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Genesys Engage Migration for Echopass Guide

Agent Setup

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Agent Setup

Agent Setup is a cloud-based web application that allows you to manage your cloud-based contact center and agent accounts for products such as Agent Desktop and Gplus Adapters. For more information about Agent Setup, see Agent Setup.

ESM application	Genesys Engage cloud application
ESM EchoAdmin	Agent Setup

Creation of user accounts

You can create single user accounts in the **Users** tab in Agent Setup. To create a single user account, select **Add User** from the **User Actions** drop-down menu.

You can create multiple user accounts in the **Bulk Import** tab in Agent Setup. To create multiple users, use a CSV file to supply the required user data. You can use a template to automatically configure some of the user parameters. If values from the CSV file correspond with values in the template, the values from the CSV file take precedence and overwrite the template values. For more information about Bulk Import, see Importing agent accounts.

Assigning agents to Agent Groups for real-time reporting views

You can configure what agent and contact center statistics are displayed to the agent on their desktop. In the **Statistics** tab in Agent Desktop settings, you can add and edit statistics, import custom statistics, or export all statistics. To configure contact center statistics you must add a resource, such as agent groups, queues, and routing points. After you have added a resource you can add a statistic and configure the options. For more information about statistical reporting, see the *Agent statistics* and *Contact center statistics* sections in Agent Desktop settings.

Manage Users tab

You can manage agents using the options in the **Users** tab in Agent Setup, including adding new accounts, importing agent accounts from an external file, and exporting agents. For information about managing agents, see Agent Setup.

Phone number

You can assign a default phone number to a user. In Agent Setup click the **Users** tab and click a user account to open the **Manage User** screen. Navigate to the **Phone Number** section and select the

Default checkbox for a phone number to make it the default phone number. You can configure the default phone number for a new user or update the default value for an existing user. For more information about phone numbers, see Agent accounts.

Caller ID

You must add at least one identifier to be displayed on the receiver's call display. If you add more than one identifier, the user has the ability to choose which identifier to display. You can also enable an anonymous caller ID for the user. For more information about Caller ID, see Agent accounts.

Wrap Up Time

You can configure Wrap Up Time for an agent. Wrap Up Time is a period of time after the completion of a call that is allotted to tasks such as creating notes or selecting the disposition of the call. For more information about Wrap Up Time, see Agent accounts.

Manage Skills for a single agent

In order to manage skills for a single agent, navigate to the **Skills** link in the **User** tab. You can add any of the skills available in the **Skills** menu, or you can delete previously assigned skills. For more information about managing skills, see Agent accounts.

Manage Agent Groups

You can manage an agent group by selecting a group from the **Agent Groups** list in the **Users** tab. An agent group is a logical grouping of agents that provides particular sets of contact center services. For more information about managing an agent to an agent group, see Agent Groups.

Manage Access Groups

You can assign an agent to an access group, which is a logical grouping of agents that is provided with specific access permissions. For more information about access groups, see Access Groups.

Assign users to sites

You can use agent groups to assign agents from a particular site to the same group. For more information about agent groups, see Agent Groups.

Folders

You can create and manage folders in Agent Setup. You can use folders to organize users into various categories, such as departments or agent groups. For more information about folders, see Contact center settings.

Assign Agent Rights

You can assign agent rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Agent** option to assign agent rights to that user. For more information about assigning rights to a user, see Roles.

Assign Administrator Rights

You can assign administrator rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Administrator** option to assign administrator rights to that user. For more information about assigning rights to a user, see Roles.

Assign Supervisor Rights

You can assign supervisor rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Supervisor** option to assign agent rights to that user. For more information about assigning rights to a user, see Roles.

Reset Password

You can specify that a user receives a prompt to change their password on their next log in. In Platform Administration, go to **Configuration** > **Accounts** > **Persons**, and select a user (or create a new user). In the user information screen, select **Force Password Reset on Next Login**. For more information about resetting passwords, see Users (Persons).

Prompt for Place

You can specify that a user enter a value for place during login by selecting the **Prompt Place** option in the **Global Login** section of Desktop Options. For more information about Prompt for Place, see Global Login options.

Manage Channels

In order to configure channels for the call center, go to **Agent Setup** > **Contact Center Settings** > **Desktop Options** and select the channels for the contact center. For more information about selecting channels for the call center, see Channel options.

Manage Dispositions

Dispositions are descriptions of the final outcome of a call that you can use to flag calls for reporting purposes. You can create and organize dispositions in the **Dispositions** screen in Desktop Settings. For more information about dispositions, see Dispositions.

Bulk upload of Skills with CSV file

You can add a large number of agents at one time using the **Bulk Import** tab in Agent Setup. By importing a large number of agent accounts at one time, you do not need to add the accounts one at a time and you can apply a template to configure options, such as DN, place, person, and login options, to all accounts. You can use a CSV file to provide values for agent configuration. For more information about bulk import of agent accounts, see Importing agent accounts.

Auto Answer Preferences

You can configure voice, chat, and email auto answer preferences in the **Global Login** section of Desktop Options. You can also configure **Voice Auto Ready** status, which places the agent in the **Ready** state as soon as they log in. For more information about configuring auto answer preferences, see the *Global Login* section in Global Login options.

Not Ready Reason Preferences

Auto Not Ready Reason places the agent in Not Ready state as soon as they log in. For more information about configuring Auto Not Ready Reason preferences, see the *Global Login* section in Global Login options.

Additional customizable tabs

You can integrate external websites into the agent Workspace main view. These websites appear in dedicated tabs that allow you to access the external site without leaving Workspace. For voice interactions, the external website displays in the background. For multimedia interactions, the external website displays in a dedicated view in the case data. For more information about external websites, see External URLs.

Configure line display

You can configure the information that is displayed to an agent when they receive an interaction such as a call or chat (toast data), or when an interaction is transferred to them (case data). For more information about Case and Toast data see Case & Toast Data.

Configure global and personal favorites

In the **Contact Center Settings** tab of Agent Setup, you can create a list of globally favorite contacts and internal targets for your agents (such as other agents, team leads, or call routing) in the Team Communicator. In the **Agent Desktop settings** screen, you can specify which favorites to assign. For information about managing global favorites in Contact center settings, see Global Favorites.

In the **User** tab of Agent Setup you can configure personal favorites for individual users. For more information about managing personal favorites for users, see Agent accounts.

Digital Channels

Support for Multimedia Interactions

You can configure agent accounts to support multimedia transactions. It is possible for an agent to use several types of media, such as voice, chat, or email, during the same interaction. For more information about multimedia interactions, see Channels.

Concurrent Chat Sessions

You can conduct multiple chat interactions simultaneously. For example, you might engage in a chat session with a customer and concurrently chat with a supervisor. For more information about concurrent chat sessions, see Chat.

Customer and Agent Typing Notification

During a chat session a notification is displayed when a contact begins typing. A notification is also displayed to the contact when an agent begins to type. In both cases, the text being typed is not visible until the message is sent. For more information about typing notifications, see Chat.

Standard responses

Standard responses are prewritten responses that you can use in interactions. The prewritten responses can be text that you add to an email or chat interaction, or you can speak the text during a voice interaction. For more information about standard responses, see Standard responses.

Select Not Ready Reason Codes

You can configure Not Ready Reason Codes for agents. In Agent Desktop Settings click **Custom Agent States**, navigate to the **[Not Ready]** section and type a **Not Ready Reason** then click **Add**. For more information about selecting **Not Ready Reason Codes**, see Custom Agent States.

Manage ACW Behaviors

You can manage the amount of time allocated to an agent for After Call Work (ACW). In **Agent Setup** click the **Users** tab, select a user, and configure a value in the **Wrap Up Time** field. For more information about configuring the amount of ACW time for an agent, see Agent Accounts.

You can also view the **Agent Activity Business Result** report to retrieve historical ACW data on a per agent basis. Using this report you can view information for the amount of time an agent was in wrap state, the average amount of time per interaction an agent spends in wrap state, and the total amount of times an agent was in wrap state after being consulted on a customer interaction. For more information about the **Agent Activity Business Result** report, see Agent Activity Business Result.

Mail Transcript to Customer

You can configure chat to allow a customer to receive a transcript by email. In **Contact Center Settings** click **Desktop Options**, select **Chat**, then select **Click from Chat to eMail**. Enabling this option allows the customer to click a link in chat to receive a transcript by email. For more information about receiving a transcript by email, see Contact Center Settings.

Email features

- You have multiple options for routing emails:
  - You can route emails on a first-in-first-out (FIFO) basis.
  - You can route emails based on agent skills.
  - You can route emails based on a keyword in the subject line.
  - You can route emails based on a keyword in the email body.

  For more information about routing emails, see Designer.

- You can save emails for up to 90 days in your workbin.
- Emails can be transferred from agent to agent, or from an agent to a queue. For more information about transferring emails, see Email.
- You can use a standard response when you reply to an email.
- You can view emails that you have previously sent to contacts. For more information about viewing previously sent emails, see Contact and interaction history.
- You can send email attachments to customers and receive email attachments from customers. You can also store email attachments that you have received. The maximum size for attachments (either sent

or received) is 5 MB. For more information about email attachments, see Email.

- You can automatically insert customer names into outgoing emails. You can also automatically include items such as greetings, salutations, and signatures.
- Agents can store emails in workbins. The agent retains ownership of the email while it is in the workbin; this allows the agent to perform offline work before responding to the email.
- Workbins can be searched periodically to determine how long the emails they contain have been idle. Emails with idle times exceeding a predetermined threshold can be put back into routing. You can configure the idle time threshold.
- Genesys email supports POP3, SMTP, and EWS connections. For more information, see Email Server.
- You can forward emails to external sources. Forwarded inbound emails are copied as a quote into a new email interaction. You can add comments or other information in the body of the email, above the area that contains the quoted inbound email. For more information about forwarding emails, see Email.
- Supervisors can select emails for review before they are released by the system. The supervisor can approve or reject the email, or send it back to the originator with comments or instructions. If the originator makes changes to the email, the review process repeats. For more information about reviewing emails, see How does email quality assurance work?.

Chat features

- Chat capability for both authenticated and non-authenticated users on a client's website.
- Customers have the ability to manually terminate a chat session at any time, including before an agent has joined the interaction.
- You can assign a nickname to an agent to protect their identity. In the **Desktop options** section of Contact center settings, navigate to the **Chat** section and configure a nickname for the agent.
- You can generate a screen pop that displays customer information in **Agent Desktop**. In the **Contacts** section of Contact center settings you can configure options to display customer information.
- You can specify that chat interactions take place during business hours. You can also configure holidays and special days when chat service is unavailable. For information about configuring chat availability times, see Genesys Designer Help.
- You can differentiate between agent and customer text by using color treatments.
- Genesys Widgets allow you to support and configure multiple languages. For more information about Genesys Widgets, see Genesys Widgets.

  Note: Genesys Widgets documentation is restricted to customers who are enrolled in the Early Adopter Program. Please contact Product Management for enrolling in this program.

- You can push a website link to a customer during a chat interaction.
- You can create a conference between yourself, a customer, and another person in your company. For more information about creating chat conferences, see How do I handle a chat interaction?.
- Supervisors can barge-in on chat interactions. If a supervisor does barge-in on a chat interaction, they are visible to both the customer and the agent. For more information about barging-in on chat interactions, see Supervising agents.
- Chat interactions can be transferred from agent to agent, or from an agent to a queue. For more information about transferring chat interactions, see Chat.

- You can participate in a consultation with another agent. Consultations are not visible to the customer and can occur during an interaction or prior to an interaction. For more information about consultations, see Internal interactions.
- An agent can transfer a chat interaction to another agent, and can assign a priority to the chat interaction that is higher than the priority levels of other chat sessions in the queue. For more information about transferring chat interactions, see How do I transfer an interaction to another team member?.
- You can route chat interactions based on agent skills. For more information about routing chat interactions, see Genesys Designer Help.
- Genesys Widgets can be deployed to a customer website to provide passive and proactive customer support, including Webchat. Webchat allows a customer to initiate a chat session with an agent. The Webchat widget allows users to customize the chat environment by making changes to font and color themes, adding a company logo, or altering the chat window size. For more information about Webchat and Genesys Widgets, see Genesys Widgets.

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