

IFS Customer Engagement 23R1 GA

Agent Desktop User Guide



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1

Getting Started

Contact centers use IFS Customer Engagement Agent Desktop to provide a unified workspace for agents who:

- Handle a wide range communications, such as phone calls, email, chat, sms, social media.
- Need to access data from different systems.
- Need a range of applications designed for the variety of tasks they perform.

In Agent Desktop, all the tools you need are in one place on the toolbar and the desktop itself changes depending on the current task.

For a quick overview of Agent Desktop, please read this guide. Your supervisor will be able to tell you about the tools on the desktop.

Signing on



1. Go to the link provided. Agent Desktop opens. You should sign in automatically if you have already signed in using your Windows account.
2. Once you are signed in, your status is **Do Not Disturb** and the Agent Desktop status is `Idle`.



There are three possible states:



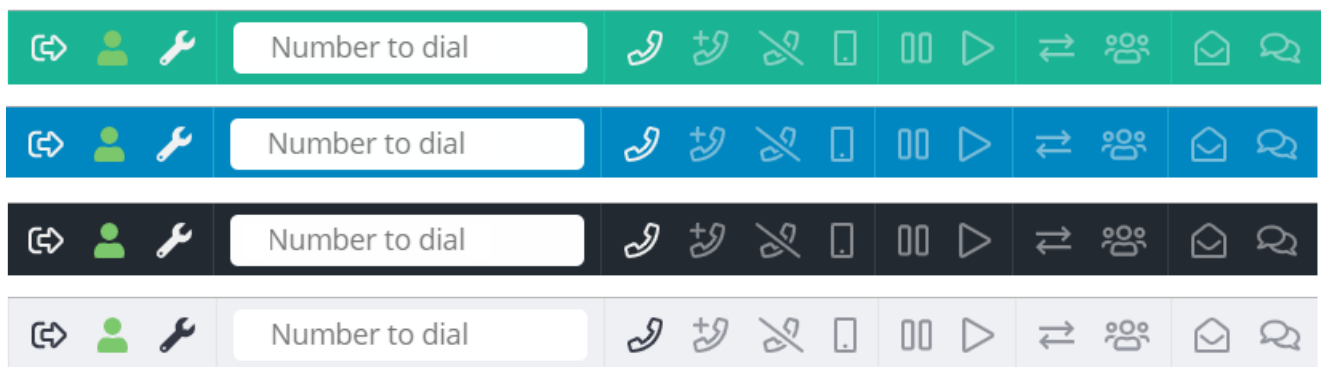
Available — indicates that you are available to receive *activations*. An activation can be a voice call, an email a chat message or a social media activation (this depends on the contact center). The different activation types queue at different priorities. This means that you will typically answer voice calls before any emails in the queue.

	<p>Signed In (Busy) — indicates you are working on an activation. You won't receive any other activations until you wrap up the current activation.</p> <p>Depending on the contact center, you may receive multiple additional chats.</p>
	<p>Do Not Disturb — indicates one of the following:</p> <ul style="list-style-type: none"> You weren't able to accept the activation in time. You'll receive another activation after a short interval. You're unavailable (for example, you're on a break). You're working offline.

Choosing a theme

You can personalize Agent Desktop to suit your own preferences. You can change the appearance of the toolbar.

The color:



The icon style, either line style (left) and pill style (right):



And whether the activation tools shake (flash) when an activation is presented to you.


















To choose a theme, click  and then go to the **Theme** tab.

















Your preferences are saved automatically. At any point, you can change them again.

About the toolbar

Nearly all the tools for working in Agent Desktop are on the toolbar.







Note: You can press the tab key to move between the tools in the toolbar and return key to select the tool

Tool	Description
 Home	Switch between the Home page and other pages such as Monitoring and Address Book. When you are in an activation shows the name of the contact center unit.
	When you finish working in Agent Desktop click to sign out.
	Your status. Green means that you are able to accept the next activation.
	Click to wrap up the current activation.
	Shakes when a call arrives. You may need to click to accept it or press tab to move to the tool and press return key. Click  to end the call and then  to wrap up.
	Enter the number you want to dial and click to make the call.
	Click to end the current call or chat session.
	Click to open a keypad to use while on a call that has an IVR menu.
	Put the call on hold and then click to retrieve it.
	Transfer the call.
	Set up a conference call.
	Shakes when an email arrives. Click to accept it. Shows as green while you are working on it. Close and wrap up the email using the button.
	Shakes when a new chat session starts. Click to accept it. Shows green while you are working on it. Click  to end the chat and then  to wrap up.

Tool	Description
	<p>Changes to one of these depending on the type of social media message.</p> <ul style="list-style-type: none">  (Facebook) and  (Facebook Direct Message)  (Twitter), and  (Twitter Direct Messaging)  WhatsApp  SMS <p>Click to accept the message, which then shows green while you work on it (as in the WhatsApp example above).</p>
	Shows information about the current activation, such as the inbound call number and the contact center code.
	Send messages to other agents. For supervisors, the monitoring and coaching tools.
	Shows the address book and the skills of the agents currently working in Agent Desktop.
	Messages appear here. Click  to send and reply to messages from other agents.
	Hover over this to see whether telephone delivery is available. Tool is <i>white</i> when you are on a call. To see the caller's number, hover over any of the voice tools.
	Always use this if you need to refresh the screen. Don't use the Refresh button in the browser.
	Is green when Agent Desktop is connected and flashes when Agent Desktop is reconnecting.
	Go to the Agent Desktop settings, for example to set the theme and check your audio options.

Current information

The following section of the toolbar shows information about the activation you are currently handling, and about call volumes in Agent Desktop.

Area	Tells you...
	<p>The Agent Desktop status or the current state of the activation you are working on. Some common states are:</p> <ul style="list-style-type: none"> • Idle: waiting for the next activation • Ringing: an activation has popped on the screen but you haven't accepted it yet • Chat or E-mail: working on an activation • Wrap Up: completing work on an activation
	<p>The Agent Desktop status and the time in this state. Resets when the status changes.</p>
	<p>Number of emails and other work waiting in the queue. Work objects depend on the contact center but a common type is a callback or ring back.</p>
	<p>Number of callers waiting in the queue. This includes both voice and chat.</p>
	<p>Number of active outbound calls.</p>
	<p>Number of active inbound calls.</p>

Note The number of items in the queue exclude the activation that's popped on your screen. The number(s) increment again if you are unable to accept the activation.

Signing off

Always sign out by clicking the **Sign Out** button:



This means that no activations are delivered to you in the interval between leaving or closing the browser and before the server terminates your session.

2

Answering and making phone calls

This describes the tools for handling calls in Agent Desktop.

Note Agent Desktop is often configured to automatically answer incoming calls. Typically 3 seconds. You don't need to click the tool to connect the call.

Where softphones are used (typically VoIP) then Agent Desktop will ring and you are automatically connected.

Where hard phones are used (desk phone), your desk phone will ring and the call is automatically connected when you pick up the handset.

Answer and hang up

1. When you are in **Idle** status, the next phone call in the queue pops on your screen. It shakes to catch your attention:



A message shows the caller's CLI, the name of the contact center unit and possibly the greeting message that you should use. Close the message.

2. You are automatically connected and the **Answer** button dims:



The Agent Desktop status changes to **Inbound Call** and your personal status changes to **Busy**:



Note If you are not automatically connected then click to accept the call and speak to the caller. If you're unable to accept the call within the time period set for your contact center, you're temporarily put into **Do Not Disturb** status. There will be a short delay before the next activation pops on your screen.

- When you finish speaking to the caller, end the call by clicking **Hangup inbound call** on the toolbar (or the equivalent button on the desktop):



The Agent Desktop status changes to **Wrap Up**. Finish any work and once you've done, click **Forced Wrap Up** (or the equivalent button on the desktop):



- You're now back in the **Idle** status and ready for the next activation:




The Agent Desktop redisplay the main page.

Dial out and using the phonebook

You may be able to make outbound calls. If you have this facility then the **Dial Outbound Call** tool is active:




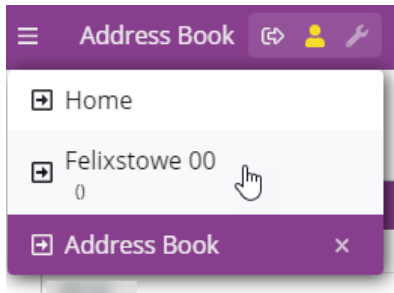
Note for supervisors. To enable dialing from idle , the agent must have a default contact center unit configured in their user profile (in the Admin Portal this is the **Default Associated Client Account** field).



Dial someone in the address book

You may be able to dial out from the Address Book:

- Click .
- Go to **Phonebook**.

3. Click **Dial** next to the contact name.
4. You can switch between the phonebook and the current call by clicking  – the current call is identified by the name of the contact center unit.



To switch between the call and the Address Book, click . To go Home, you need to click  to close the Address Book.

DTMF keypad





When a call is connected, click **DTMF keypad** to open a DTMF keypad and play DTMF tones. DTMF tones give softphone users the ability to navigate call systems where, for instance, you press 1 for sales and 2 for service.

Transferring a call to a different team (skillset)

You can dial an agent who has a particular skill, either to talk to them or to transfer the call to them.

Note If someone dials you then the call pops on your screen like any other inbound call. You will see the details of the call and the call is either answered automatically or you need to accept the call. Like any other call, you need to hang up and then wrap up.

To dial a skillset:

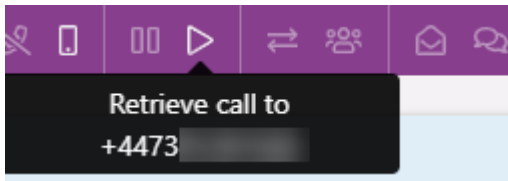
1. Put the inbound call on hold.
2. Click .
3. Go to **Queues**.
4. Click **Dial** next to the skillset.
5. You can immediately click  to transfer the call or you can wait for someone to answer first.
6. After transferring the call, you need to wrap up in order to go back to the **Idle** status.

Hold and retrieve calls

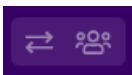


Use **Hold** and **Retrieve** to put callers on hold and then retrieve the call.





Also, when you transfer a call to someone else (an enquiry call) use **Retrieve** to toggle between the inbound caller and the person you are attempting to retrieve the call from. Hovering the mouse over the button will tell you whether you will retrieve the inbound call or the enquiry call:



Transfer call and conference calls



Click **Transfer** to transfer a call:


1. Put the caller on hold.
2. You can do any of the following:
 - In the **Number to dial** box, enter the number to which you want to transfer the call
 - Click  to go to the Monitoring page and then click **Dial** next to the name.
 - Click  to go to the Phonebook and then click **Dial** next to the name.
 - Click  and then click **Queues** to see a list of skillsets. Click **Dial** next to the skillset.
3. You can immediately click  to transfer the call or you can wait for someone to answer first. After transferring the call, you need to wrap up in order to go back to the **Idle** status.

The Conference Call tool allows you to connect all three lines (yours, the inbound call and the enquiry call) before making the transfer.

Audio connection options and settings

Use the **Options** tab to retrieve a call when you've temporarily lost the audio when the call was delivered to you. For example, when the call drops out or was diverted to voicemail.

To do this:

1. Click .
2. Go to **Settings > Options**.
3. Click **Connect**. This will not disconnect the caller.

You can also use this pane to test your audio connection or to disconnect a *nailed-up connection*.

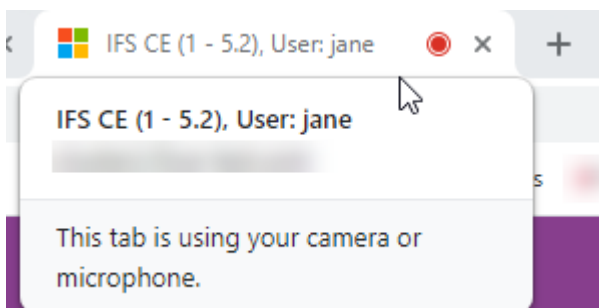
1. Select one of your configured connection options.
2. Click **Connect** to test the connection. Your number will ring. For **Dial Integrated VoIP Number**, the red symbol on the tab will flash briefly.
3. Click **Disconnect** to hang up.

When testing the connection, you are automatically disconnected after 20 seconds. This does not apply for user accounts that are configured for a *nailed-up connection*.

You can swap the connection mid-call if you need to.

Dial Integrated VoIP Number

Select the **Dial Integrated VoIP Number** Audio Connection Option to make and receive calls through the Chrome browser. The browser must be allowed access to the microphone. The following shows that Chrome is set up correctly for calls (the red symbol on the tab) — note that Agent Desktop *never* uses the camera:



Important Calls will fail if the microphone is blocked or if it is set to prompt for access to the microphone. In this case, you are put into DND mode as you are not able to take voice calls.

3

Handling emails and social media

This explains how to handle emails in Agent Desktop — social media messages are similar :

1. When you are in **Idle** status, the next email or message in the queue pops on your screen. It rings (same sound for all activation types) and the tool shakes to catch your attention:



Details of the email are shown on the desktop. On the right of the toolbar, the Agent Desktop status is **Ringling**.

2. Click to accept the email – the **Email** button turns green:



The Agent Desktop status changes to **E-mail** and your personal status changes to **Busy**:



Note If you're unable to accept the email within the time period set for your contact center, you're temporarily put into **Do Not Disturb** status. There will be a short delay before the next activation pops on your screen.

3. Work on the email and, when you've finished, click **Close and Wrapup** on the Agent Desktop desktop. Skip this step if you are unable to complete the task and need to transfer the email to someone else.
4. After transferring the email to someone else, click **Forced Wrap Up**:



The Agent Desktop status changes to **Wrap Up**.


If you didn't close the email then the email is left in the queue.

5. You're now back in the **Idle** status and ready for the next activation:



The Agent Desktop redisplay the main page.

Putting the email back on the queue

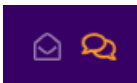
To leave the email in the queue without saving or closing it, just click . The email will remain in the queue for another agent to pick up.

4

Handling chat

This explains how to handle a chat caller. You may be able to handle several simultaneous chat sessions.

1. When you are in **Idle** status, the first message from the next chat caller in the queue pops on your screen. It rings (same sound for all activation types) and the tool shakes to catch your attention:



The caller's initial messages are shown on the desktop. On the right of the toolbar, the Agent Desktop status is **Ringing**.

2. Click to accept the new chat caller – the **Chat** button turns green:



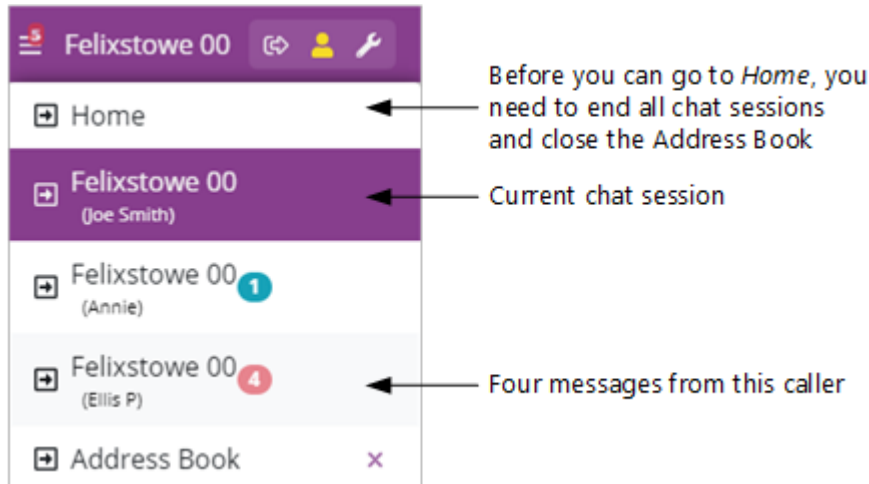
The Agent Desktop status changes to **Chat** and your personal status changes to **Busy**:




Note If you're unable to accept the chat within the time period set for your contact center, you're temporarily put into **Do Not Disturb** status. There will be a short delay before the next activation pops on your screen.

3. You can now reply to the caller's message. Note that the caller only has a certain number of seconds between messages before the chat is closed automatically.

Click  to switch between chat callers:



New chat sessions always pop immediately on your screen so you can accept them. When this happens, accept the activation and then click  to go back to the chat you were working on when the new one popped. If you do not want to accept the activation then put yourself into Do Not Disturb.

4. When you have finished, end the chat session by clicking **Hang Up Call** on the toolbar (or the equivalent button on the desktop). This sends a *Chat ended* message to the caller. You don't need to do this if the other person ends the chat:



The Agent Desktop status changes to *Wrap Up*. Finish any work and once you've done, click **Wrap Up** (or the equivalent button on the desktop):



5. You're now back in the **Idle** status and ready for the next activation:

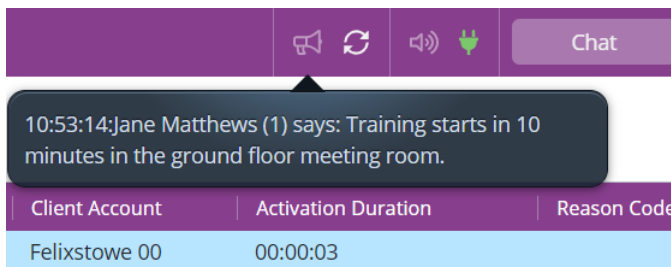


The Agent Desktop redisplay the main page.

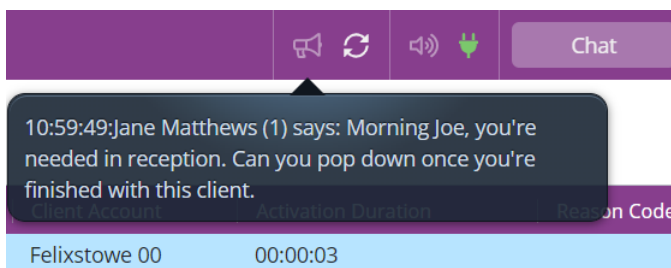
5

Messaging

You can send messages to individuals or to all agents who are signed in. Agents can reply to your message, however, the app is not intended for conversations.



Messaging all the agents who are signed in





Messaging an individual agent

Note The number in brackets is the station number of the agent sending the message.

Sending and replying to a message

To send or reply to a message:

1. When the Notifications Area  icon shakes, there is a message waiting for you.


2. Click **Monitoring** .
3. Click **Notifications**.
4. To message an individual, select their name from the list. To message everyone, click **Send message to all**.
5. Type in your message and click **Send**.

The message will immediately appear in the notifications area of the toolbar.

All replies to your message appear in the same area, in the order in which they are sent.

Going back to the current activation

To go back to the activation you are working on when you are on the Monitoring page:

1. Click  (top left).
2. Select the name of the contact center from the list.

6

Do not disturb

Do Not Disturb status tells Agent Desktop that you are busy or away from your desk, and therefore unable to receive any activations. The Agent Desktop status is `Idle`.

Automatically going into Do Not Disturb status


If you weren't able to accept an activation quickly enough, Agent Desktop will temporarily change your status to **Do Not Disturb**:

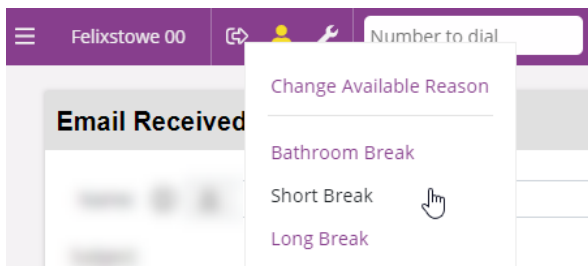



After a short interval, maybe a minute, another activation will pop on your screen. If you are unable to accept any activations for the moment then you can change your status to **Do Not Disturb** (see below).


Choosing Do Not Disturb status when busy or away

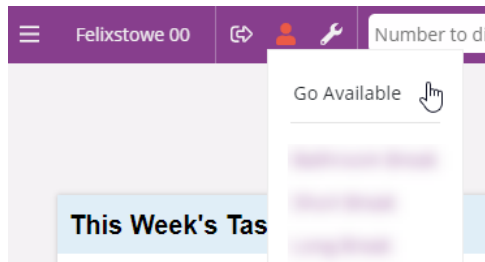
When you are busy or you need to leave your desk, you can choose to go into **Do Not Disturb**.

1. Click . This changes your status to **Do Not Disturb**. Depending on the contact center, you may need to choose a reason first:



When you switch between tasks, and want to remain in **Do Not Disturb**, you may need to click  and change the reason.

2. When you're finished, and ready to receive the next activation, click  or select **Go Available** from the list.



7

Working offline (forced wrap up)


Depending on the contact center, you may be able to work offline. This means that:

- No activations will pop on your screen.
- The time is not reported as a break or absence (so distinct from **Do Not Disturb**).
- You will still see messages.
- The page you go to may depend on the option you select, such as **Normal** or **Offline Entry**.

To work offline:

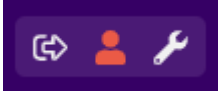
1. Before you start you need to be in the `Idle` state:





2. Click **Forced Wrap Up** .
3. Enter the name and code of your contact center and select one of the types — ask your supervisor what to enter here:

A screenshot of the 'Forced Wrapup' dialog box. It has a purple title bar with a close button. The form contains a 'Contact Center Unit' field with 'Felixstowe 00' entered. Below it are radio buttons for 'Type' with options: 'Normal' (selected), 'Offline Entry', 'Training', and 'Demo'. An 'Options' field contains the text 'e.g. CLI=123'. At the bottom right are 'Ok' and 'Cancel' buttons.

The Agent Desktop status changes to `Wrap Up` and your personal status changes to **Do Not Disturb**:



4. When you are finished, you can:

- Either click  to go back to the `Idle` status — after a short interval you'll get another activation.
- Or click  and if necessary select **Go Available** — you will immediately go back to `Idle` and get another activation.

Note Your supervisor can also end your offline status.

8

Supervisors

The following information is of particular interest to supervisors.

Browsers

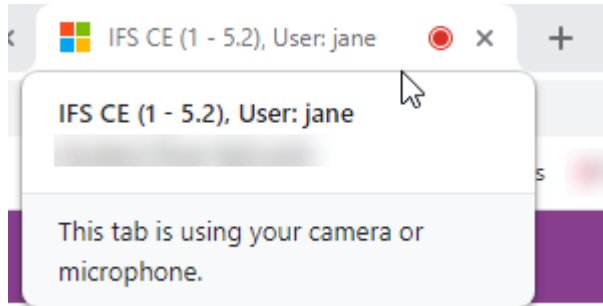
Agents need to use one of the following browsers — either the latest version of the browser or a very recent version:

Browser	Audio connection options	
	Integrated VoIP client	Work, home or mobile numbers (PSTN, Twilio or Custom trunk)
Chrome	Yes ¹	Yes
Firefox	No	Yes

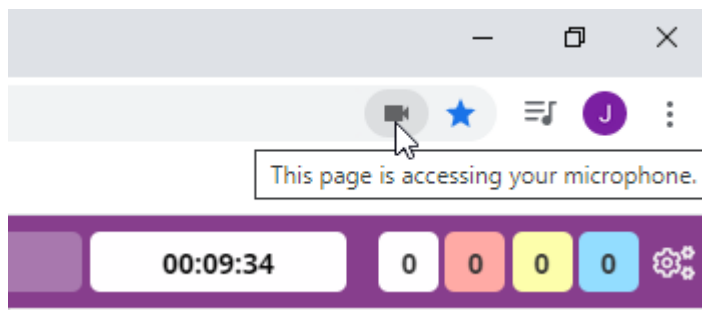
Notes

1. When using Chrome with the **Integrated VoIP number** option then the *Site settings* in Chrome for Agent Desktop must allow access to the microphone. The **Ask before accessing** permission is not adequate.


When configured correctly the browser tab looks like this:




And a camera symbol appears to the right of the address bar:



To test that the browser is configured correctly:

- a. Click  and go to the **Options** tab.
 - b. Make sure that the option **Dial Integrated VoIP Number** is selected.
 - c. Click **Connect**.
2. If any browser closes or crashes during a call, then you can restart the browser. Provided that you return to Agent Desktop within two minutes, you should resume from where you were, although data may be lost.

Important Do not refresh the Agent Desktop by clicking Reload in the browser. You must use the Refresh button  on the Agent Desktop toolbar.

Monitoring and coaching


The following is only available to agents who have “enable monitoring and coaching” selected in their user profile.

- **Monitor** allows you to listen to the agent when working on an activation (calls and other activation types) without the agent being able to hear you.
- **Whisper** allows you to listen to the agent while he or she is on an active call, and prompt the agent. If it is a voice call then the caller cannot hear you. You cannot use Whisper once the agent is in wrap up status.

- **Assist** allows you to join an active voice call.

To use the coaching tools in Agent Desktop:

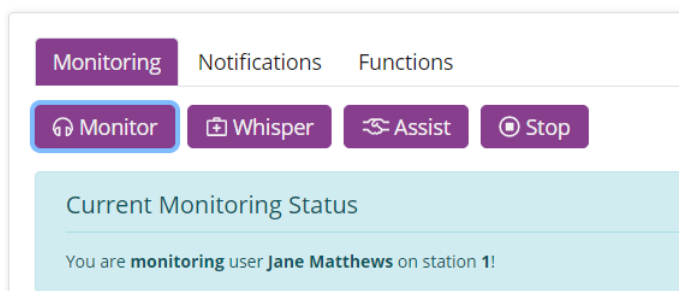
1. Click **Monitoring** .

A list of all agents and their current state is displayed. The page does not update automatically—the number of seconds since the last update is shown. To update it, click **Refresh** on the page or  on the toolbar.

2. Select an agent. Their current status is shown on the left. This includes the contact center unit when the agent is working on an activation. A reason code is shown when the agent selects a reason for going into Do Not Disturb mode.

There is one entry for each activation. This means an agent may appear more than once if they are handling multiple chat callers.

3. Click the monitoring option you require:




The session is presented to you through the same route as calls would be delivered, that is the phone will ring and when you pick up, the monitoring session begins. Monitoring is therefore not available if there is no audio connection.

You can switch modes mid-session.



4. To end the session, click **Stop**. The session also ends when the agent goes to the wrap up status.

If the coaching tools are unavailable, check that you have selected the correct agent on the Monitoring page.

Dialing an agent


To dial an agent who is available, click  to go to the Monitoring page.


Select an agent and then do one of the following:

- Click  in the table.
- Click **Functions** and then .

Ending wrap up or logging off an agent

You can take an agent out of Wrap Up or log them out of Agent Desktop. When logging out an agent, you must have same or higher user role that the agent.

1. Click  to go to the Monitoring page.

If you are already on the Monitoring page, you may need to click  **Refresh** to make sure that you see the latest updates.

2. Select an agent.
3. Click **Functions** and then click **End Wrap Up** or **Log Off**.
4. Click **OK** to confirm the end wrap up or log off the agent.

Connectivity status

This shows whether or not the client PC has connection to the iMedia server. It is green when connected and flashes when Agent Desktop is connecting.

ABOUT IFS

IFS develops and delivers enterprise software for customers around the world who manufacture and distribute goods, maintain assets, and manage service-focused operations. The industry expertise of our people and solutions, together with commitment to our customers, has made us a recognized leader and the most recommended supplier in our sector. Our team of 3,500 employees supports more than 10,000 customers world-wide from a network of local offices and through our growing ecosystem of partners.

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