, it is not included in the currently selected dictionary. However, it may be spelled correctly. For example, names of people and products are not in the dictionary. If you think that you may use a name again, click **Add** to add the name to your user dictionary.

5. You can decide at any time that you do not want the Spell Checker to check certain types of words. Click the **Options** button to bring up a dialog box like that shown in the following illustration where you can select items for the Spell Checker to ignore.



6. When you are finished checking this message, click **Cancel**.

Using the Phone in a Chat Session

While connected to a customer in a chat session, you can also speak to the customer, using what is called Voice Chat. You can use two types of Voice Chat:

- Chat & Phone (also known as Callback) – You and your chat customer speak to each other over your telephones or headsets. The customer can request this type of call from the Web site or you can initiate it from the Web Agent.
- Chat & VoIP – You speak to your chat customer over your telephone or headset. Your customer speaks to you over the Internet, using their computer's microphone and speakers. If customer requests a Chat & VoIP from the Web site, you must initiate your own VoIP session using the **Chat & VoIP** button in Web Agent.

The two types of Voice Chat may appear almost the same to you. In both types, you speak to your chat customer over your telephone. However, the VoIP call is different for customers because they speak to you over their computer's microphone and speakers, rather than a telephone. Customers using a dial-up connection to the Internet may prefer this type of call because it makes it possible for them to continue browsing the Web site as they speak to you.

In both types of Voice Chat, you speak to your chat customer in real-time, just as with an ordinary telephone call. Voice Chat can make your interaction with the chat customer faster and more satisfying for both of you than chat alone, in the following ways:

- Voice Chat is easier for customers who do not type well.
- Voice Chat is usually faster for both you and your customer because people can speak faster than they can type.
- Voice Chat makes it possible for you and your customer to hear each other's tone of voice.
- Voice Chat can combine other chat features with voice. For example, you can speak about the Web pages as you browse them together with Auto Sync.

See the following sections for information:

- Handling a Chat & Phone Session on page 147
- Handling a Chat & VoIP Session on page 151
- Involving Other Agents in a Voice Chat on page 157

Handling a Chat & Phone Session

You and your chat customer can speak to each other over the telephone while you remain in the chat session together. You can receive a chat contact with a request for this type of session or you can suggest it to a chat customer. Read the appropriate procedure, depending on whether your customer requested a Chat & Phone session or you want to suggest one to your customer.

- Responding to a Chat & Phone Request on page 147
- Initiating a Chat & Phone Request on page 149

You use the Softphone interface in the Avaya Agent to control the telephone call portion of a Chat & Phone session. For information on handling a call with Softphone, see Handling a Basic Voice Contact on page 88.

Responding to a Chat & Phone Request

When a customer requests a Chat & Phone call from the Web site, the request becomes a chat contact. If the contact is assigned to you, it is displayed in your Chat task list with a special icon to indicate that it is a Chat & Phone request. After you begin the chat session, you must connect the telephone call, as described in the following procedure.

To respond to a Chat & Phone request:

1. Double-click the Chat & Phone contact in the Chat task list.

   The Web Agent opens with this contact currently active. The Chat & Phone toolbar is displayed, as described in Voice Chat Toolbars on page 38.

   If the customer is registered or if the customer entered their telephone number from the Web site, you see their telephone number in the **Customer phone number** field.

   Tip:

   You may want to verify with your customer that this is the correct telephone number, and then make any necessary changes in the text box.

2. Type a message to the customer in the Text Entry area and click **Say** to send the message.

   For example, you may say, "Hello, Maria. I see that you want me to call you on the phone. I will call you now at the number you entered."

3. If you do not see a telephone number in the **Customer phone number** field:

   - For a customer with the Customer Chat Applet, click the **Request Phone Information** button.

     This action causes a dialog box to be displayed in your customer's chat client asking them to enter their telephone number. After the customer enters the number and clicks the **Enter** button, you see the number in the **Customer phone number** field.

   - For a customer with the Customer HTML Chat Client, ask the customer to send the phone number in a text message, and then type or copy the phone number into the **Customer phone number** field.

4. If necessary, put on your headphones.

5. Click the **Add phone request to chat** button beside the customer's telephone number.

   You hear noises as the system dials the telephone number. Then you hear the customer's telephone ring. If you need to cancel the call before it is completed, click the **Hangup** button in the Softphone.

6. When your customer answers the telephone, say "Hello" and introduce yourself as the agent who is in a chat session with them. Begin helping your customer.

   Tip:

   Because you are still in a chat session with the customer, you may also be able to do the following things while you are on this telephone call:

   - Use Auto Sync, Page Push, or Collaborative Form Filling. However, you cannot use these Shared Browsing features if your customer is using this telephone line to connect to the Internet. See Sharing Browsers with a Customer on page 138.

- Send text and URL resources to your customer. See Using Resources in a Chat Session on page 143.

7. When you are certain that the customer is satisfied, say good-bye and hang up the telephone.
8. Click the **Wrap** button in the Web Agent to wrap up the chat contact.

   The chat contact enters WrapUp state. For information on wrapping up contacts, see Wrapping Up Contacts on page 76.

   The voice contact continues until you click the **Hangup** button in the Softphone.
9. Finish speaking to the customer on the telephone. Then click the **Hangup** button.
10. Click **Wrap** to wrap up the voice contact.

Initiating a Chat & Phone Request

Any time you are chatting with a customer, you can suggest that you call them. You will remain connected with the customer in the chat session while you speak on the telephone.

Note:
Chat & Phone is sometimes called "callback."

To add Chat & Phone to a chat session:

1. Ask your current chat customer if they would like you to call them. Explain why you think that this is a good idea.

   For example, you may type, "I think it will be easier for you to explain how I can help you over the telephone. Would you like me to call you?"
2. If necessary, put on your headphones.

   Tip:
   You may want to make yourself unavailable for voice contacts in the Avaya Agent. Then you will not receive another call while you set up this Chat & Phone session.
3. Click the **Chat & Phone** button in the Web Agent.

   The Chat & Phone toolbar is displayed, as described in Voice Chat Toolbars on page 38.
4. If you do not see a telephone number in the **Customer phone number** field:

   - For a customer with the Customer Chat Applet, click the **Request Phone Information** button.

     This action causes a dialog box to be displayed in your customer’s chat client asking them to enter their telephone number. After the customer enters the number and clicks the **Enter** button, you see the number in the **Customer phone number** field.

- For a customer with the Customer HTML Chat Client, ask the customer to send the phone number in a text message, and then type or copy the phone number into the **Customer phone number** field.

Tip:

If the customer is registered or the customer entered their telephone number from the Web site, their telephone number is pre-entered. You may want to verify with your customer that this is the correct telephone number. If necessary, you can change the number in the text box or enter a new one.

5. When you know the telephone number in the **Customer phone number** field is correct, click the **Add phone request to chat** button.

   You hear noises as the system dials the telephone number. Then you hear the customer's telephone ring. If you need to cancel the call before it is completed, click the Softphone **Hangup** button.

6. When you hear the customer answer the telephone, say "Hello" and introduce yourself as the agent helping them in the chat session.
7. Help your customer with their question or problem.

   Tip:

   Because you are still in a chat session with the customer, you can also do the following things while you are on this telephone call:

   - Use Auto Sync, Page Push, or Collaborative Form Filling. However, you can only use these Shared Browsing features if your customer does not use this telephone line to connect to the Internet. See Sharing Browsers with a Customer on page 138.
   - Send text and URL resources to your customer. See Using Resources in a Chat Session on page 143.

8. Ensure that the customer is satisfied.
9. Click the **Wrap** button in the Web Agent to wrap up the chat contact.

   For information, see Wrapping Up a Chat Contact on page 170.

   The voice contact continues until you click the **Hangup** button in the Softphone.

10. Finish speaking to the customer on the telephone. Say good-bye when you are ready to hang up. Then click the **Hangup** button.
11. If you see the **Wrap-up** dialog box or a Prompter script, wrap up the voice contact.

    For information, see Wrapping Up Contacts on page 76.

Handling a Chat & VoIP Session

Many customers who are browsing your company's Web site cannot use their telephone while they are connected to the Internet. If they have a question, they can click a **Chat & VoIP** button so they can continue browsing the Web site as they speak to an agent. If you are enabled to receive this type of contact, this request may be routed to you and appear in your Chat task list. You must initiate the Chat & VoIP feature from the Web Agent.

Note:

Customers must meet certain requirements to be able to engage in a voice chat session with you. When a customer requests a VoIP call, the Avaya IC software sends a dialog box to the customer. The customer can click the **Run Test** button to determine if their computer meets all the requirements. If the customer's computer is unable use VoIP, the customer receives an error message that explains the problem, and Avaya IC offers to submit a regular text chat request for that customer.

After you connect to your chat customer through VoIP, you will speak to the customer over your telephone.

To respond to a VoIP request:

1. Click the Chat & VoIP contact in your Chat task list.

   The Web Agent opens in the VoIP mode. You will see the Chat & VoIP toolbar.

2. Type a message to the customer in the Text Entry area and click **Say** to send the message.

   For example, you may say, "Hello, Maria. This is John at XYZ Tech Support. I see that you want me to call you with VoIP. Are you familiar with VoIP calls?"

3. If the customer is not familiar with this type of call, ask them to ensure that the following statements are true:

   - They are using the Windows operating system.
   - They are using one of the following Internet browsers:
     - Internet Explorer 5.x or 6.x
     - Netscape 7
   - Speakers, microphone, and sound card on their computer exist. The speakers are turned on and the microphone is plugged in to the computer.
   - Their audio device is not already in use, such as playing music.

4. If necessary, put on your headphones.

5. Look at the **Voice** channel button in the Avaya Agent. If the button has a yellow *X*, click the button to make yourself available.

6. Click the **Initiate VoIP request** button. The customer’s chat client and your Web Agent show the status as the connection is made.
7. When the status message informs you that the connection was made, say "Hello" and ask if your customer can hear you.

   Tip:

   If the connection breaks during the session, you receive a message to help the customer troubleshoot the problem.
8. Help your customer with their original question or problem.

   Tip:

   Because you are still in a chat session with the customer, you can use the following features in this VoIP call:

   - Share browsers with the customer, using Auto Sync, Page Push, or Collaborative Form Filling. See Sharing Browsers with a Customer on page 138.
   - Send text and URL resources to your customer. See Using Resources in a Chat Session on page 143.
9. When the customer is satisfied, say good-bye and then click the **Hangup** button in Softphone.
10. Click the **Wrap** button in the Web Agent to wrap up the Chat & VoIP contact.

    The chat contact and the VoIP contact are both wrapped up as a single contact. Your customer’s chat client informs them that the session is finished.

Involving Other Agents in a Chat Contact

At certain times during a chat session, you may need help answering your customer’s questions or you may need to transfer the chat contact to an agent in a different workgroup. At these times, you can either consult with another agent while the customer is on hold, or you can conference another agent into the chat so that both of you can talk to the customer. If you conference in a second agent, you can also leave the chat contact and let the second agent finish working with the customer while you go on to other tasks. (In effect, this transfers the chat contact to the other agent.)

Note:

For information about adding agents to a Chat & Phone or Chat & VoIP session, see Involving Other Agents in a Voice Chat on page 157.

You can also add multiple agents to the chat by conferencing in each agent individually. Each agent can stay in the chat session or leave it whenever they want by completing the contact. The chat session remains active until the last agent completes the contact.

Just as you can request that another agent become involved in your chat contact, so can another agent or supervisor request that you become involved in their chat contact. When this happens, you must wrap up the joint contact just as you would a contact that you handled by yourself.

If you want to involve another agent with a particular skill, you can do one of the following:

- Use the **Find** option in the UAD to find a specific skilled agent. then conference that agent into the chat contact, as described in Conferencing Another Agent into a Chat Contact on page 153.
- Transfer the chat contact to another agent, as described in Transferring a Chat Contact to Another Agent on page 154.
- Transfer the chat contact to a queue that includes all agents with the needed skill, as described in Transferring a Chat Contact to a Queue on page 155.
- Conference the chat contact to a queue that includes all agents with the needed skill, as described in Conferencing a Chat Contact to a Queue on page 156.
- Cancel the transfer or conference of a chat contact before it connects to another agent, as described in Cancelling the Transfer or Conference of a Chat Contact on page 157.

Unlike a blind transfer, when you transfer or conference a chat contact to a queue, you are not dropped from the chat contact immediately when you initiate the conference. You can stay in the chat conference room until a second agent receives the contact from the queue.

Conferencing Another Agent into a Chat Contact

To conference another agent into a chat contact:

1. Tell your chat customer that you are going to find another agent who can help them.
2. Click the **Conference current contact** button in the Web Agent.

   The UAD's **Select Destination for Conference/Transfer** dialog box is displayed.

   If the dialog box has an **Agents** tab, that tab is selected. If it has a workgroup tab, you can use that tab for your search.
3. If the agent you are looking for may be in a different location or workgroup, click the **Site** drop-down menu to make another selection. Or select **All Sites** to include all locations and workgroups.

   Tip:

   If you are not certain about the login ID of the agent to whom you want to transfer the chat session, right-click the agent's name. Then click the **Properties** pop-up menu. A dialog box with information about this agent is displayed.

4. Navigate through the folders as necessary until you find the agent you want for the transfer. Click the name of the agent.

   The name you selected is displayed in the **To** field.

5. If you want to send a comment to the agent, put your cursor in the **Comment** field and type your message.

6. Click **OK**.

   A dialog box will inform you if the agent is unavailable.

   If available, the agent is connected to the session. The Transcript area announces that this agent has arrived.

7. Chat with the customer and with the agent, reading their messages in the Transcript area and replying in the usual way.

   All messages you, the other agent, and the customer send are displayed in your Transcript area. The customer and the other agent see all messages as well.

8. If you want to add another agent to the conference, repeat the above steps. You can stay in the Conference session with both agents and the customer as long as you want.

9. Whenever you decide to leave the session, inform the others that you will leave and say good-bye. Then you can drop out of the session by wrapping up the contact as usual. If you need instructions, see Wrapping Up a Chat Contact on page 170.

   You are dropped from the chat session. The agent to whom the contact was transferred continues to chat with the customer.

   Note:

   Each agent can drop out of the chat session whenever they want. The chat session continues until the last agent in the session wraps it up.

Transferring a Chat Contact to Another Agent

When you transfer a chat contact to another agent:

1. The receiving agent joins the chat conference room.
2. You are automatically dropped from the chat conference room.

To transfer a chat contact to another agent:

1. Tell your chat customer that you are going to find another agent who can help them.
2. Click the **Transfer current contact** button in the Web Agent.

   The **Select Destination for Conference/Transfer** dialog box of the Unified Agent Directory is displayed.

3. In the **Select Destination for Conference/Transfer** dialog box, select the **Agent** tab.
4. If the agent you need is in a different location:
   - Select the desired site from the **Site** drop-down menu.
   - Select **All Sites** from the **Site** drop-down menu to view agents in all locations.
5. Navigate through the list of queues until you find the agent you want for the transfer, then select the name of the agent.

   Avaya Agent displays the agent you selected in the **To** field.

   Tip:

   If you are not certain about the login ID of the agent to whom you want to transfer the chat session, right-click the agent's name. Then click the **Properties** pop-up menu. A dialog box with information about this agent is displayed.
6. To send a comment to the agent who receives the chat contact, type your message in the **Comment** field.
7. Select **OK**.
8. Continue to chat with the customer until the agent is available and the chat is transferred to that agent.
9. As soon as the second agent joins the chat conference room, Avaya IC drops you from the conference room.
10. When you leave the chat conference room, you enter the WrapUp state. Wrap up the chat session as described in Wrapping Up a Chat Contact on page 170.

Transferring a Chat Contact to a Queue

When you transfer a chat contact to a queue:

1. The receiving agent joins the chat conference room.
2. You are automatically dropped from the chat conference room.

To transfer a chat contact to a queue:

1. Tell your chat customer that you are going to find another agent who can help them.
2. Click the **Transfer current contact** button in the Web Agent.

   The **Select Destination for Conference/Transfer** dialog box of the Unified Agent Directory is displayed.
3. In the **Select Destination for Conference/Transfer** dialog box, select the **Queues** tab.

4. If the queue you need is in a different location:
   - Select the desired site from the **Site** drop-down menu.
   - Select **All Sites** from the **Site** drop-down menu to view queues in all locations.
5. Navigate through the list of queues until you find the queue that includes agents with the needed skills, then select the name of the queue.

   Avaya Agent displays the queue you selected in the **To** field.
6. To send a comment to the agent who receives the chat contact from the queue, type your message in the **Comment** field.
7. Select **OK**.
8. Continue to chat with the customer until an agent is available and the chat is transferred from the queue to that agent.
9. As soon as the second agent joins the chat conference room, Avaya IC drops you from the conference room.
10. When you leave the chat conference room, you enter the WrapUp state. Wrap up the chat session as described in Wrapping Up a Chat Contact on page 170.

Conferencing a Chat Contact to a Queue

When you conference a chat contact to a queue:

1. The receiving agent joins the chat conference room.
2. You can talk to the receiving agent before you leave the chat conference room.

To conference a chat contact to a queue:

1. Tell your chat customer that you are going to find another agent who can help them.
2. Click the **Conference current contact** button in the Web Agent.

   The **Select Destination for Conference/Transfer** dialog box of the Unified Agent Directory is displayed.
3. In the **Select Destination for Conference/Transfer** dialog box, select the **Queues** tab.
4. If the queue you need is in a different location:
   - Select the desired site from the **Site** drop-down menu.
   - Select **All Sites** from the **Site** drop-down menu to view queues in all locations.
5. Navigate through the list of queues until you find the queue that includes agents with the needed skills, then select the name of the queue.

   Avaya Agent displays the queue you selected in the **To** field.

6. To send a comment to the agent who receives the chat contact from the queue, type your message in the **Comment** field.
7. Select **OK**.
8. Continue to chat with the customer until an agent is available and the chat is moved from the queue to that agent.
9. When the second agent joins the chat conference room, you can either:
   - Stay in the chat conference room and continue to participate in the chat session
   - Leave the conference room

   Note:
   You cannot send private messages to the second agent in the conference room.
10. When you leave the chat conference room, or when the customer leaves the chat conference room, you enter the WrapUp state. Wrap up the chat session as described in Wrapping Up a Chat Contact on page 170.

Cancelling the Transfer or Conference of a Chat Contact

You can cancel a transfer or a conference of a chat contact at any point until the other agent accepts the chat contact.

To cancel the transfer or conference of a chat contact:

1. Click the **Cancel Transfer/Conference request** button in the Web Agent.
2. Click **OK** in the message box.
3. Advise customer that you have cancelled the transfer or conference request.

Involving Other Agents in a Voice Chat

When you are in a Voice Chat session with a customer (either Chat & Phone or Chat & VoIP), you may want to add one or more agents into the Voice Chat, or you might want to transfer the Voice Chat to another agent.

Note:
A Voice Chat has two media channels, Chat and Voice. If you want to involve another agent in the contact, that agent must be available to take both the chat session and the voice call.

When you involve other agents in a Voice Chat, there are some differences from working with a text chat session. For example, the dialog box that is displayed when you click the **Conference** button is called In the **Select Destination for Conference** dialog box, be sure to enter the agent's name in the **To** field before you click the **OK** button. Otherwise, a message says **Destination Busy** and you cannot transfer the contact.

You can use the Softphone buttons to:

- **Conference** – Includes another agent in the contact with yourself and the customer.
- **Consult** – Lets you talk to the other agent while the customer is on hold before you transfer the contact to that agent.

Note:

You cannot use the **Transfer** Softphone button for a Voice Chat. If you want to send a Voice Chat to another agent, you must use the Consult feature so that you can be sure the other agent is available for both the chat and voice portions of the contact.

For more information about the Softphone buttons, see Using the Phone Task List and Softphone on page 82.

To add another agent to a Voice Chat:

1. While in a Chat & Phone or Chat & VoIP session with a customer, click the Softphone **Conference** button.

   The UAD's **Select Destination for Conference** dialog box is displayed.

2. Select the agent that you want to conference in to the voice chat. (For details, see Involving Other Agents in a Chat Contact on page 152.)

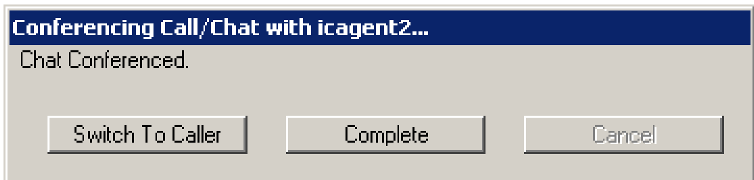
   Once you have selected an agent, the system tries to connect the voice portion of the voice chat with the agent you selected, and displays the status of the connection in the Conferencing Call/Chat dialog box, as shown below.

   When the other agent has been contacted and the voice call has been connected, the Conferencing Call/Chat dialog box shows the status **In Call** and enables the **Send Chat** button. At this point, you and the agent you just added can talk with each other over the phone, but the other agent has not yet been added to the chat and cannot speak to the customer over the phone.

Tip:

If you want to tell the customer that the conference is almost complete, you can click the **Switch to Caller** button. The status changes to **Connected with Caller**, and you can now speak to the customer over the phone. If you want to go back to the other agent, click the **Switch to Destination** button.

3. Click the **Send Chat** button to send the chat to the other agent. When the other agent has been conferenced into the chat, the status changes to **Chat Conferenced**, as shown below.



At this point, you, the customer, and the agent you just added can all view and participate in the chat, and you can speak to the other agent, or the customer, over the phone. The other agent, however, cannot yet speak to the customer over the phone.

4. To conference everyone in to the voice call as well as the chat, click the **Complete** button. At this point, anything you say on the phone will be heard by both the other agent and the customer.

To consult with another agent before transferring the Voice Chat:

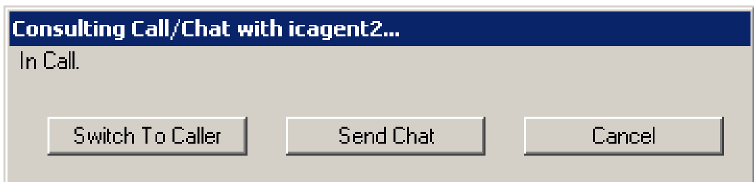
1. While in a Chat & Phone or Chat & VoIP session with a customer, click the Softphone **Consult** button.

   The UAD's **Select Destination for Consult** dialog box is displayed.

2. Select the agent to whom you want to transfer the voice chat. (For details, see Involving Other Agents in a Chat Contact on page 152.)

   Once you have selected an agent, the system tries to connect the voice portion of the voice chat with the agent you selected, and displays the status of the connection in the Consulting Call dialog box.

   When the other agent has been contacted and the voice call has been connected, the Consulting Call dialog box shows the status **In Call** and enables the **Send Chat** button, as shown below.

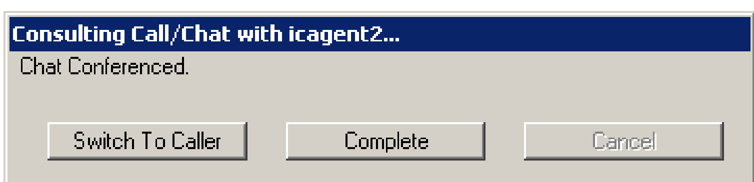


   At this point, you and the agent you just added can talk with each other over the phone, but the other agent cannot enter the chat with the customer or speak to them over the phone.

   Tip:

   If you want to tell the customer that the consultation is almost complete, you can click the **Switch to Caller** button. The status changes to **Connected with Caller**, and you can now speak to the customer over the phone. If you want to go back to the other agent, click the **Switch to Destination** button.

3. Click the **Send Chat** button to send the chat to the other agent. When the other agent can see the chat log, the status changes to **Chat Conferenced**, as shown below.



   At this point, you, the customer, and the agent you just added can all view and participate in the chat, and you can talk to either the agent or the customer on the phone.

4. To transfer the contact to the other agent, click the **Complete** button. Avaya Agent takes you out of the chat and transfers the customer's voice call to the other agent's phone line. At this point, you can wrap up the contact as you normally would while the new agent handles the customer's issues.

Handling a JoinUs Conference

You may occasionally have a customer who would like to invite one or more others to join the chat session. This type of session is called a JoinUs Conference.

To create the JoinUs Conference, you first create a JoinUs handle (user name). You send this handle with a special URL, given in step 6 of the following procedure, to anyone who is going to enter the JoinUs session. These people go to the URL and enter the handle. You can then all share browsers and type messages to each other about what you see.

For example, say that you have a customer who is thinking about buying an item on the company Web site but wants the advice of his wife before making a decision. You suggest that his wife join the session and he agrees. You follow the instructions below to create the handle and to convey the URL and instructions to your customer's wife. She then goes to that location and enters her handle. The chat client opens on her desktop. Now the three of you can exchange chat messages in a three-way session.

The following instructions explain how to have a person of your customer's choice join a conference. In the instructions, the person is called a "friend," but of course it may be a spouse or an acquaintance. If your customer wants more than one person to join, repeat the instructions as needed.

Before you begin, ask your administrator for the URL of JoinUs conferences.

To handle a JoinUs conference:

1. Chat with your customer about having someone they know join the chat session. Note that these instructions refer to this person as your customer's "friend."
2. Explain to your customer that their friend must go to a specific Web address (URL) and enter a specific user name, which is called a "handle". Explain that you must give their friend the URL and handle they need to join the chat. Ask which of the following methods the customer prefers:
   - You send the information to your customer and the customer passes it on to their friend.
   - You send the information to your customer's friend through the friend's email account.
   - You call your customer's friend on the telephone and give them the information.
3. Ask your customer to send the friend's email address or telephone number, as appropriate.
4. Click the **JoinUs** button in the Web Agent window.

   The **JoinUs** dialog box is displayed.
5. Enter a handle for the customer's friend.

Tip:

Write down the handle and the friend's name in case you forget them later.

6. Whether by email or telephone, tell the friend the URL and the handle for the JoinUs Conference, as follows:

   a. Unless your administrator has changed it, the URL is website\public\joinus.jsp.

   b. Tell the friend to enter the handle in the appropriate field when their browser has finished loading the JoinUs Web site.

   Note:

   If the JoinUs Web site asks for a password, the friend should leave that field blank.

   c. After they enter their handle, they should click the **Submit** button.

   When the friend does this, the JoinUs program is downloaded to their browser. You, your primary customer, and your customer's friend are in the same chat room. You can each see what the other two people type.

7. Manage the JoinUs conference as appropriate. Use Auto Sync or push URLs to your customer and their friend. Watch your browser as they send pages to you and each other.

   Tip:

   You may want to tell your customer and friend how to lead the others to a Web page. They can go to the page or paste the URL in the URL box of their chat client, and then click the **Send Page** button.

   Note:

   If your customer or their friend closes their browser or clicks the **End Chat** button, the session continues between you and the other person.

8. When your customer and their friend indicate that they are finished, tell them that you will close the session. Say good-bye.

9. Wrap up the JoinUs session.

Handling Simultaneous Chat Sessions

You can handle more than one chat session at the same time. For example, you may chat with a new chat customer while your other chat customers are reading material you sent them or trying your suggestions.

Tip:

If you plan to handle multiple sessions, it is a good idea to set the "Away from Desk" message. The "Away from Desk" message is sent to the customer whenever you do not respond within a period of time you specify. This is a preference and is described in Setting Preferences on page 180.

To handle simultaneous sessions with multiple customers:

1. Ensure that you are available for the number of simultaneous sessions you want to handle. For information, see Changing Your Agent State on page 51 and Setting Your Channel Loads on page 55.
2. While handling a chat session, double-click the name of another customer from the Chat task list. Usually you should select the next contact from the top.

   The Web Agent changes to display your chat session with the new customer. An icon for a new Internet Explorer browser is added to the Windows Task Bar, beside the icon for your previous chat customer.
3. Type and send a message to the new customer.
4. Whenever you have a chance to return to the original customer, click that customer’s contact in the Chat task list.

   The Web Agent changes to display information about this contact, including the transcript of your previous conversation.
5. If your current chat contact load allows you to handle more chat customers and you want to add another, repeat Steps 2-4. Your contact load for chat is the maximum number of chat contacts you can handle simultaneously. This number, which can change during your login session, is displayed in the chat icon at the bottom right of the Web Agent.

   Tip:

   If one of your chat customers needs more attention, you can click the **Transfer** button and transfer that contact to another agent.
6. Return to interact with your other customer by clicking the name in the Chat task list.

Tip:

You can double-click any currently *active* contact in the Chat task list to have the Web Agent window display that chat session.If you are handling multiple contacts simultaneously, the logo in the Web Agent window may change when you select a different contact from the Chat task list. This can help you distinguish between different customers quickly.

Tip:

You can use the Shared Browsing features with each chat contact. Use the Internet Explorer icons in the Windows Task Bar to switch between the browsers.

7. When you are finished with any of the chat customers, select the name from the Chat task list. Wrap up and close this session as usual. See Sharing Browsers with a Customer on page 138.

   The other chat sessions remain active until you wrap up and close them.

Monitoring a Chat Session (*Supervisors Only*)

If you are a supervisor, one of the most important ways that you can ensure quality is to monitor your agents' chat sessions. You can enter a chat session and "view" the interaction between the agent and the customer in real time. You can also have other supervisors join you in observing an agent.

Note:

Before you can monitor an agent, you must be designated as the supervisor of at least one of the agent's workgroups. For details about setting up workgroups, see *IC Administration Volume 2: Agents, Customers, & Queues*.

When you first enter the chat session, neither the agent nor the customer can see you. You can become visible by selecting the **Make Visible** option and "speaking." When you are visible, both the agent and the customer can also see you if you leave.

If you want to monitor a session without anyone knowing you are there, you can leave yourself Invisible. This makes it possible for you to observe natural interactions for training purposes. It also helps ensure that your agents perform well because they know that you may monitor them at any time.

To monitor a chat session:

1. To give your full attention to monitoring a chat session, you can set your availability for voice, chat, and email to 0 in Avaya Agent.

   Tip:

   If you prefer to monitor while you handle a chat session of your own or reply to an email, you can do this. Use the Chat Management and Email Management buttons in the main toolbar to switch between contacts, as desired.

2. Click the **Supervisor Mode** button in the main toolbar of the Web Agent.

   If you have not participated in or monitored a chat session since you last logged in, the **File Download** dialog box is displayed. It asks you to choose what to do with the aimagentcl.hta file. This dialog box appears the first time you begin to handle a chat contact or monitor a chat session during your login session. It does not appear again until the next time you log in and begin to interact with a chat customer or monitor an interaction.

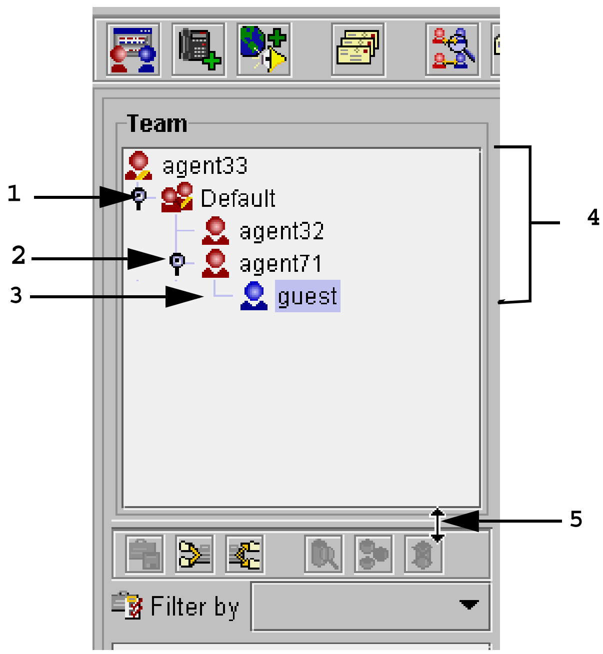
   CAUTION:

   The aimagentcl.hta file is necessary for Shared Browsing. The file causes a separate Internet browser to open for each session that you participate in or monitor. If you do not plan to use Shared Browsing in sessions that you monitor, you may want to select the "Start collaboration automatically when monitoring a chat session" preference. When this preference is selected, a browser and an icon do not appear for each session. See Setting Preferences on page 180 for more information.

3. If the **File Download** dialog box is displayed, click **Open this file from its current location**. Then click **Open**.

   An Internet Explorer icon is added to your Windows Task Bar. This is the browser you will use if you monitor a chat session in which the agent and customer share browsers.

   A Monitoring panel is added to the Web Agent above the Resource area. It displays a tree showing your workgroup, the agents who are in chat sessions currently, and the customers with whom they are chatting, as shown in the following illustration.



1. Workgroup
2. Agent
3. Chat customer
4. Current chat sessions
5. Arrow used to increase or decrease the size of the Monitoring panel.

Tip:

To expand the window and see more of this tree, hold your cursor over the bottom edge of the Monitoring panel. When you see a small, double-headed arrow, drag the edge of the panel down, as far as you want. You can drag the edge back in similar manner.

4. Click the magnifying glass icon next to the agent whose chats you want to monitor to see what chats that agent is currently engaged in. Click on any customer name under that agent to monitor that chat.

   A transcript of the current session is displayed in the Transcript area of the chat window.

Note:

By default, when you begin monitoring, you are invisible to the agent and to the customer you are monitoring. You cannot type in the Text Area unless you make yourself visible.

5. If you want to become visible, right-click the name of the customer. Then select **Make Visible**.

   In the Transcript area, the system announces your presence. A line says **Supervisor is available on the call**.

   Tip:

   If you make yourself visible, remember to make yourself invisible again before monitoring another session.

6. If you want to become invisible again, right-click the name of the customer. Then select **Make Invisible**.

   The system announces that you are not available. However, you can continue monitoring the session without typing messages.

   Note:

   If you click another chat session, the system announces that you left the first session. You can only monitor one session at a time.

7. To end your monitoring session without switching to another session, click the **Supervisor Mode** button or click an icon at the root level in the Monitoring panel.

Starting a Lotus Sametime Session

Lotus Sametime™ is a real-time collaboration program that is integrated into Avaya IC. If your administrator indicates that you are to use Sametime, you can start a Sametime session with your current chat customers. With Sametime, you can share applications, use a white board, and share audio and video with the customer.

If you want to use Sametime with multiple customers, start a JoinUs session as explained in Handling a JoinUs Conference on page 161. Then begin the Sametime session. Sametime may not work if a JoinUs customer enters a Sametime session that has already begun.

Note the following points:

- Sametime must be installed and configured on your desktop.
- You need a login ID and password, assigned to you by your administrator.
- You must be in a chat session with the customer or customers that will join you in a a Sametime session.
- You must log in to Sametime to begin the session. After you log in, your customers can join you in the session.
- Other agents may not be able to join the Sametime session.

For more information about Sametime, see the Sametime user guide.

To begin a Lotus Sametime session:

1. Ensure that the person you are chatting with has Lotus Sametime installed and wants to join you in a Sametime session.
2. Click the **Sametime** button.

   A browser opens with a drop-down menu of services.
3. Select the type of service you want.
4. Enter your Sametime login ID and password.

   Your customer's browser and your browser connect in a Sametime session.
5. See the Sametime help system for information on handling the session.
6. You can end the Sametime session at any time. Simply close the browser that you were using for the Sametime session.

Viewing Customer DataWake Records

A DataWake™ record is a list of URLs (Web pages) that customers have recently navigated. Your administrators set up the Web pages that can be listed in DataWake records.

Some URLs that the customer has visited may not appear in the customer's DataWake. Your administrators determine which URLs can be included in DataWake records.

To view a customer's DataWake record:

1. Display a contact in the Web Agent.

   Note:

   When you are not handling a chat contact, the DataWake option is disabled.
2. Select **Tools > DataWake**.

   Your Internet browser opens to the customer's DataWake Summary page. The DataWake record may the following columns:

   - **Time** – The time of day when the customer accessed the page.
   - **Priority** – The significance of a particular URL accessed by the customer, as defined by your administrator in IC Manager.

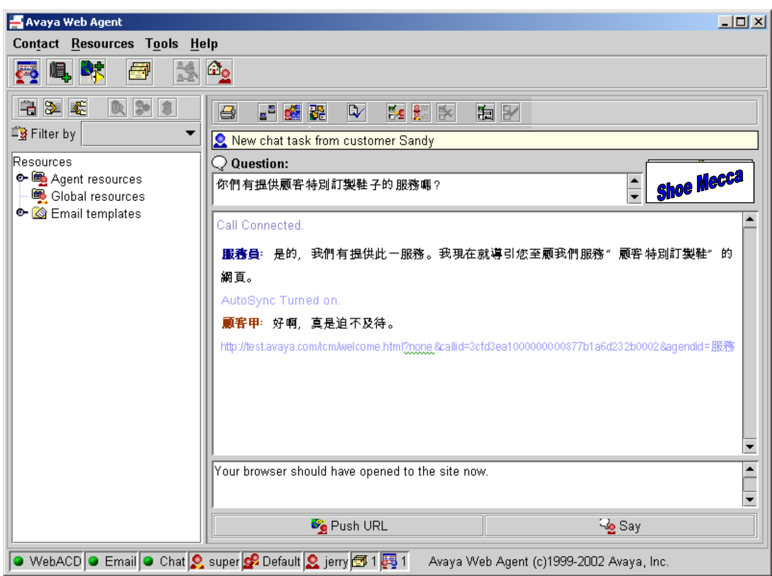
- **Type** – Pages are classified as either escalation pages or browse pages. Escalation pages are pages from which a customer can send an email or request a chat session. Browse pages are all other pages in the DataWake database.
- **Description** – The URL of the page. You may be able to click the URL to access the page in your browser.

Using Multiple Languages in Chat Sessions

Your customer may want to chat with you in a language that is not your primary language. If you are assigned a chat contact in another language and the language is not displayed properly, check with your administrator.

You can spell check your chat messages in a secondary language before you send them. When you open the Spell Checker (select **Contact > Spell Check**), select the appropriate language from the **Language** drop-down menu.

In the following illustration, an agent is chatting with a customer in Chinese:



Tip:

If you use another language, you may want to create some Agent Resources in that language. See Managing Resources on page 171.

Wrapping Up a Chat Contact

When you finish interacting with a customer in a chat session, you wrap up the session. When you click the **Wrap** button, you enter the WrapUp state. While in WrapUp state, you cannot receive another chat contact to replace this one. You may be required to enter information about the chat session while in this state.

Note:

In certain cases, you may not see a **Wrap-up** dialog for any of the following reasons:

- The chat contact was removed because you did not respond in the allotted amount of time.
- Your supervisor removed the chat contact to put it back in a queue.
- The chat contact was cancelled in the server.

To wrap up a chat contact:

1. Ensure that you have addressed all your customer's questions or problems and that the customer understands that the session is about to end. Say thank you and good-bye.
2. Click the **Wrap** button in the chat toolbar.
3. If you see a dialog box asking you to confirm your action, click **Yes**.

   A **Wrap-up** dialog box may be displayed for you to fill in information about this contact. Or you may see a Prompter script displayed in the Avaya Agent.

   Tip:

   You can set a preference to control whether this dialog box is displayed when you wrap up a chat contact. See Setting Preferences on page 180.
4. If you see a dialog box or a Prompter script, answer all the questions appropriately. For information about the dialog box or the script, see Wrapping Up Contacts on page 76.

   When you have completed all the wrap-up tasks, the chat contact is removed from your Chat task list.

Chapter 6: Performing Chat & Email Tasks

This chapter explains how to perform tasks related to email or chat that you generally perform when you are not actively handling an email or chat contact.

The chapter includes the following topics:

- Managing Resources
- Importing Migrated Resources
- Setting Preferences

Managing Resources

Resources are previously prepared text, emails, and URLs (Internet addresses) that you can send to customers whenever the information is needed. This saves you the time and the tedium that it would take to type the same information repeatedly. For example, text resources may consist of boilerplate text and small pieces of text that you can use in your chat sessions, such as common phrases, greetings, closings, and answers to questions you receive frequently. Email resources may contain answers to commonly asked questions and may contain attachments. URL resources may lead your customer to corporate Web sites, such as a page on exchange policies.

Your administrator may have prepared "global" resources for you and other agents to use. You cannot change or delete global resources, unless you are an administrator. However, you can create agent resources for your own use. No one else can see your agent resources.

When you respond to email, you may also have a list of "Suggested Responses" in your Resource Area. These are temporary resources related to an email contact. For more information, see Using Suggested Responses on page 109.

This section contains the following topics:

- Resource Types and Examples
- Creating New Agent Resources
- Creating New Global Resources (Supervisors Only)
- Editing Your Resources

- Viewing Your Resources
- Organizing Your Resources

For information on sending resources to a customer, see Using Resources in a Chat Session on page 143 or Using Resources in Email on page 107.

Resource Types and Examples

Global and agent resources come in three types: email, text, and URL. This section explains each type and gives an example.

Email

An Email resource contains the subject and text of an email message that you can use to respond to customers quickly. You can add an attachment to this message as well. When you send the resource to a customer, you can add to or modify the message as needed.

For example, you could create an email resource to respond to a question customers frequently ask about the safety of a product.

Text Files

You can use text files to store "canned" or "boilerplate" greetings and responses. This saves you time and tedium when you are responding to email or when you are engaged in a chat session. You can add to or modify the message before you send it to a customer.

For example, You could create a "Welcome" text file containing text like the following:

```
Hello. Welcome to XYZ support. My name is Joe, and I am here to
  assist you.
```

URLs

A URL resource is a resource that contains a linked address to a Web site. When you send this resource to a customer in a chat session with you, the customer’s browser opens to display that Web site. In most email programs, if you send the resource to an email customer, the customer’s browser opens to the Web site when they click the URL.

Example:

A URL resource named "Shopping Mecca Catalog" might be

`http://www.shoppingmecca.com/catalog/`

Tip:

You can use a File Transfer Protocol (FTP) site as a URL resource, so that customers can go to the site to download files. When you create such a URL, begin it with `ftp://`.

Example:

A URL resource named "XYZ ftp site" could take the customer to an ftp site at your company. The contents of the URL resource might look like the following:

```
ftp://ftp.XYZsupport.com/special
```

Creating New Agent Resources

You can create your own resources and store them in the Agent Resources folder. These are saved with your user account and are available to you whenever you log in. Other agents cannot see or use the resources you create.

You can create resources for specific tenants. A tenant may be a company, such as XYZ Corp; a location, such as New York or Boston; or a workgroup, such as Sales or Support. You can create resources in different languages, which is useful if you interact with customers in more than one language.

If you need to, you can edit a resource just before you send it to a customer. This makes it possible for you to adapt the prewritten resources to meet your customer's individual needs.

Tip:

You can drag and drop a copy of any resource to a new location. For example, you can copy a resource in your Global Resources folder into your Agent Resources folder. Then you can modify the copied resource if you want. In some cases, this is faster than creating a new resource from the beginning.

To create a resource:

1. Right-click the Agent Resources folder or any of its subfolders in the Resource Area of the Web Agent.
2. From the pop-up menu, select **Create resource** and the type of resource you want to create. For information on each type of resource, see Resource Types and Examples on page 172.

   The **New resource** dialog box is displayed, with your Login ID and today's date and time already entered. This read-only information will be displayed as a tooltip when you hold your cursor over this resource.
3. If you want to create the resource for a specific tenant, select that tenant from the **Tenancy** drop-down menu.

4. If you want to create the resource in a language other than your primary language, select the language from the **Language** drop-down menu.
5. Enter a unique name to identify this resource in the **Name** field.
6. Follow the step below that applies to the type of resource you are creating:

Resource	Notes
URL resource	Type the entire URL, beginning with `http://`, `https://`, or `ftp://`. Do not type any text other than the URL. If you do not begin the address correctly, you will not see an error message at this time. However, you will see an error message when you try to send it to a customer. If you send a URL with an incorrect address, the customer who receives it will see an error message when their browser attempts to locate the Web site. **Tip:** When creating a URL resource, you can copy a URL from your browser and paste it into a resource. Select the entire address from the browser's Location or Address box and click Ctrl-C. Put your cursor in the scroll box of the **New resource** dialog box and click Ctrl-V. The URL is pasted into the dialog box.
Text resource	Type the message that you want customers to see.

<table>
<tr><th>Resource</th><th>Notes</th></tr>
<tr><td>Email resource</td><td>Fill in the fields as follows:
To – You should probably leave this field blank. Your current customer’s address will be filled in here automatically each time you send this resource.
Cc – Enter addresses here that you want be entered in the Cc field of emails using this resource. In this way, you can inform someone in your company that a customer is seeking help on this topic.
Bcc – If you want another person or persons to receive a copy of this email whenever you send it to a customer, but you do not want your customers to see the address or addresses, enter the email address or addresses here.
Subject – Type the subject of this email so customers who receive an email from this resource can see what the email is about before they open it.
Tip: Click the buttons beside the To, Cc, and Bcc fields to look up the email addresses of other employees of your company or External Agents in the Unified Agent Directory (UAD). See the description of the fields below. When you find the name of a person you want to add to the field, double-click the name.

If you want to attach a file or files:
Click the Attachments tab and then the Add Attachments (paper clip) button.
Use the drop-down menu and the buttons at the top of the Open dialog box to locate a file you want to attach. The file can be on your local hard drive or on any drive on the network to which you have access.
Click on the file you want to add and then click Open.
If you want to attach more files, click the Add Attachments button again.
Click OK.</td></tr>
</table>

7. Read carefully everything that you have entered in the **New resource** dialog box.

Tip:

To spell check your resource, select the text that you have entered and click Ctrl-C to copy it. Then select **Tools > Compose new email**. Put your cursor in the Text Composition Area of the email and click Ctrl-V to paste the text. Click the **Spell Check** button from the email toolbar and run the Spell Checker. After you correct any errors, you can copy the message and paste it back into the **New resource** dialog box.

8. Click **OK**.

   If you need to change anything in this resource after you click **OK**, right-click it and select **Edit resource**.

9. Click the **Save Resources** button in the Resources toolbar.

   The resource is saved with your login ID so it will continue to be available to you until you delete it.

Creating New Global Resources (*Supervisors Only*)

If you are a supervisor, you can create Global Resources for agents or groups of agents. You may want to create separate resources for different tenants or agents in different language groups. Follow the instructions in Creating New Agent Resources on page 173, adapting them as necessary. Begin by selecting the Global Resources folder or any of its subfolders.

When you click Save in the Resources toolbar, the resources you created or modified in the Global Resources folder are saved on a shared drive that has been set up for this purpose. Usually, this is the Global_resources.xml file. Other agents should be able to see the resources you create the next time they log in.

Editing Your Resources

You can change any part of a resource that you have created, such as the tenancy, language, name, or contents. (You can only change Global Resources if you are a supervisor.)

To edit a resource:

1. Right-click the resource you want to edit.
2. Select **Edit resource**.

   The **Edit resource** dialog box is displayed with all the information contained in this resource. Use the drop-down menus if you want to change the tenancy or language.

3. Change the resource name or contents as you want, selecting any text you want to delete or replace. If this is an email resource, you can also change the header fields (**To**, **Cc**, **Bcc**, and **Subject**), or add or delete an attachment.
4. Click **OK**.

   The resource is updated.

Deleting a Resource

You can delete any resource you created yourself. Only supervisors and administrators can delete a Global Resource.

To delete a resource:

1. From the Web Agent, select the resource.
2. Right-click the resource and select **Delete resource** from the menu that appears.

   The resource is removed from the Resource Area.

Viewing Your Resources

Resources are organized in a hierarchy of folders and subfolders in the Resource area of the Web Agent. In this area, you can view the folders, subfolders, and the resources they contain by selecting commands from three places. Most of the same commands are available in all three places.

- A toolbar and drop-down **Filter by** menu at the top of the Resource area
- The **Resources** menu
- Pop-up menus displayed when you right-click a folder

To show the contents of all folders and subfolders in the Resource area, select **Expand All** from the toolbar or from the **Resources** menu. To show only the folder or folders that contain all the other folders, select **Collapse All**.

Note:

You may have only one main folder, called Resources, which contains all the other folders. In this case, **Collapse All** displays only that folder.

To hide the subfolders and contents of any folder that is currently open, right-click the folder and select **Collapse folder** from the pop-up menu. To show the subfolders and contents of any folder that is currently closed, right-click it and select **Expand folder** from the pop-up menu.

Tip:

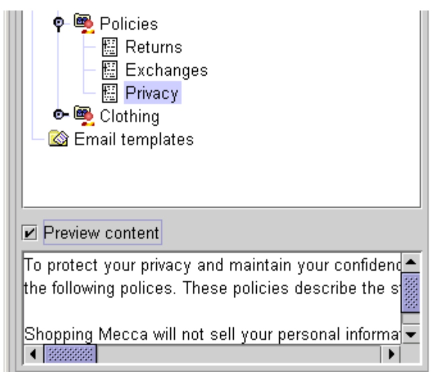
Keyboard characters to the side of the folder icons indicate whether folders are open, closed, or empty.

To display only a particular type of resource within the open folders, click one of the following items from the **Filter by** drop-down menu:

- **Blank** – Displays all types of resources for all tenants and all languages.
- **Tenant** – Displays only the resources for a specified tenant. A tenant may be any group in an organization, such as a company, location, or workgroup.
- **Language** – Displays only the resources for a specified language.
- **Text resources** – Displays only text resources.
- **URL resources** – Displays only URL resources.
- **Email resources** – Displays only Email resources.

Note:
You cannot filter Suggested Responses or Email Templates.

To view the contents of a resource without opening it, select the **Preview content** check box at the lower part of the Resources area, as shown in the following illustration. Use the vertical and horizontal scroll bars to see more of the resource.



Organizing Your Resources

You can create folders and subfolders to keep your Agent Resources organized. If you are a supervisor, you can do this for Global Resources also. After you create a folder or subfolder, you can drag and drop resources into it.

To organize your resources:

1. If you want to display the contents of all the resource folders, including subfolders and resources, select **Expand All** from the toolbar.
2. Check the **Filter by** drop-down menu to be sure you are displaying all the resources that you plan to organize into folders. If no text is displayed until you open this drop-down menu, you are displaying all the resources, regardless of type.

3. To create a new folder, right-click the existing folder in which you want to create your folder. Then click **Create folder** in the pop-up menu.

   The new folder, with the name "New resources," is added under the current folder with the name already selected so that you can easily rename it.

4. Type a new name for the folder and press **Enter**.

   The name you typed is displayed next to the folder icon.

5. If you have already created the resources for this folder, drag and drop them one at a time into the new folder. You can also drag a folder or resource from an open folder and drop it into another folder.

Importing Migrated Resources

Administrators of your contact center may have prepared resources with version 5.6 of Avaya IC. If your administrator asks you to import these "migrated" resources, take the following steps. Otherwise, you can ignore this section.

If you previously worked with version 5.6, you can import the agent resources you created as well as the global resources that administrators created. Your agent resources are located in a folder that has the name of your login ID. Your administrator should tell you where the resources you will import are located.

To import migrated resources:

1. Select **Resources > Import**.

   The window at the right side of the Web Agent displays the **Import resource file** button.

2. Click the **Import resource file** button.

   The **Open** dialog box is displayed.

3. If you had agent resources in the previous version of Avaya IC, do the following:

   a. Navigate through your folder until you find your resource file. Agent resources have .wac at the end of their filenames.

   b. Double-click the filename when you find it.

4. Use the drop-down menu to find the folder where the global resources are located.

5. Locate the global resources file. Global resources have .rsc at the end of their filenames.

6. Double-click the filename when you find it.

   The resources are imported and displayed in the Resource area.

Setting Preferences

You can use the **Web Agent Preferences** dialog box to set certain options about the display of the Web Agent and the way you handle your email and chat contacts.

Note:

Except for User Interface settings, all preference changes you make take place immediately. User Interface changes, such as changes to the size of the font or icons, take place only when you exit the Web Agent and start it again.

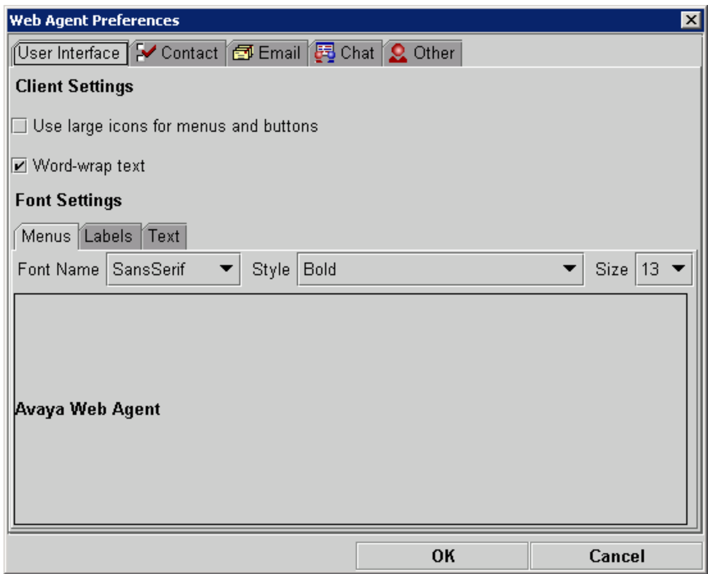
To set your preferences:

1. If the Web Agent is not currently displayed, click the **Web Agent** button in the task bar.
2. In the Web Agent, select **Tools > Preferences**.

   The **Web Agent Preferences** dialog box opens. Note that it contains five tabs and opens to the **User Interface** tab.
3. Click the tab with the category of preferences that you are interested in seeing or changing. The tabs and their options are described in the following sections:
   - User Interface Preferences on page 181
   - Contact Preferences on page 182
   - Email Preferences on page 183
   - Chat Preferences on page 185
   - Other Preferences on page 186

User Interface Preferences

When you open the **Preferences** dialog box, the **User Interface** tab is displayed, as shown in the following illustration.



User Interface preferences are related to the display of the Web Agent. The changes you make in the **User Interface** tab do not take effect in the Web Agent until you log out and log back in again.

You may see two parts of this dialog box, Client Settings and Font Settings. The Client Settings include:

- **Use large icons for menus and buttons** – With large icons, it is easier to see what the icons represent.
- **Word-wrap text** – This selection makes the text you write in email or chat move to the next line automatically whenever the text reaches the edge of the window.

The Font Settings section contains tabs and drop-down menus for you to choose the way the text looks in different parts of the interface.

Tip:

To see a sample of the different font options, make selections from the drop-down menus. The sample text in the changes according to your selections. The selections are saved only when you click **OK**. You will see the changes in the Web Agent the next time you log in.

The Font Settings include:

- **Font Name** – The name of the type face. You may see the following choices:
  - **Serif** – A font with decorated letters, that is, letters with little strokes on their edges.

- **SansSerif** – A font with plain letters, that is, letters without little strokes on their edges. The font in this sentence is a SansSerif font.
- **Monospaced** – A font in which all letters have the same width. Many newspapers use a monospaced font.

- **Style** – Whether the font is **bold** or plain.

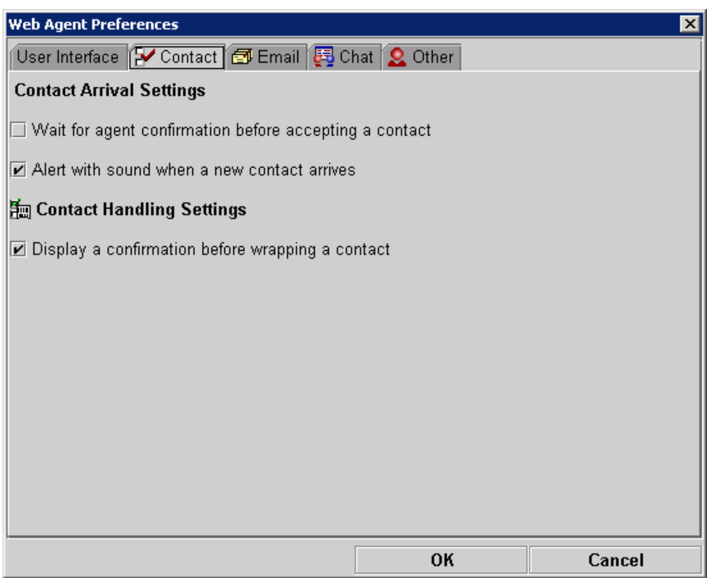
  CAUTION:

  If you are using Japanese characters and want to use a bold text style, you *must* select a monospace font. If you want to use a serif or sansserif font with Japanese characters, you *must* select the Plain text style or Avaya Agent may not display chat and email preview text correctly.

- **Size** – The size of the font. Usually the smallest size you can choose is 8 and the largest is 20.

Contact Preferences

The options in the **Contact** tab apply to both email and chat contacts. The options, as shown in the following illustration, are as follows:



- **Wait for agent confirmation before accepting a contact** – If you select this option, a dialog box, called a "screen pop," is displayed whenever a new email or chat contact arrives, allowing you to accept or reject the contact. If you reject the contact when the dialog box is displayed, the contact is assigned to another agent.

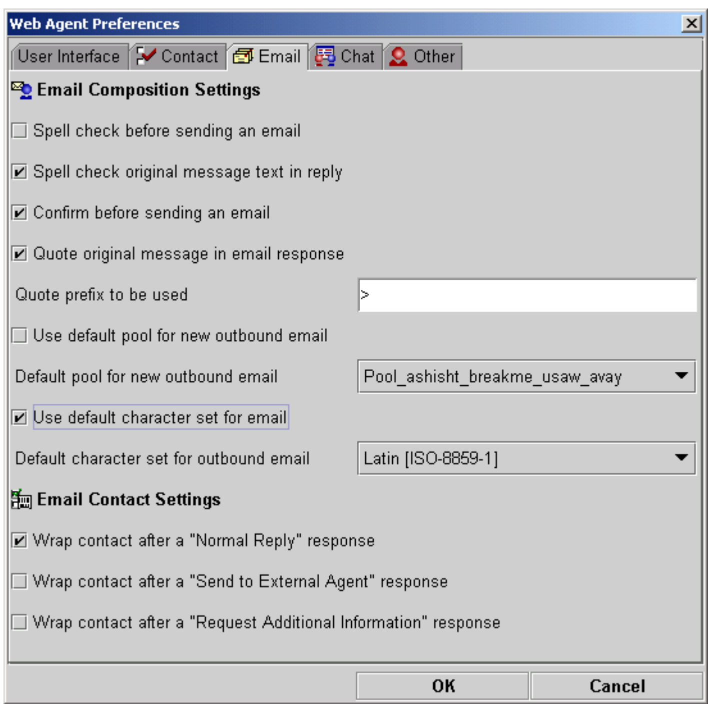
Note:

If you select this option and you do not click Yes or No in the allotted time when the dialog box is displayed, the chat or email contact will be removed from your task list. In addition, your agent state will change to Aux-work.

- **Alert with sound when a new contact arrives** – If you select this option, a sound is played whenever a new email or chat contact is assigned to you. The sound is the Microsoft® Windows default beep, defined in the properties for system sounds in the Windows Control Panel.
- **Display a confirmation before wrapping a contact** – If you select this option, whenever you click the **Wrap** button, a dialog box asks you to confirm that you want to wrap up the email contact or chat contact. This prevents you from accidentally ending the session with your customer.

Email Preferences

The options in the **Email** tab apply only to email you send from the Web Agent. The options are as follows:



- **Spell check before sending an email** – If you select this option, the Spell Checker is displayed whenever you press the **Send** button. This reminds you to check the spelling of each email message and allows you to correct any errors before the message is sent to the customer.

- **Spell check original message text on reply** – Check this box if you want to include the customer's original message when you spell check your email replies. If you do not select this option, the Spell Checker will check only the new text in your reply.

  Note:

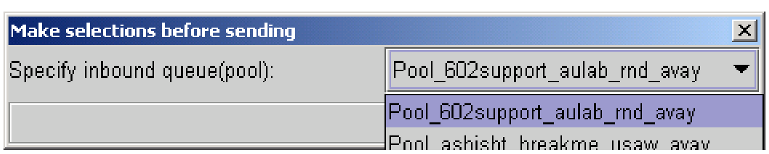
  If you do not select this preference, you should be careful when you use the **Change All** feature. The **Change All** feature may not change all occurrences of the word, possibly leaving misspelled words, if you do either of the following things:

  - If you clicked the **Ignore** button when the Spell Checker found this misspelled word in previous text of this email, then it will continue to ignore the misspelled words.
  - If you cancel the spell check before it has finished checking the entire message, the misspelled word might occur in text that was not checked.

- **Confirm before sending an email** – If you select this option, after you click the **Send** button to send an email, a dialog box asks if you are certain that you want to send this message. This gives you a last chance to check your emails before you send them.
- **Quote original message in email response** – This option inserts the customer's original message into your email replies. With this option, you can see what you are responding to and your customer can see what they wrote you in their original message. If you select this option, you can also select the following:
- **Quote prefix to be used** – You can change the keyboard character that is entered in the text box at the start of each line in the original message. The default character is a closed angle bracket (>).
- **Use default pool for new outbound email** – This option lets you set the queue (pool) that will be used when you originate a new outbound email. The queue that is used for your outbound emails is also used to route replies to those emails. For example, if a support queue is used for your new outbound emails, replies to your new outbound emails will be routed to the support queue. If you select this option, select the queue that will be used for all of your new outbound emails from the drop-down menu.

  Note:

  If you do not select this option, whenever you start to send a new outbound email, a dialog box like the following will ask you to select the queue.

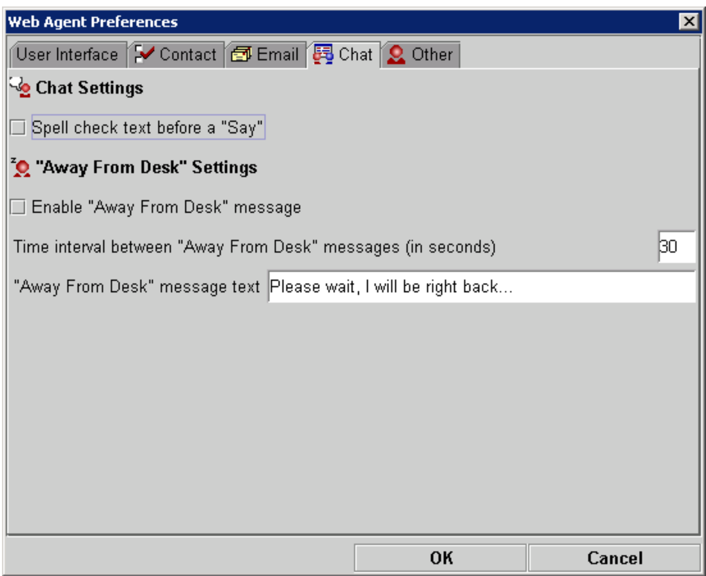
  

- **Use default character set for email** – You can change the character set used by default in your new outbound email to the character set of another language. If you select this option, select the character set from the drop-down menu.

- **Wrap contact after a "Normal Reply" response** – If you select this option, your normal email replies are automatically wrapped up after you send them. Normal replies are email responses in which you leave **Normal Email Reply** selected in the drop-down menu.
- **Wrap contact after a "Send to External Agent" response** – If you select this option, your email replies when you select **Send to External Agent** from the drop-down menu are automatically wrapped up after you send them.
- **Wrap contact after a "Request Additional Information" response** – If you select this option, your email replies when you select **Request Additional Info** from the drop-down menu are automatically wrapped up after you send them.

Chat Preferences

The options in the **Chat** tab, which apply only to chat sessions, are as follows:

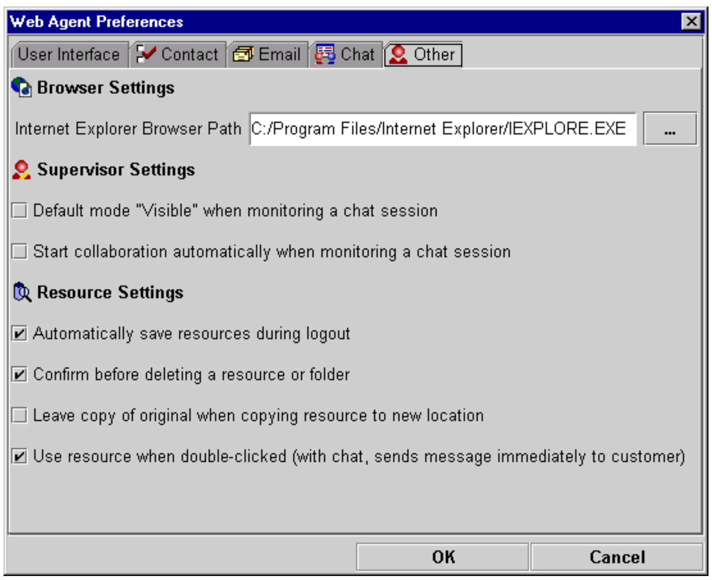


- **Spell check text before a "Say"** – If you select this option, the Spell Checker is displayed whenever you press the **Say** button, so you can check the spelling of each chat message and correct any spelling errors before the Web Management software sends the chat message to the customer.
- **Enable "Away From Desk" message** – If you select this option, whenever you have not responded to the customer within the specified period of time, a message is sent to the customer. This is useful if you plan to be available to handle multiple chat sessions or multiple channels simultaneously, such as email and chat. After you select this check box, you can change the time interval, and you can specify what the message says in the text box.

- **Time interval between "Away From Desk" messages** – The message referred to in the description of the previous preference is sent each time the specified amount of time passes, until you type a chat message to the customer.
- **"Away From Desk" message text** – This option lets you can change the text that is sent to the customer whenever you do not respond within the time interval that is specified.

Other Preferences

The options in the **Other** tab are as follows:



- **Internet Explorer Browser Path** – If you want to use a different installation of Internet Explorer, click the button and navigate to the program.
- **Default mode "Visible" when monitoring a chat session** – (*Supervisors only*) If you are a supervisor and you select this option, whenever you begin to monitor a chat session, the system announces your presence to the agent in the Transcript area.
- **Start collaboration automatically when monitoring a chat session** – (*Supervisors only*) If you are a supervisor and you monitor multiple sessions and you do not use Shared Browsing in the sessions, you may want to select this option. Otherwise, whenever you start to monitor a session, a browser opens to enable Shared Browsing in that session, and whenever you leave a session, the browser closes.
- **Automatically save resources during logout** – If you select this option, any new resources are always saved when you log out, and you do not get a message asking if you want to save them.

- **Confirm before deleting a resource or folder** – If you select this option, whenever you start to delete a resource or a folder, a dialog box asks if you are certain you want to do this.
- **Leave copy of original when copying resource to new location** – If you select this option, whenever you drag and drop a resource from one folder to another, the original resource remains in the original location while a copy of that resource is created in the new location.
- **Use resource when double-clicked** – If you select this option, whenever you double-click a resource, its contents are inserted into the email or sent to the chat customer immediately. If you do not select this option, when you double-click a resource in a chat session, the resource moves to the Text Entry area, where you have a chance to view or change it before sending it to the customer.

Using Web Self-Service

The Web Self-Service database contains commonly requested information about products and services that your contact center supports. This makes it possible for your customers to find answers to their questions by themselves. The database is also referred to as the FAQ (frequently asked questions) database.

You can also help your customers find answers in this database, in the following ways:

- For your chat customers:
  - Use the Auto Sync feature to lead them to the appropriate documents
  - Push URLs of the documents to them
- For your email customers:
  - Email them the URLs of the appropriate documents
  - Paste the contents of the documents in your email responses
- For your telephone customers:
  - Read to them the URLs or the contents of the appropriate documents
  - Email them the URLs or the contents of the documents
- For all your customers:
  - Create resources using the contents of the document

Finding Documents in Web Self-Service

It is a good idea to learn your way around the Web Self-Service database so you can help customers quickly. You can find topics and documents in the following two ways:

- Navigating the Topic Hierarchy on page 188
- Searching the Web Self-Service Database on page 189

Tip:

By default, your browser is displayed inside the Avaya Agent. To see more of your browser, open the **Avaya Agent** menu and select **Always on Top** to remove the check mark.

Navigating the Topic Hierarchy

One way to find specific topics and documents in the Web Self-Service database is to navigate the topic hierarchy, as described in the following procedure.

To navigate the topic hierarchy:

1. In the Web Agent, select **Tools > Submit FAQ**.
2. If you want to find a document for a tenant other than the DefaultTenant, click **Manage FAQ** on the left side of the page.

   Your browser opens to the Manage FAQ page, asking you to select a tenant A tenant may be a company, such as XYZ Corp; a location, such as New York or Boston; or a workgroup, such as Sales or Support.
3. Select the tenant and then click **Manage FAQ**.

   The FAQ Database page displays the root folders in the database of FAQ documents.
4. If you want to find documents in a different language from the one displayed, select that language from the **Select language** drop-down menu at the top of the page.
5. Navigate through the folder hierarchy in the FAQ Database section to find the desired topic.

   Topics are indicated by folder icons. Folders may contain other folders, which may contain still more folders, and so on. When you open a topic folder containing documents, the documents are displayed under a line separating them from the folder. Documents are marked by a document icon.
6. Click the name of any document that you want to see.

   The contents of any text document you select are displayed beneath a line separating it from the list of documents.

   If the document is a URL, click the link beneath the topic title to display the Web page containing the information.

Searching the Web Self-Service Database

You can search the Web Self-Service database for any available topics or documents that match your search criteria.

To search the Web Self-Service database:

1. In the Web Agent, select **Tools > Search Web Self-Service**.

   Your browser opens to the Search FAQ page.

2. If you want to search for a document associated with a tenant other than the DefaultTenant, click **Search FAQ** on the left side of the page, select the tenant, and then click **Search FAQ**.
3. If the document you want to view is related to a specific language, make the appropriate selection from the drop-down menu.
4. Enter a term in the **What are you searching for** field.

   Note:

   The term you enter can be a phrase or a single keyword. You cannot use any wildcards.

5. Click **Go**.

   All documents containing the term you entered are displayed in the Search page.

Submitting Documents to Web Self-Service

You can submit a document for addition to the Web Self-Service database, which is then subject to your administrator's approval or rejection. You can create the document on the Submit a Document page, paste an existing document into that page, or enter a URL that displays an HTML document.

Note:

If you are a supervisor, there are several additional fields available when you submit a document. For a description of those fields, see Viewing, Editing, or Deleting Proposed Documents on page 190.

To submit a document for the Web Self-Service database:

1. In the Web Agent, select **Tools > Submit FAQ**.
2. If you want to submit a document for a tenant other than the DefaultTenant, click **Manage FAQ** on the left side of the page.

   Your browser opens to the Manage FAQ page, asking you to select a tenant A tenant may be a company, such as XYZ Corp; a location, such as New York or Boston; or a workgroup, such as Sales or Support.

3. Select the tenant and then click **Manage FAQ**.
4. If you want to find documents in a different language from the one displayed, select that language from the **Select language** drop-down menu at the top of the page.
5. Select the topic to which you want to add a document.
6. At the bottom of the Manage FAQ page, click **Submit**.

   The Submit a Document page is displayed
7. Write unique title for this document in the **Document Title** field.
8. If the document is an HTML page set up for the Web site, click **Internet Link**. Then enter the URL with the complete address, such as `http://www.avaya.com`
9. If the document will be text, leave the **Text** button selected. Enter your text for the Web Self-Service database in the **Text** box.

   Tip:

   If you want, you can copy from an existing document, such as a Microsoft® Word document or an email, and then paste the copy into the text box.
10. Read what you have written to check it for errors.

    Tip:

    You can use the following trick to spell check your document. Select the entire document in the Text box and click Ctrl-C to copy the text. Then go to the Web Agent and select **Tools > Compose new email**. Click Ctrl-V to paste the text you copied into the Text Entry area. Click the **Spell Check** button and check the spelling. After you correct any errors, select and copy the message. Return to your browser and the Submit a Document page. Paste the text back into the Text box. (Later you can delete the email composition text from the Web Agent.)
11. Scroll to the bottom of the Submit a Document page and click **Submit**.

    Your document is added to the Proposed Documents list, which is the list of documents waiting for approval from your supervisor. If you want to view, edit, or delete a document you have submitted, see Viewing, Editing, or Deleting Proposed Documents on page 190.

Viewing, Editing, or Deleting Proposed Documents

You can make changes to a document that you have proposed for the FAQ database, or remove it before your supervisor has approved or rejected it.

If you are a supervisor, you can view, edit, and delete the proposed documents that agents in your workgroup submit. In addition, as supervisor, it is your responsibility to read the documents that agents in your submit to the database and either approve or reject them. For information, see Approving or Rejecting Documents (Supervisors Only) on page 191.

To view, edit, or delete proposed FAQ documents:

1. In the Web Agent, select **Tools > Submit FAQ**.
2. Select **Manage Proposed FAQ** from the left side of the page.
3. If the proposed FAQ that you want to see was entered for a different tenant or in a different language, make an appropriate selection. Then click the **Manage Proposed FAQ** button.

   A list of pending FAQ documents for this tenant and language is displayed.
4. To view a proposed document, click its title.
5. If you are an agent, make any necessary changes and click the **Update** button.
6. If you are a supervisor:
   a. Read the document and decide whether you want to accept it. If you do not want to add the document, scroll to the bottom of the page and click the **Reject** button. Otherwise, continue with this procedure.
   b. Enter the ASCII title for the document. This title will always appear exactly as you enter it regardless of what language is selected.
   c. Make any necessary changes to the language-specific portions of the document that were entered by the agent.
   d. Enter the task type, mail account, and routing hint information for this document. (For details about these fields, see *IC Administration Volume 2: Agents, Customers, & Queues*.)
   e. When you are done, click the **Accept** button.

Approving or Rejecting Documents (*Supervisors Only*)

As a supervisor, you must approve or reject documents submitted by members of your workgroup.

To approve or reject proposed FAQ documents:

1. In the Web Agent, select **Tools > Submit FAQ**.
2. Select **Manage Proposed FAQ** from the left side of the page.
3. Select the tenant or language of the proposed documents you want to see and click **Manage Proposed FAQ**.

   A list of pending FAQ documents for this tenant is displayed.
4. To view a proposed document, click its title in the **Pending** column.

5. Read the document and decide whether you want to accept it. If you do not want to add the document, scroll to the bottom of the page and click the **Reject** button. Otherwise, continue with this procedure.
6. Enter the ASCII title for the document. This title will always appear exactly as you enter it regardless of what language is selected.
7. Make any necessary changes to the language-specific portions of the document that were entered by the agent.
8. Enter the task type, mail account, and routing hint information for this document. (For details about these fields, see *IC Administration Volume 2: Agents, Customers, & Queues*.)
9. When you are done, click the **Accept** button.

Chapter 7: Handling Outbound Contact Calls

Your company might require you to make telephone calls to customers using the Avaya™ Outbound Contact Management feature. If so, you use information displayed on the **Outbound Contact** tab to handle automated outbound calling.

Note:

Do not confuse Outbound Contact with Outbound List Processing. You handle automated outbound calls using the **Outbound Contact** tab in Avaya Agent. You make outbound calls manually using the **Outbound Lists** tab, described in Chapter 8: Managing Outbound Lists.

Outbound Contact initiates telephone calls to customers while automatically displaying the customer information. The software guides you through the process of handling each call, from the initiation of the telephone call to recording its outcome.

This chapter provides you with step-by-step instructions on how to handle Outbound Contact calls, under the following topics:

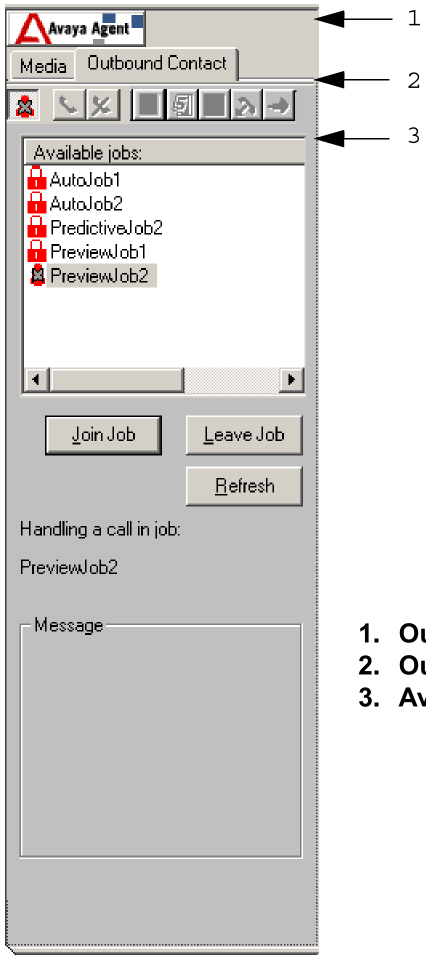
- Using Avaya Agent with Outbound Contact
- Getting Started with Outbound Contact
- Proceeding Through Agent Tasks
- Agent Blending
- Example: Using Outbound Contact

Using Avaya Agent with Outbound Contact

If you are assigned to use Outbound Contact, your supervisor has set up your calling activities, called “jobs.” A job includes a list of customers to be called.

As you carry out these jobs, you use areas of the Avaya Agent to help you manage your telephone calls to customers. For example, as you speak with customers, you can view information about them on the **Contact History Browser** tab.

The following illustration shows the **Outbound Contact** tab.



1. **Outbound Contact tab**
2. **Outbound Contact toolbar**
3. **Available jobs bar**

Note:

Your system administrator can customize the appearance, behavior, and positioning of Avaya Agent. Therefore, your desktop might look and function differently from the illustration above.

The following components in Avaya Agent help you manage your outbound calling activity:

- **Outbound Contact** tab – Shows the available jobs you can join and the activities you can complete during each call. You can sort the list of job names in ascending order (A-Z and 0-9) or descending order (Z-A and 9-0) by clicking the **Available jobs** bar.
- **Prompter** tab – Displays the script you follow during your conversation with the customer. You enter information and select the appropriate responses from drop-down lists, check boxes, or option buttons. Your script might include command buttons such as **Yes**, **No**, **OK**, **Cancel**, **Next**, or **Back**.
- **Contact History Browser** tab – Lists information about previous contacts your company has had with the same customer.

Getting Started with Outbound Contact

When using Outbound Contact, you speak with customers and handle telephone calls whether you are learning how to use this software, handling sensitive calls that require time to review the customer information, or calling customers with a quick reminder.

Outbound Contact uses the dialing mode assigned to yourself, the job, and optionally the customer record to identify how you will receive connections to customers. When your supervisor defines your agent account, he or she assigns a dialing mode. When your supervisor sets up a job, he or she assigns a dialing mode to the job. When setting up the customer data to import, your contact center administrator potentially assigns a dialing mode to the telephone number. The dialing mode determines how the software:

- Dials customer telephone numbers
- Connects you with customers
- Displays customer information

Outbound Contact has three dialing modes:

- Preview dialing mode – Outbound Contact notifies you of the telephone call before it dials the customer’s telephone number. You can prepare for the call and view the customer’s information on the **Contact History Browser** tab. Preview is the least aggressive dialing mode.
- Automatic dialing mode – Outbound Contact places a call to the customer and notifies you about the telephone call as it dials the number. The software displays a conversation script on your desktop when you hear the ringing tone.
- Predictive dialing mode – Outbound Contact dials the customer telephone number, displays the customer information, and connects you with the customer. You receive the call as the software displays the customer's information on the **Contact History Browser** tab. The script is displayed on the **Prompter** tab. Predictive is the most aggressive dialing mode.

During the job, Outbound Contact uses the least aggressive of the dialing modes assigned to yourself, the job, and the telephone number to determine how to establish the telephone call, which affects when you receive the customer information. For example: If you as the agent is set to preview mode, the outbound job is set to the predictive mode, and the telephone number is set to automatic mode, then Outbound Contact uses the preview mode to present you with the customer information before you choose to accept or reject the telephone call.

Logging In to Outbound Contact

The way you log in to Outbound Contact depends on whether you have a single login ID and password for Avaya Agent, or you have one login ID and password for the work you do from the **Media** tab and a different login ID and password for Outbound Contact.

If your Avaya IC system uses a feature called Business Advocate, you have a different login ID and password for Outbound Contact. When you want to switch between doing work on the **Media** tab and doing Outbound Contact jobs, you must log out of Avaya Agent and log back in with the other login ID and password.

If you do not have a separate login ID and password for Outbound Contact, you log in to Outbound Contact after you log in to Avaya Agent, as described below.

Note:

Whether you have one login ID or two, you must log in to Avaya Agent at the workstation that has the Phone Type assigned to your login ID. Ask your supervisor for help, if you cannot log in to Outbound Contact.

To log in to Outbound Contact:

- On the **Media** tab, click **Agent** to change the button to **Available.** When Avaya Agent switches you to Outbound Contact, the Agent icon changes to Outbound Contact and moves you to the **Outbound Contact** tab.

CAUTION:

When handling outbound calls, complete each conversation using the toolbar buttons on the Outbound Contact tab. Select the **Close** toolbar button to end the conversation and complete the Wrap-up dialog box, and select the **Proceed** toolbar button to complete the call.

Joining Outbound Jobs

Using the **Outbound Contact** tab, you select one or more jobs, join the jobs, and go “off break” to become available to handle calls. Outbound Contact begins the process of connecting you with customers.

To join a job:

1. In the **Available jobs** field, select the jobs your supervisor tells you to join.

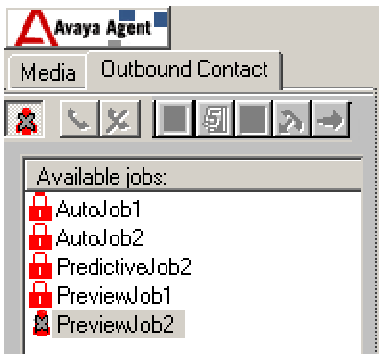
Tip:

To display the list of jobs in ascending (A-Z and 0-9) or descending (Z-A and 9-0) order, click the **Available jobs** bar.

- To select a series of consecutive jobs, press the **Shift** key, and then select the first and the last job name.
- To select more than one job individually, press the **Control** key while you select each job name.

2. Click **Join Job** on the toolbar.

   The icon preceding the job name changes from a closed red lock to an crossed-out agent ready for you to go “off break,” as shown in the following illustration:

   After you join one or more jobs, you are ready to use Outbound Contact.

Making Yourself Available for Outbound Contact Calls

After logging in, you need to make yourself available to receive Outbound Contact calls. You will initially be “on break.”

To make yourself available:

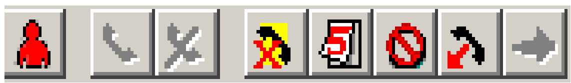
- Click **Off Break** on the toolbar.

The icon preceding the job name changes from a crossed-out agent to an open blue lock. You are ready to receive and handle outbound calls.

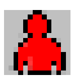
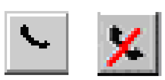
Outbound Contact displays customer information on your screen based on the least aggressive dialing mode assigned to you, the job, and the telephone number. For more information, see Getting Started with Outbound Contact on page 195.

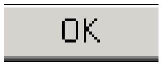
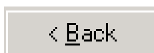
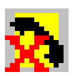
Proceeding Through Agent Tasks

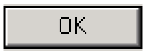
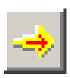
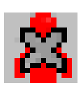
After you log in to Avaya Agent and Outbound Contact, you handle most of the calling activity from the toolbar on the **Outbound Contact** tab, as shown below.



As you proceed through each task, Outbound Contact enables and disables buttons that show the tasks you can do next. Your outbound calling tasks include the following:

Button	Action
 Join Job	Select and join one or more jobs that your supervisor started. Select jobs from the **Available jobs** field. Click **Join Job** on the toolbar.
 Off Break	Click **Off Break** on the toolbar to tell Outbound Contact you are "off break" and are available to handle telephone calls. The **On Break** toolbar button becomes enabled.
 Accept Reject	If the telephone call is set to the preview dialing mode, you can accept or reject placing the call after previewing the customer information on the **Contact History Browser** tab. Click **Accept** on the toolbar to dial the number and speak with a customer. Outbound Contact enables the appropriate toolbar buttons. Click **Reject** on the toolbar to not make this telephone call. Outbound Contact enables **Proceed**. To continue with the next call, click **Proceed**. The **Accept** and **Reject** buttons are disabled for automatic and predictive dialing modes.

Button	Action
 OK  Cancel  Next  Back	During the job, you can read the script on the **Prompter** tab to greet your customer and ask questions. During your conversation, you move from question to question by clicking the appropriate button.
During your conversation, you might need to record information about placing a call to the customer in the future.	
 No Contact  OK	During the calling activity, you might handle an outbound call that did not connect with a customer because Outbound Contact detected an answering machine, busy tone, fast busy tone, special information tone, no answer, fax machine, or modem. Click **No Contact** on the toolbar. In the **No Contact** dialog box, identify why the call was unsuccessful. When you click **OK,** Outbound Contact records the call result for you. When you identify the call and click **OK,** Outbound Contact reschedules the call to occur at a later time.
 Reschedule  OK	During the telephone call, you can reschedule the call for a different day or time of day, click **Reschedule** on the toolbar. In the **Reschedule** dialog box, specify the time, date, and an agent to handle the call. Click **OK** to continue with the next call.

Button	Action
 Do Not Call  OK	If the customer asks not to receive a telephone call again, click **Do Not Call** on the toolbar. In the **Do Not Call** dialog box, you can add a reason for the customer's request. Click **OK** to continue with the next call.
 Close  OK	When you complete your conversation, click **Close** on the toolbar. Depending on Avaya Agent is set up, Outbound Contact displays the **Wrap-up** dialog box for you to record the call result. Select a category, a reason, and an outcome code. Then click **OK**.
 Proceed	Click **Proceed** on the toolbar to record the result of the telephone call and indicate that you are ready to speak with the next customer. **Note:** Depending on how Avaya Agent is set up, Outbound Contact may do this for you.
During the day, you can take a break, join additional jobs, or leave one or more jobs without logging out of the Outbound Contact.	
 On Break	Click **On Break** on the toolbar to indicate that you want to change your calling activity from being available to unavailable. You become unavailable after you complete the conversation and end the call. When you become unavailable, Outbound Contact changes the toolbar button to **Off Break**.
 Leave Job	To log off from a job, you must be "on break." To log off, select one or more jobs from the **Available jobs** field and click **Leave Job**. Outbound Contact no longer connects you with telephone calls on the job you leave.

Viewing Customer Information

Depending on the dialing mode, you can view the next customer's information either before or when Outbound Contact connects you to the customer. For more information, see Getting Started with Outbound Contact on page 195.

If the telephone call will occur using the preview dialing mode, Outbound Contact notifies you of the telephone call and displays the customer information and script. This makes it possible for you to prepare for the telephone call.

You decide whether to accept or reject placing the call before Outbound Contact dials the customer telephone number. If you reject the call, the software passes you information for the next customer that matches your profile.

- Click **Accept** to place the telephone call to the customer. Outbound Contact dials the customer's telephone number and connects you with the customer.
- Click **Reject** to not make the telephone call to the customer. Outbound Contact retrieves the next appropriate customer information and displays it on your screen.

If the call will occur in the automatic dialing mode, you see the customer information while Outbound Contact dials the customer telephone number. Typically, you do not have the option to accept or reject the call.

If the call will occur in the predictive dialing mode, you see customer information when Outbound Contact connects you to a customer.

Identifying a Cancelled or an Unsuccessful Call

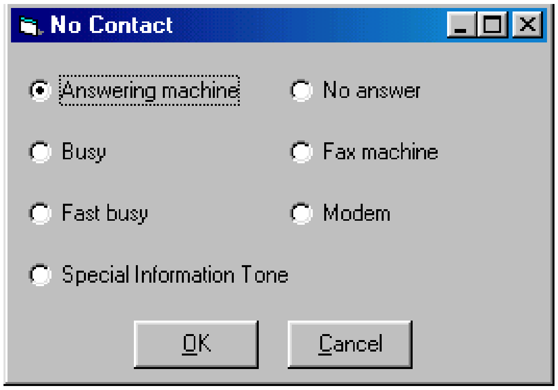
Occasionally, you may not be able to handle a call that Outbound Contact dialed. This may occur if you need to cancel a preview dialed call that is ringing or if Outbound Contact cannot successfully contact the customer. If Outbound Contact cannot contact the customer, you hear an answering machine, a telephony tone, network message, or dead air through your headset.

In these circumstances, you click **No Contact** on the toolbar, identify the reason for the unsuccessful call in the **No Contact** dialog box, and click **OK**. Outbound Contact marks the customer information to reschedule the telephone call for a later time.

Note:

If you need to cancel a preview call that is ringing, end the call from the Outbound Contact toolbar. Do not end the call from the Ringing dialog box. If you do not complete end the call from Outbound Contact, you will be reconnected to the call you just cancelled.

The **No Contact** dialog box looks like this.



The meaning of the **No Contact** reasons are the following:

Tone	Description
Answering machine	An answering machine answered the telephone call.
Busy	The telephone number is in use.
Fast Busy	The public switched telephone network (PSTN), rather than the telephone, is busy.
Special Information Tone (SIT)	You hear a series of special tones, a code, or an announcement when connected to the telephone number.
No Answer	No one answered the telephone call within the number of rings your call center would consider to be a no answer.
Fax machine	A fax machine answered the telephone call.
Modem	A telephone modem answered the telephone call.

Note:

If you do not complete the following steps to record the No Contact outcome, Outbound Contact will record the result of the telephone call as if you completed the telephone call with the customer. Outbound Contact will not reschedule the call for a later time.

To record the No Contact outcome:

1. Click **No Contact** on the toolbar.
2. In the **No Contact** dialog box, select the reason for the unsuccessful call and click **OK**.

   If you need to cancel a preview call that is ringing, select No Answer for the reason. Outbound Contact will reschedule the call for a later time.
3. Click **Proceed** on the toolbar when you are ready to speak with another customer.

   Outbound Contact connects you with the next customer.

Handling the Conversation

After you receive a call, begin your conversation with the customer by reading the script associated with the job and recording the customer's responses. Avaya Agent displays the script on the **Prompter** tab. You might need to click the **Prompter** tab to begin. The script text is based on your conversation and the customer's responses to your questions.

During the conversation, the customer might ask that you reschedule the call or that you do not place a call to the customer in the future.

Rescheduling a Call

You can reschedule a call to occur later in the day or on another day while handling a call. You can also specify whether a specific agent or any agent can handle the call. Outbound Contact records the customer's request after you end the conversation.

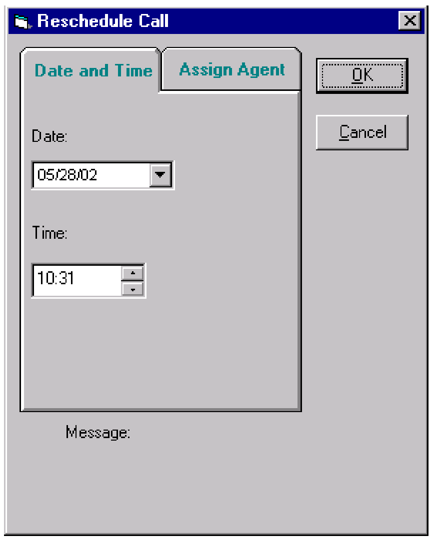
Note:

Outbound Contact calls the customer based on the customer's local time. For this reason, make sure that the agent is available at the rescheduled time.

To reschedule a call:

1. Click **Reschedule** on the toolbar.

   Outbound Contact displays the **Reschedule Call** dialog box completing the fields with the current date and time, as shown in the following illustration:



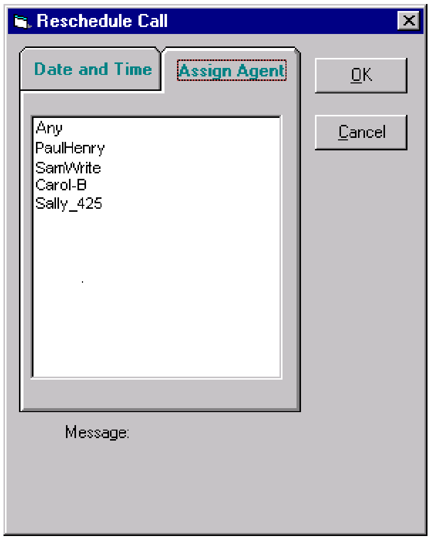
2. On the **Date and Time** tab:

   - To set the date, select the date from the **Date** field drop-down list.
   - To set the time, click the **up** or **down** arrow button to scroll to an earlier or later time of day. You can also type the time in the hour and minute fields.

   Note:

   Outbound Contact displays time based on the time format for your locale.

3. On the **Assign Agent** tab, select an agent to handle the rescheduled call, as shown in the following illustration:



   Select a specific agent name or select **Any** in the list box to have Outbound Contact assign the rescheduled call to the next available agent.

4. Click **OK** to close the **Reschedule** dialog box.
5. Click **Proceed** on the toolbar.

   Outbound Contact marks the call result and connects you with the next customer. You do not need to complete the **Wrap-up** dialog box.

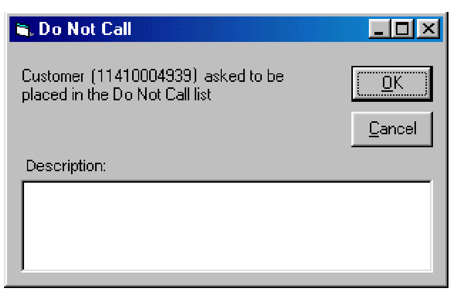
Adding the Customer to the Do Not Call List

If the customer requests never to receive a call again, follow this procedure.

To add the customer to the Do Not Call list:

1. Click **Do Not Call** on the toolbar.

   Outbound Contact displays the **Do Not Call** dialog box with the customer's telephone number as shown in the following illustration.



2. In the **Description** field, type an explanation why the customer wants to be added to the Do Not Call list.
3. Click **OK.**

   Outbound Contact ends the call, adds the customer's telephone number to the Do Not Call list, and records the customer's request in the database. You do not need to complete the **Wrap-up** dialog box.
4. Click the **Proceed** button.

Receiving Direct Calls

Occasionally, you may receive an incoming call while you are on an outbound job. This telephone call is referred to as a direct call. A person outside the contact center, another agent, or your supervisor can initiate a direct call. The direct call appears the same as an inbound call that you receive on the **Media** tab.

In Outbound Contact, you can receive a direct call on each available telephone line that is set up for your telephone. You can move between an outbound call and direct calls. Before you can handle another Outbound Contact call, you must complete all new or incomplete direct calls.

You will be notified that there is an incoming direct call. Outbound Contact displays a message on the **Outbound Contact** tab.

When a direct call arrives, the telephone number and status appear on the **Media** tab.

If you are not currently on an outbound telephone call, you can answer the direct call using the Softphone or telephone handset, or automatically when Auto Answer is set up.

To answer a direct call:

If you are currently handling an Outbound Contact or another direct call, follow this procedure to answer a direct call:

1. If necessary, excuse yourself to the original customer.
2. Click the **Media** tab and place the original customer on hold. For more information, see Placing a Voice Contact on Hold on page 89.
3. Using the **Answer** button your the telephone, answer the direct call.
4. When you are finished talking with the direct caller, click the **Media** tab.
5. Click **Hangup** to end the direct call.
6. In the **Wrap-up** dialog box, select the appropriate category, reason, and outcome codes for the direct call and click **OK**.
7. On the **Media** tab, select the original customer in the phone task list and click **Reconnect** to retrieve the customer from being on hold.
8. Click the **Outbound Contact** tab.

9. Complete the outbound call. For more information, see Completing a Call with the Wrap-up Dialog Box on page 208.

10. Click **Proceed** on the toolbar to prepare for the next call.

    Outbound Contact records the event and connects you with the next customer.

Transferring, Conferencing, and Consulting an Outbound Contact Call

You may need to transfer an outbound call or a direct call to another agent who is more qualified to handle it, or to your supervisor to handle a customer who needs more attention.

You use the **Media** tab to transfer the call, conference the call with another agent, or consult with another agent and transfer the call. Depending on the type of transfer, Outbound Contact transfers the customer information to the person to whom you placed the telephone call. For example:

- If you transfer, consult, or conference an Outbound Contact telephone call to another Outbound Contact agent, the second Outbound Contact agent receives the transferred call with the customer information. The transferred call appears like a direct call.
- If a customer places a direct call to your telephone set or if an agent transfers a direct call to you, you do not receive the customer information.

For a description of each type of transfer, see Involving Other Agents in a Voice Contact on page 90.

Note:

When transferring an Outbound Contact call, you must complete the call using the **Wrap-up** dialog box available from the **Outbound Contact** tab.

To transfer an outbound call:

1. Tell the customer that you would like to transfer the call and explain the type of transfer that you will do.
2. Transfer the call as indicated in Involving Other Agents in a Voice Contact on page 90.
3. If you are still connected to the customer after transferring the call, end the conversation and hang up the connection.
4. Click the **Outbound Contact** tab to complete the call, using the **Close** and **Proceed** toolbar buttons. For details, see

Completing a Call with the Wrap-up Dialog Box

Before you complete a call, you must end your conversation, record the customer's responses, and update the customer information. To complete the call, you record the result of the call using a category, result, and outcome code.

CAUTION:

If you do not complete the **Wrap-up** dialog box before you click **Proceed**, your contact center will not have a record of the business outcome of the call.

To complete and end the call:

1. Click **Close** on the toolbar.

   Outbound Contact displays the **Wrap-up** dialog box, open to the Outbound Result category.

2. Complete the **Wrap-up** dialog box. For details, see Wrapping Up Contacts on page 76.

   a. Select one category code from the **Categories** field.

   b. If appropriate, select one reason code from the **Reasons** field.

   c. Select the appropriate outcome from the **Outcomes** field that describes the result of the call. If you select more than one outcome code, Outbound Contact records the first code you select and Operational Analyst will report on the first Outcome code you select.

   d. Click the **down arrow** to complete the selection.

   e. Click **OK.**

   Outbound Contact disables all buttons except **Proceed**.

3. Click **Proceed** on the toolbar when you are ready for the next call.

   Outbound Contact ends the script and connects you with the next customer.

   Depending on the dialing mode, you can preview the next customer's information before connecting with the customer.

Handling Nuisance Calls

If you see "Nuisance Call" in the message box when you speak with a customer, Outbound Contact previously called the customer in predictive dialing mode during the job but there was no agent available at that time to speak to the customer.

Tip:

During your conversation, you can apologize for the problem that caused the nuisance call. Your supervisor can tell you exactly what you should say to customers who have received a nuisance call.

Going On and Off Break

When you go “on break,” you signal the Outbound Contact that you are unavailable to handle additional outbound calls. When you want to resume handling outbound calls, you go “off break” to signal the software that you are available for calls.

Taking a Break

You can indicate that you want to go “on break,” any time during the job while you are off break. Your break becomes effective after you complete the conversation and end the outbound or direct call.

To take a break:

- Click **On Break** on the toolbar.

Outbound Contact makes the **Off Break** button available indicating that you are unable to handle outbound calls or speak with customers. The icon preceding the selected jobs in the **Available jobs** field changes from an open blue lock to a crossed-out agent.

Returning to Work

After your break, you resume handling outbound calls or receiving direct calls by going “off break.”

To return to work:

- Click **Off Break** on the toolbar.

Outbound Contact makes the **On Break** button available. The icon preceding the selected jobs in the **Available jobs** field changes from a crossed-out agent to a open blue lock.

Leaving Outbound Jobs

You can leave one or more jobs at the same time. For example, you would leave a job when your supervisor wants you to concentrate on a specific calling activity, you are going on a break, or your workday is ending.

To leave a job:

1. Complete the current call.
2. Click **On Break** on the toolbar.

   The icon preceding the selected jobs in the **Available jobs** field changes from an open blue lock to a crossed-out agent once you are “on break.”

3. Select the job or jobs you want to leave.
   - To select a series of consecutive jobs, press the **Shift** key, and then click the first and the last job name.
   - To select more than one job individually, press the **Control** key while you click each job name.
4. Click **Leave Job**.

   The icon preceding the job in the **Available jobs** field changes from a crossed-out agent to a closed red lock.

   Note:

   You are still logged in to Avaya Agent. You can continue to use the Avaya Agent channels that are set in the **Media** tab.

Logging out of Outbound Contact

After you leave one or more outbound jobs, you can log out of Outbound Contact by logging out of Avaya Agent.

For more information on logging out of Avaya Agent, see Logging Out of Avaya Agent on page 46.

To log out of Outbound Contact:

1. Leave each outbound job.
2. On the **Media** tab, click **Agent** until the icon changes to **Agent Aux** status (Unavailable).
3. On the **Avaya Agent** menu, select **Exit**.

Agent Blending

You might be assigned to handle work on inbound, email, and chat channels using the **Media** tab and Outbound Contact calls using the **Outbound Contact** tab. If you are available for all channels, Outbound Contact suspends you from working on any channel except Outbound Contact when you are handling outbound calls. Similarly, when you handle work on other channels, you cannot handle Outbound Contact work.

When handling Outbound Contact work, you can handle the outbound calls and receive direct calls without handling inbound contacts on the **Media** tab.

Outbound Contact alternates the activities you can do based on the skills assigned to you and outbound jobs. Outbound Contact uses the **Agent Blending** parameters set for the jobs to help determine:

- Whether you can blend your work across Outbound Contact and other channels
- When you move out of the Outbound Contact channel
- When you return to the Outbound Contact channel

Releasing You from Outbound Contact

When one of the other channels has a need for agents that are on outbound calling, Outbound Contact puts you “on break” and “releases” you and other agents from the outbound calling activities.

In this case, after you complete your current call, Outbound Contact performs the following actions:

- Places you “on break” for each outbound job you joined
- Makes the **Media** tab active

When you are released from Outbound Contact, you can receive incoming contacts or manage Outbound List contacts.

Acquiring You from Channels

When the other channels have an excess of agent capacity, Outbound Contact “acquires” agents or makes some agents available for outbound calling again based on the job requirements.

Avaya Agent performs the following actions so that Outbound Contact can acquire you:

- Displays the word “Outbound” below the status bar on the **Media** tab
- Resets your channel load for each channel to zero
- Moves you to the **Outbound Contact** tab
- Returns you to the jobs you originally joined

Note:

To join additional jobs, select each job in the **Available jobs** field. Then, click **Join Job**.

To resume your Outbound Contact activities:

- Click the **Off Break** button.

  You can now resume handling automated outbound calls.

For more information, see Joining Outbound Jobs on page 196 and Making Yourself Available for Outbound Contact Calls on page 197.

Example: Using Outbound Contact

In the following example, your supervisor assigned you to the Automobile Preference campaign. One of the jobs you joined is named Auto Manufacturer. While handling calls during this job, the job name is displayed in the field below the list of available jobs. During this job, you speak with a potential customer who attended the annual Automobile Show.

The example assumes you are capable of handling predictive calls and that all customers are called using the predictive dialing mode. Outbound Contact calls each customer and connects you with the customer and their information immediately. During your conversation, you record their responses to the Show script.

The following is an example of the steps you complete:

1. Log in to Avaya Agent by selecting the Avaya Agent shortcut from the Windows Start menu. For example, select **Start > Programs > Avaya Interaction Center 7.0 > Interaction Center**.

   The **Avaya Agent Login** dialog box is displayed.

2. On the **Avaya Agent Login** tab, type your login ID and password.

   The Avaya Agent displays the agent desktop as follows:

   - Contact History Browser displays prior contacts with the customer.
   - EDU Viewer displays call information.
   - Prompter displays the script you use during the job.

3. Click the **Outbound Contact** tab to begin your calling activities.

   Outbound Contact displays a list of jobs that matches your skills.

4. Select the jobs your supervisor tells you to join in the **Available jobs** field and click **Join Job**.

   Outbound Contact joins you to the jobs and begins placing telephone calls to customers.

   Avaya Agent displays the customer's information on the **Contact History Browser**, **Prompter**, and **EDU Viewer** tabs. The software displays the customer number in each.

   The toolbar buttons (**Accept**, **Reject**, **Reschedule**, **Do Not Call**, **Close**, and **Proceed**) become enabled.

5. Greet the customer and click the **Prompter** tab.

   Avaya Agent displays the Show script, a simple survey of prospective car buyers, in the Prompter.

6. During your conversation, you read the script and record the customer's answers. Soon after you begin your conversation, the customer asks you to reschedule the call later in the week, any time after 5 p.m. The customer asks to speak with you, not another agent, on the rescheduled call.

7. Before closing your conversation, click the **Reschedule** button on the toolbar to set up when the customer would like to be called back later in the week (any time after 5 p.m.). Indicate that the customer would like to speak with you.

   a. Reschedule the date and time of the call on the **Date and Time** tab.

   b. Click your name on the list on the **Assign Agent** tab, and click **OK**.

8. To complete the call and speak with the next customer, click **Proceed** on the toolbar.

   Outbound Contact displays new customer information on the desktop as it connects you with the customer.

9. During the next call, the customer requests to be put in the contact center's Do Not Call list for this campaign.

   a. End the conversation.

   b. Click **Do Not Call** on the toolbar.

   c. Provide an explanation for this request and click **OK**.

10. To complete the call and speak with the next customer, click **Proceed** on the toolbar.

    After two hours, it is time for your morning break. You want to make yourself unavailable to speak with customers but you do not want to leave any of the jobs.

11. Click **On Break** on the toolbar.

    At the end of the current call, Outbound Contact updates the icons that are associated with each job you joined. A crossed-out agent replaces the blue open lock.

12. When you return from your morning break, click **Off Break** on the toolbar.

    Outbound Contact updates the icons that precede each job replacing the crossed-out agent with the blue open lock.

13. When you complete your calling activity, you complete your call, make yourself unavailable for outbound calls, and leave the jobs, as follows:
    a. Click **On Break** on the toolbar.
    b. If there is a current call, complete the call and click **Proceed** on the toolbar.
    c. On the **Outbound Contact** tab, select the jobs to leave from the **Available jobs** field.
    d. Click **Leave Job**.

       Outbound Contact removes you from each job. As you leave a job, the software changes the icon that precedes the job from a crossed-out agent to a red closed lock.

Chapter 8: Managing Outbound Lists

The Outbound List Processing component of Avaya Agent handles customer lists for outbound campaigns that you dial manually. With Outbound List Processing, you initiate telephone calls using Softphone.

Note:

Do not confuse Outbound List Processing with Avaya™ Outbound Contact Management. You make outbound calls manually using the **Outbound Lists** tab. You handle automated outbound calls using the **Outbound Contact** tab, described in Chapter 7: Handling Outbound Contact Calls on page 193.

This chapter contains the following topics:

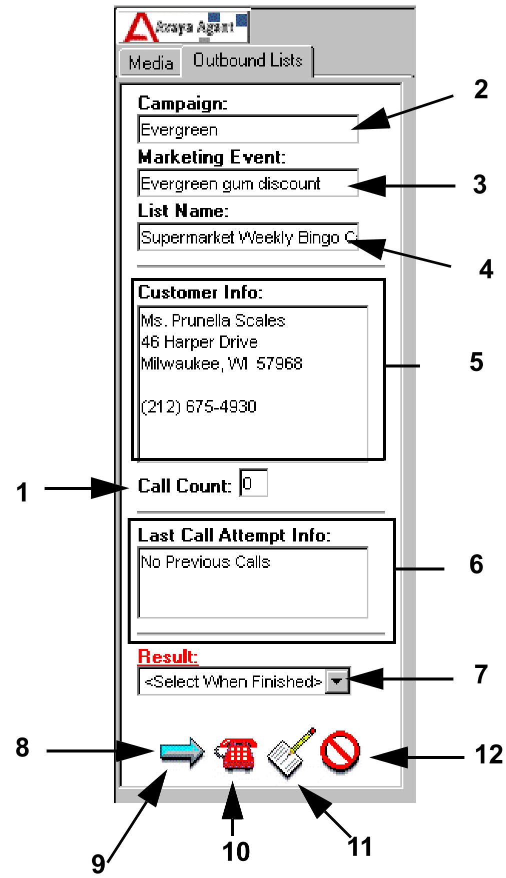
Overview of Outbound List Processing

Your system administrator can create multiple customer lists in ListQ. These lists pass to the **Outbound Lists** tab. Each outbound list contains a group of customers who are related, such as customers who are located in the same area or who purchased the same product. You may use the outbound lists during outbound campaigns to call customers and notify them about upcoming sales and marketing events.

When you select an outbound list, Outbound List Processing selects the first customer on the list and displays basic information about that customer on the **Outbound Lists** tab. The lists provide you with information like the following, which you can use during your interaction with the customer:

- Campaign name
- Marketing event
- List name
- Customer information

When you click the Avaya Agent **Outbound Lists** tab, the display looks like this:



1. **The number of times this customer has been called from this particular list**
2. **The name of the marketing campaign associated with this list**
3. **The name of the specific marketing event associated with this list**
4. **The name of the list**
5. **Customer's name with some brief details selected by the system administrator**
6. **Information about the previous call made to this customer**
7. **When the call is completed, click a result from this drop down list**
8. **List Management buttons**
9. **Next Customer button**
10. **Place Call button**
11. **Done button**
12. **Cancel icon**

As you complete calls to customers, Outbound List Processing cycles through the next customers in the list. The **Outbound Lists** tab displays the name of the associated campaign, the marketing event, the list name, and the customer information.

Depending on how your system administrator configured Avaya Agent, Outbound List Processing may also do the following:

- Sort the lists by priority and select a customer from the highest priority list
- Set the maximum number of times to call a customer for a specific list, and when that limit is reached, set the customer's status to Unreachable and not call the customer again
- Set the length of time between attempts to call a customer if the result of a call is Busy, Answering Machine, or No Answer

Note:
If your system administrator set up the list to coordinate with ListQ, you can view the customer's record information in ListQ.

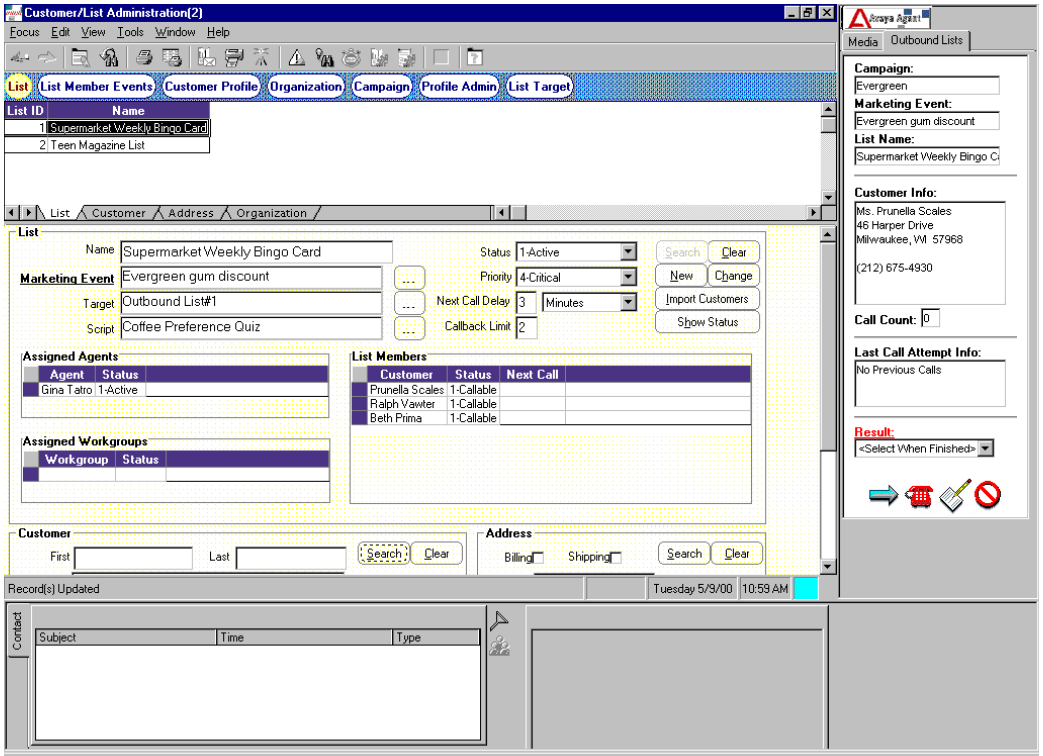
Making Calls with Outbound Lists

If you are using Outbound List Processing, you use a list of customers in the **Outbound Lists** tab and Softphone to make calls.

To use Outbound List Processing to contact customers:

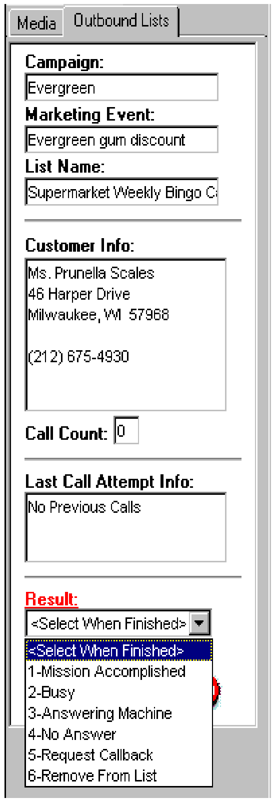
1. Log in to Avaya Agent. For logging in details, see Logging In and Logging Out on page 41.
2. Click the **Outbound Lists** tab and bring that component to the front.
3. To start your call, click **Next Customer**.

   Outbound List Processing selects the first customer from the list and fills the **Outbound Lists** tab with the customer's information. Depending on your system configuration, Avaya Agent may display the customer record information or leave the customer list information visible in the appropriate ListQ focus.



4. To dial your call to the customer, click the **Place Call** button.
5. When the customer answers, read the script in Prompter.
6. Record the customer’s information and responses in the script fields.

7. Click the appropriate outcome of the conversation from the **Result** list.



8. When you are finished, click the **Done** button.
9. To call the next customer on your list, repeat from Step 3.

Appendix A: Troubleshooting

On occasion, Avaya Agent or one of its features may fail to work properly. Find the description of your problem and follow the solution to return to normal

- Avaya Agent Problems on page 221
- Inbound Voice Problems on page 223
- Outbound Contact Problems on page 226
- Avaya Agent on Citrix Problems on page 229

Avaya Agent Problems

You may have the following problems with Avaya Agent. Carry out the listed solution for each problem.

- Avaya Agent Stops Responding on page 221
- Avaya Agent and Java Plugin Control Panel Stop Responding on page 222
- Cannot Log In to Avaya Agent on page 223

Avaya Agent Stops Responding

Problem: Occasionally, you may have trouble with the display of the Avaya Agent. You may not be able to use the software as you usually do.

Solution: You can restore the Avaya Agent to its normal condition by ending certain processes that your computer's operating system uses to support the Avaya Agent.

> **Note:**
> You must have administrative privileges to do the following procedure. Contact your administrator if you do not have these privileges or if you need assistance with the following procedure. If you cannot get an administrator's assistance, shut down your machine and restart it.

To restore the Avaya Agent to its normal condition:

1. Exit from the Avaya Agent if you can.

   Note:
   If you cannot exit from the Avaya Agent, open the Windows Task Manager and end the application task.

2. Open the Windows Task Manager.
3. In turn, end the qui, vtel, and mshta processes.
4. Log in to the Avaya Agent.
5. If the Avaya Agent is too large, take the following steps:
   a. Hold your cursor over the Windows task bar until you see an arrow with two ends, one pointing up and one pointing down.
   b. Click your mouse and drag the cursor upwards, until the task bar becomes larger.
   c. Repeat Step a.
   d. Click your mouse and drag the cursor downwards, until the task bar returns to its original size.

   The Avaya Agent should operate correctly and it should be the normal size again.

   Note:
   If the Avaya IC system had a problem and was restarted, you may see **Switch To/Retry** dialog boxes. If this happens, you should not click your mouse. Instead, you should sit and wait a moment or two to give the system a chance to recover.

Avaya Agent and Java Plugin Control Panel Stop Responding

Problem: After you log into Avaya Agent then open the Sun JVM control panel, both Avaya Agent and the Sun JVM control panel stop responding.

Solution: To restore Avaya Agent to its normal condition, set the Hardware Acceleration display setting to **None** for your machine.

Note:
You may need administrative privileges to do the following procedure. Contact your administrator if you do not have these privileges or if you need assistance with the following procedure.

To restore Avaya Agent to its normal condition:

1. Select **Start** > **Settings** > **Control Panel** to open the Windows Control Panel.
2. Double-click **Display**.

3. In the **Display Properties** dialog box, select the **Settings** tab.
4. In the **Settings** tab, select **Advanced**.
5. In the monitor dialog box, select the **Troubleshoot** tab.
6. Click the slider for **Set Hardware Acceleration**, and drag it all the way to the left until it is next to **None**.
7. Select **OK**.
8. Select **OK**.
9. Close the Control Panel.

Cannot Log In to Avaya Agent

Problem: After a problem that caused you to exit Avaya Agent, you attempt to log back in to Avaya Agent. You see the **Core Server(s) Failure Notification** dialog box.

Solution: You may need to use the Windows Task Manager to kill the vtel process before you can log back in. Ask your administrator how to do this.

Inbound Voice Problems

You may have the following problems when managing your inbound voice contacts. Carry out the listed solution for each problem.

- Cannot Log Into Telephony Server
- Current Voice Contact Not Highlighted
- Core Server Failure
- Agent State Changed When Logging In After Server Error
- Unavailable for Voice After Server Error
- Cannot Answer a Consult Transfer
- Softphone Stops Responding

Note:

If you are using a DEFINITY telephone switch with the Auto-In mode, see Using the Auto-In Work Mode on page 87 for troubleshooting information.

Cannot Log Into Telephony Server

Problem: When you log into Avaya Agent, you receive the message "Must LoginVESP before LoginTelephony".

Solution: Contact your system administrator. Either the VESP server or the EDU server is not responding, and Avaya IC cannot access the telephony server.

Current Voice Contact Not Highlighted

Problem: If you move your cursor away from the Phone task list, the current voice contact is no longer highlighted.

Solution: Even when the active contact is not highlighted, you can tell which contact is the active contact by the angle bracket.

Core Server Failure

Problem: You see the **Core Server(s) Failure Notification** dialog box.

Solution: Do the following steps to try to restore the connection to the servers:

1. Complete any active calls and hang up.
2. Click **Retry** in the dialog box.
3. If the connection to the servers is restored, the text in the dialog box says "Avaya Agent has successfully reconnected with the "Core Servers." If you see this message, click **OK**.
4. If the connection to the servers is not restored, click **Retry** again.
5. If the connection is still not restored, contact your administrator.

CTI - Server Failure in Phone Task List

Problem: You see **CTI - Server Failure** in your Phone task list.

Solution: The message informs you that there may be a Telephony issue. To fix this problem, reset your softphone by right-clicking and selecting **Softphone - Reset**. If the problem persists, log out of Avaya Agent and log back in.

If you still see the CTI - Server Failure message when you log back in, contact your administrator.

Agent State Changed When Logging In After Server Error

Problem: After a Telephony Server failure, you log out and log back in. Your Voice channel is not in the same state that it was in before the server error.

Solution: Your Voice channel will be in the state that it is always in when you log in. Change your state back to what it was before the error. If you were in WrapUp state before the server error, select the voice contact and enter the necessary data in the **Wrap-up** dialog box or the Prompter script. You will need to re-enter any data that was not saved before the server error.

Unavailable for Voice After Server Error

Problem: You see **Core Server(s) Failure Notification** dialog box and you click the **Retry** button. When the connection is restored, you click the **Agent** button and the icon changes to **Available**. However, the Status Control bar shows that you are still Unavailable for Voice.

Solution: Contact your administrator.

Solution: To fix this problem, reset your softphone by right-clicking and selecting **Softphone - Reset**. If the problem persists, log out of Avaya Agent and log back in.

If you are still listed as Unavailable for Voice when you log back in, contact your administrator.

Cannot Answer a Consult Transfer

Problem: In the situation described below, you may not be able to complete a Consult Transfer to another agent, or another agent may not be able to complete a Consult Transfer to you. (Consult Transfers are described in Involving Other Agents in a Voice Contact on page 90.)

1. An agent tries to transfer a voice contact to you with the Consult feature, but for some reason cancels the transfer.
2. You get a **Wrap-up** dialog box for the transferred contact but leave the dialog box open.
3. The same agent tries again to do a Consult transfer to you.
4. You cannot answer the call because the **Answer** button never becomes enabled.

Solution: You must click **OK** in the **Wrap-up** dialog box. Then you will be able to answer the call.

Softphone Stops Responding

Problem: Softphone may not be able to perform a telephone operation or it may appear to be "locked up" for a certain length of time.

Solution: If you use both your physical telephone and Softphone, the problem may be that your Softphone and your physical telephone are set differently. To stop this problem from happening again, ask your administrator to confirm that the preset state settings for your physical telephone and Softphone are identical.

In other cases when your Softphone fails, you must take the following steps to re-establish and synchronize the connection between Softphone and your physical telephone.

To reset the communication between your Softphone and the telephone:

1. If you are in a voice contact, complete your voice contact with the physical telephone.
2. Set your agent state to Unavailable. For information, see Changing Your Agent State on page 51.

   Note:

   The **Softphone - Reset** option clears all current activity from the Softphone and terminates all calls. You must complete Steps 1 and 2 before using **Softphone - Reset**.

3. Right-click in an empty part of the Avaya Agent.
4. In the pop-up menu, click **Softphone - Reset**.
5. Click **OK**.

If this does not resolve the problem, contact your administrator.

Outbound Contact Problems

You may have the following problems when managing your Outbound Contact calls. Carry out the listed solution for each problem.

- Avaya Agent Stops During Outbound Contact Calls
- Error Message During Outbound Contact Calls
- No licence available for Outbound Contact
- Network communications error after log in

Avaya Agent Stops During Outbound Contact Calls

Problem: The Avaya Agent suddenly stops working or suddenly exits while you are making calls with Outbound Contact.

Solution: Take the following steps.

To restore Avaya Agent and return to your Outbound Contact jobs:

1. Exit from Avaya Agent if it is running and if you exit.

   Note:
   If you cannot exit from the Avaya Agent, open the Windows Task Manager and end the application task.

2. Log in to Avaya Agent.
3. If you get an error message when trying to log back in, wait a moment and then try again.
4. Change your agent state for the incoming media channels.
5. Select and join jobs, as you did before.

Error Message During Outbound Contact Calls

Problem: Occasionally, when handling Outbound Contact telephone calls, the contact center's Telephony Server may shut down and restart while you are handling an Outbound Contact call. When this occurs, Avaya Agent displays a Core Communication Failure Notification in a dialog box.

Solution: To rejoin your Outbound Contact jobs, take the following steps.

To continue handling predictive outbound calls:

1. End your conversation with the customer normally and hang up the call using the physical telephone.
2. In the error message dialog box, click **Retry**.
3. If the application displays a dialog box with additional notification messages, click **Retry**.
4. Log in to Outbound Contact. Complete Steps 4a through 4c.
   a. Click the **Media** tab.
   b. Click **Agent** until the button changes to **Aux-work** (Busy).
   c. Click the **Outbound Contact** tab.

5. Select the jobs you were working on, as follows:
   a. Select the jobs from the **Available jobs** field.
   b. Click **Join Job**.
6. Click **Off Break** on the toolbar to receive outbound calls.

No licence available for Outbound Contact

Problem: When you log in to Avaya Agent, you receive a message box that states there is no license available and that asks you whether you want to continue to log in.

Solution: Take the following steps.

Tip:

If you select the **No** option and receive a network communications error from Outbound Contact, see Network communications error after log in on page 228.

To log in to Outbound Contact:

1. Select the **Yes** option to stop the current log in attempt.
2. Log back in to Avaya Agent.
3. If you receive the same message box, advise your supervisor that you cannot work in Outbound Contact because there is no license available.

Network communications error after log in

Problem: After you log in to Avaya Agent to work on an Outbound Contact job in automatic dialing mode, all buttons on the Outbound Contact toolbar are available, including buttons for preview dialing mode. However, when you select a button, you receive the following error:

> Critical Error: A critical network communications error occurred. Either a communication error was between the application and the dialer or within the dialer. Retry the action. If this error occurs again, contact your system administrator.

Solution: This error typically appears when you log in to Avaya Agent when no licenses are available.

To resolve network communications error in Outbound Contact:

1. Log out of Avaya Agent.
2. Log back in to Avaya Agent.

3. If you see a message box that states there is no license available, select the **Yes** option to stop the current log in attempt.
4. Advise your supervisor that you cannot work in Outbound Contact because there is no license available.

Avaya Agent on Citrix Problems

Problem: You can have an issue with maximizing Avaya Agent after you minimize the application.

Solution: To resolve this issue:

1. Right-click on the minimized Avaya Agent application.
2. Select **Close** from the menu.
3. When Avaya Agent maximizes, in the dialog box that asks to confirm the exit, select **No**.

All future minimization and maximization actions of Avaya Agent will work as expected.

Index

A

B

C

D

E

F

P

Q

R

S

T

U

V

W