GENESYS

Gplus Adapter User Guide

Handling calls

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Handling calls

The Genesys Gplus Adapter provides you with controls and features that let you handle voice interactions with contacts or internal targets (such as other agents).
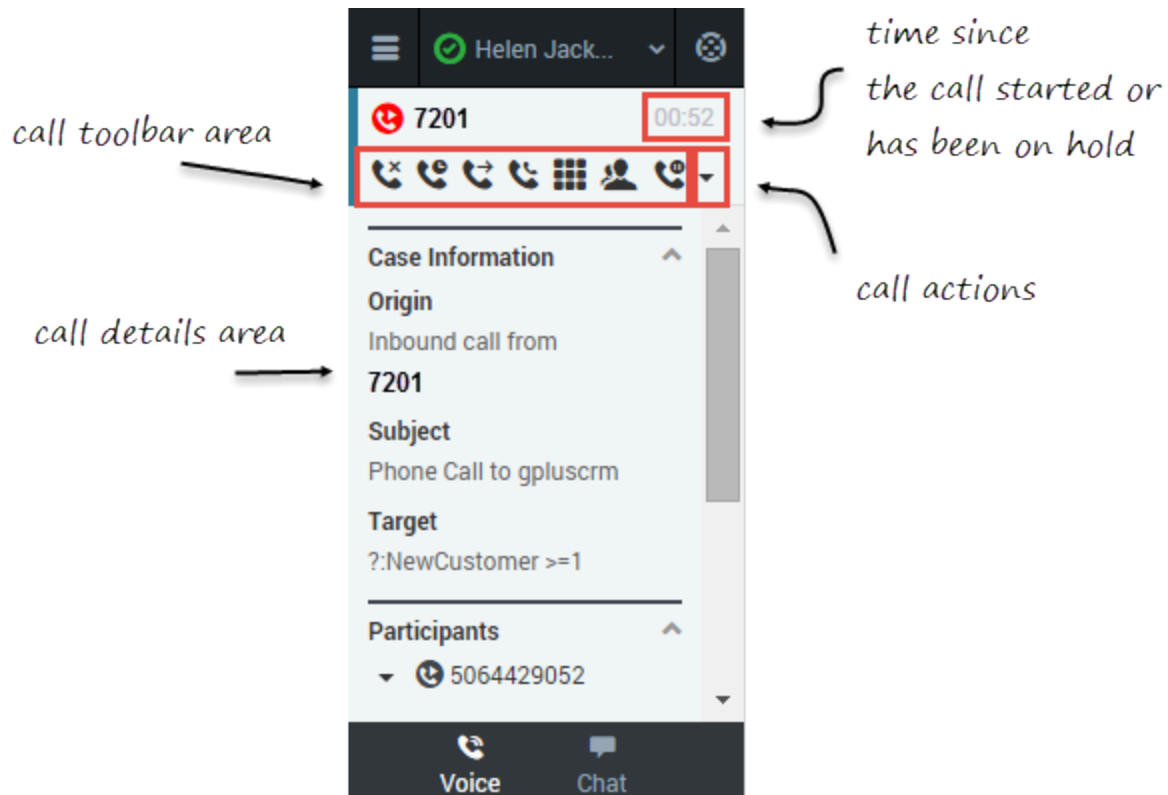
How do I handle calls in the Adapter?

Link to video

When you navigate to the voice media channel, you'll see the default view where you can:

- Handle an incoming call
- Dial a call
- Transfer a call
- Perform an instant conference call
- Initiate a consultation
- Call back a disconnected party
- Record a call

Adapter main view

Once you have an active call—because you called someone or someone called you—the main voice channel view changes to the call view. This view has two main areas: call toolbar and call details.

When you have an active call, the call toolbar displays icons for actions that you can perform during a call. Depending on the Adapter configuration, you might see some or all of the following toolbar icons:

| Icon	Description
	Ends the call.
	Places the call on hold. After the call is hold, the **Retrieve** button is displayed. **Tip** If your contact center is configured to display hold time duration, the call timer in the top-right of the Adapter window resets to display how long your call is on hold. When you take the call off hold, the timer returns to showing the duration of the call again.
	Redirects the call to another contact you select using Team Communicator. See Transferring a Call

Icon	Description
	for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
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	Shows the keypad. You can use this to enter digits when you're navigating voice menus or prompts. Type or select the digits, and then press **Enter** on your keyboard.
	Starts a consultation with another contact before transferring or conferencing the call to that contact. See Initiating a Consultation for details.
	Pauses call recording. See Recording a Call for details.

Call details

The call details view shows you all the data the Adapter has about the call, and it provides fields that you can edit to add more information:

- Case information
- Participants
- Disposition
- Notes

Case information
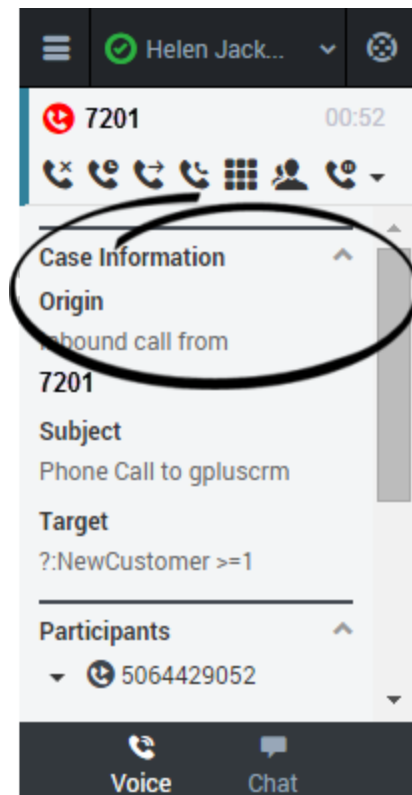
The Case Information section shows you read-only information about the call—the exact information is determined by your administrator.

Here are a few examples of information you might see in your case information view:

- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

Depending how your administrator configured your agent, you might be able to add, edit, or delete case information. For more information, see How Do I Edit Case Information?

Case Information fields might can contain a URL that you can click to access more information.

Participants
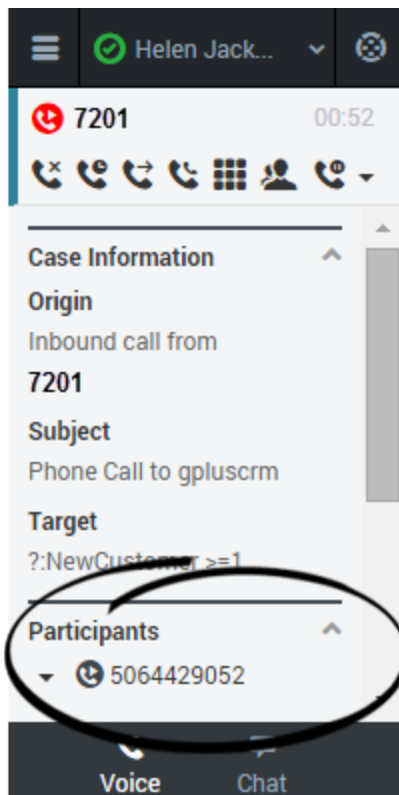
The Participants section shows you read-only information about who else is on the call and the state of the participant (Ringing, Connected, Ended, and so on). This section is especially helpful when you're trying to keep track of who is participating in a conference call.

From the Participants section, you can also call back a participant who was disconnected from the current call. To call back, expand the **Participants** menu, hover over the participant number and click **Call to** action. The call is established as a normal outbound call.

Object association
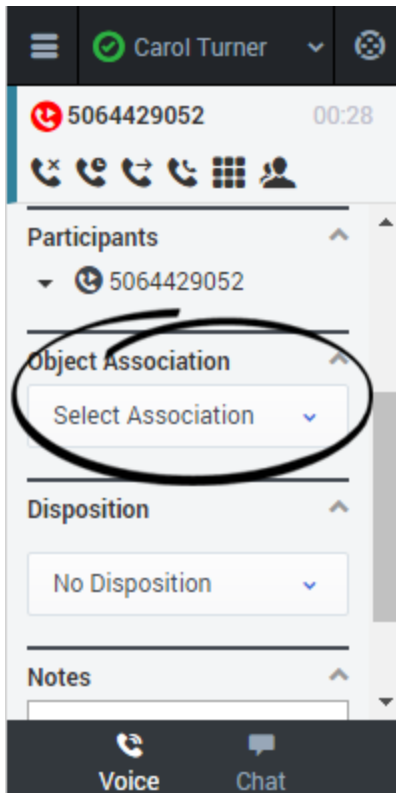
During a call or as part of your after-call work, you can associate the interaction with a Salesforce object, such as a customer record. The **Object Association** menu lists options that are related to the object tabs that are displayed in Salesforce. To understand the connection between the **Object Association** menu and Salesforce objects, consider this scenario:

1. You accept a call from John Smith. Salesforce automatically displays John Smith's information in a tab. In the Adapter, **John Smith** becomes an option in the **Object Association** menu.

2. You then open another Salesforce tab to display information about another customer named Willard Clinton. In the Adapter, **Willard Clinton** is added as another option on the **Object Association** list.

Important

- If your contact center does not permit you to edit case data, the **Object Association** menu is not displayed.

- Avoid opening the Adapter in multiple browser tabs. Object association works only in a single browser tab.

Disposition
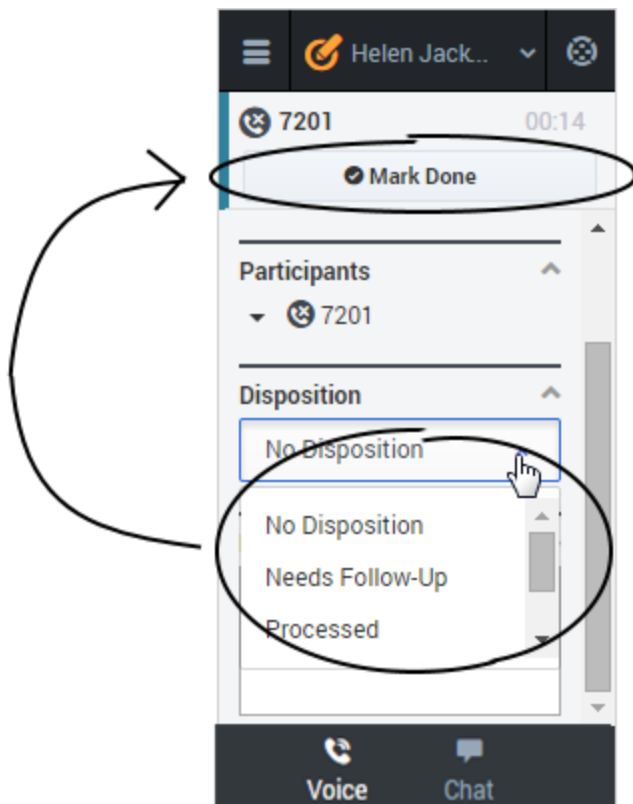
If configured by your administrator, you can change the disposition for a call either during the call or as part of your after-call work. You can use this field to record the business outcome of the call. To update, click the drop-down list, and then select a disposition. Ensure that you don't click **Mark Done** first before you select a disposition. You can't make any further changes after you click **Mark Done**.
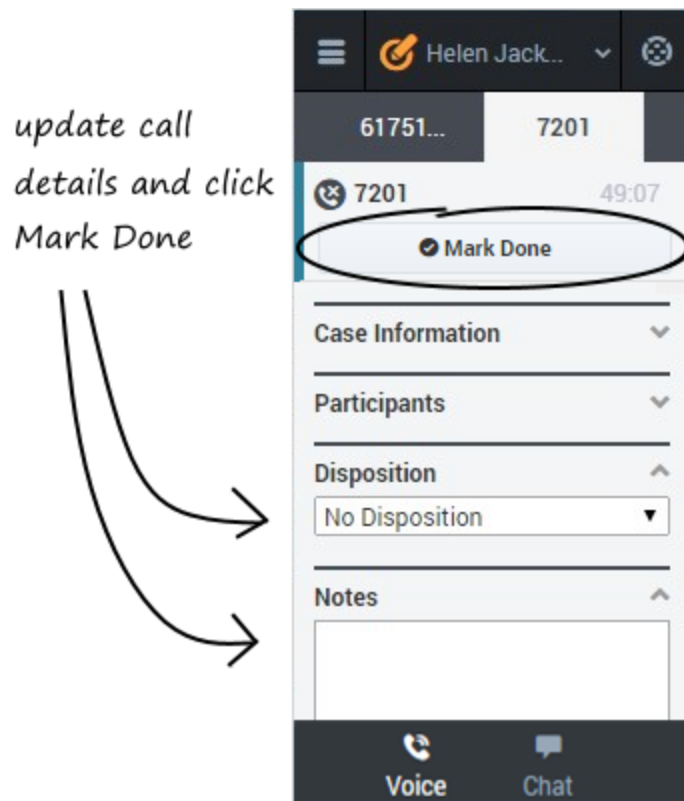
Notes
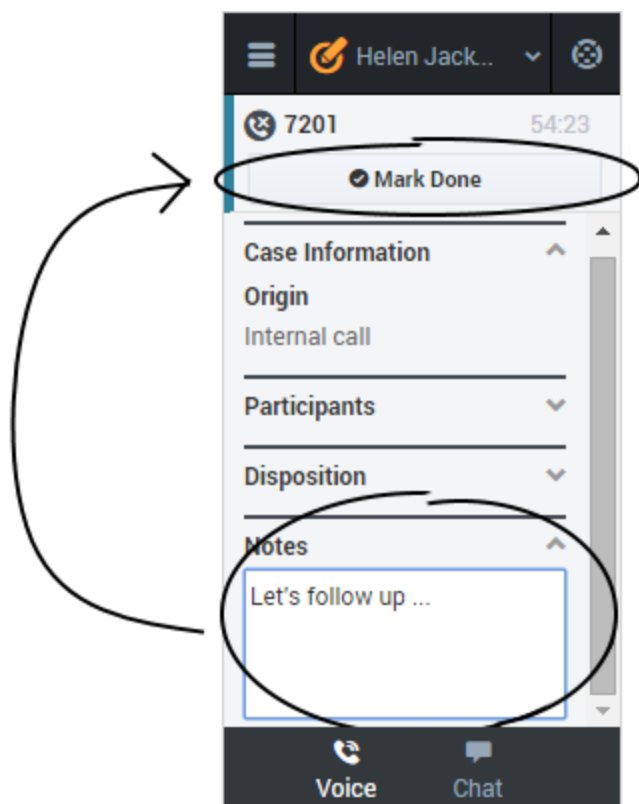
If configured by your administrator, you can add notes either during the call or as part of your after call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Finishing a call

When your call is over, either because the other party left the call or you clicked **Hang up** , you might need to update some information in the call details area (such as disposition or notes). Your Adapter might be configured to automatically change your status to **After Call Work** to give you time to complete this task; if not, you can change the status yourself. Your Adapter might be also configured to automatically mark the call as done as soon as the call is over.

After you finish your after-call work, you can click **Mark Done**, which completes the call and sends you back to the main voice channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or some other value; otherwise, you have to change it yourself.

If you are finishing multiple calls, just click the tab for a call, enter any necessary information in the call details area, and click **Mark Done**. Then, move on to your next call tab.