Genesys Engage cloud Supervisor's Guide

Genesys Engage cloud Public

12/29/2021

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Supervisor's Guide

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

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What is the role of a Supervisor?

A supervisor manages agents. For example, they can create agents, assign them skills, and then monitor, coach, and, when necessary, barges in on conversations and interactions to provide further assistance or to evaluate an agent’s performance. As a supervisor, you can also be tasked with other important aspects of contact center operations, such as workforce management, monitoring real-time reporting, and generating reports for managers.

About Genesys Engage cloud

Genesys Engage cloud architecture leverages the world-class SIP-based GVP/Media Services products at the core of Genesys Engage while providing the full Genesys Engage suite of services in the cloud. This offer is customizable to meet the needs of enterprise customers, whether they need a large number of seats, heavy-duty premise system integration, or bespoke routing and reporting. Built on market-leading universal queuing and routing features, the full Genesys Engage suite will add the ability to support blended agents of any type, including blending inbound with outbound, voice with e-Services, or any other combination.

Accessing your Genesys Engage cloud applications

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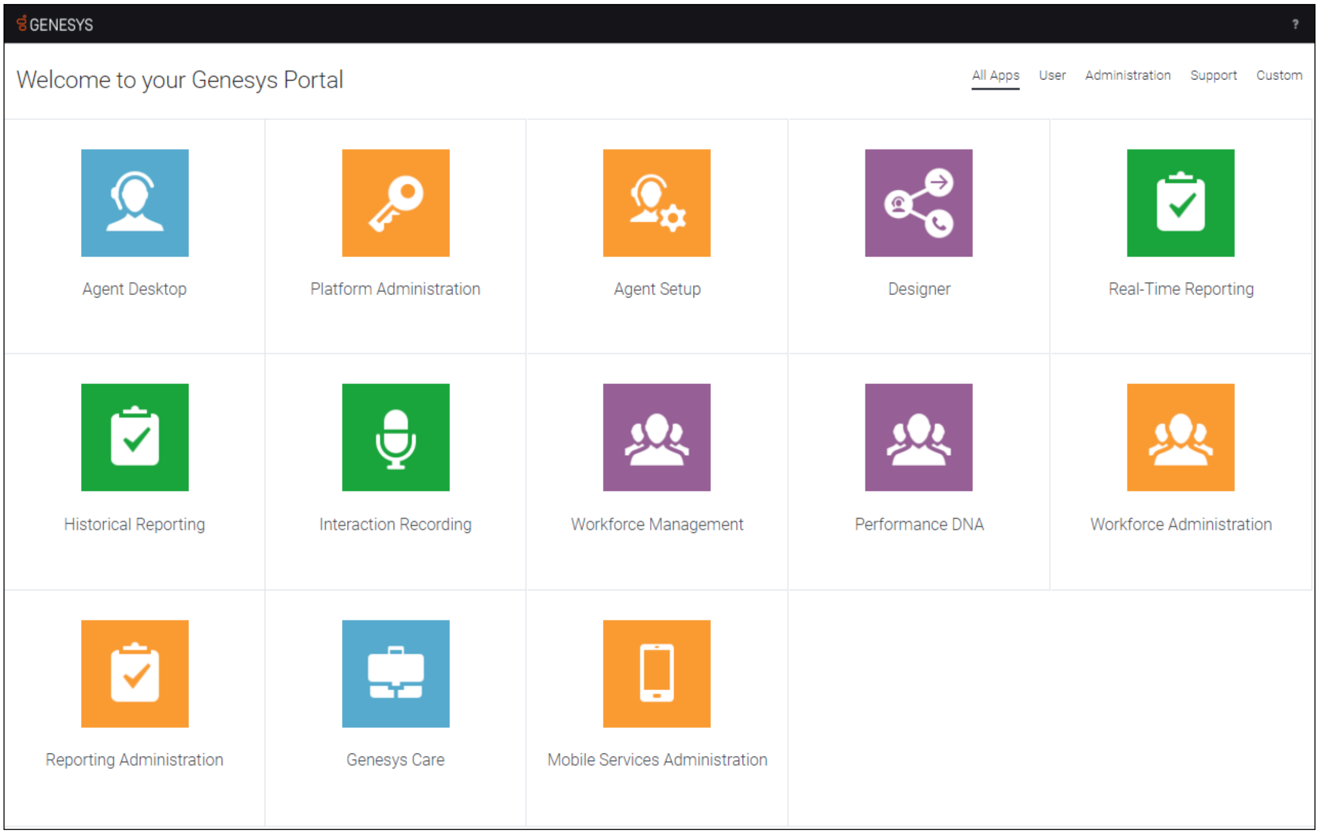
The Genesys Portal is your single point of access to applications within Genesys Engage cloud.

Get started with Genesys Portal



Use your browser to access the Genesys Portal landing page (your Administrator will provide the link).

All of your company's Genesys applications can be found on the **All Apps** screen. These applications are also divided into categories, which you can select by clicking the corresponding category links at the top right of the Portal.

The out-of-the-box categories are:

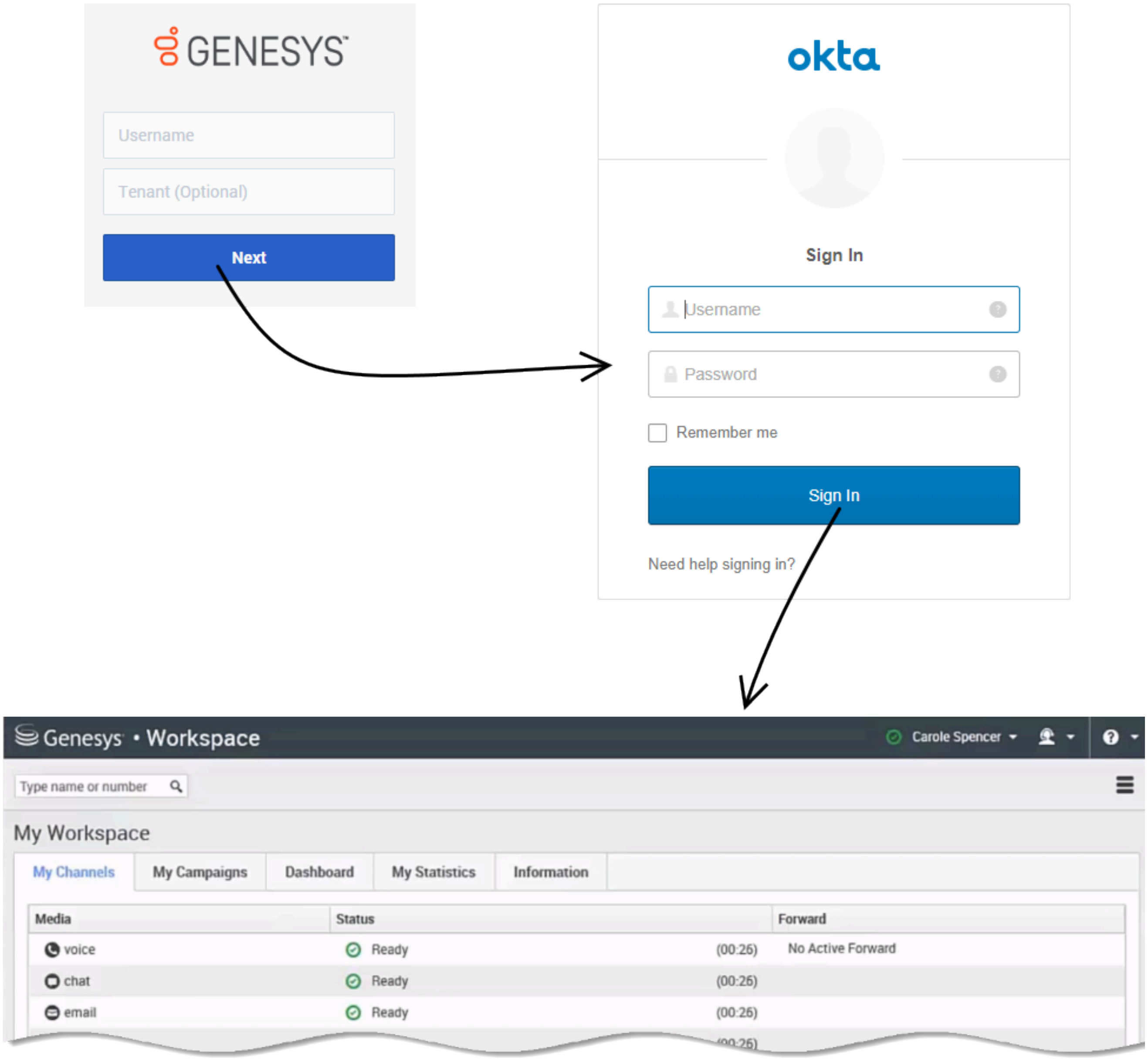
User – User applications can be used by contact-center agents and supervisors, such as Agent Desktop, Workforce Management, and Reporting.

Administration – Administration applications can be used by contact-center administrators and supervisors to configure users and applications based on their roles.

Support – Support applications are used by authorized contact-center administrators to submit requests with Genesys Customer Care, and to view the status and schedule of service for Genesys applications.

Documentation and **eLearning** are accessed via the Help (?) menu, located in the top-right corner of Genesys Portal.

Using the Genesys Single Sign-On feature



Genesys Single Sign-On (SSO) is an optional feature that allows you to access multiple applications with a single username and password. Once you are signed in to one SSO-supported application, you can open all other SSO-supported applications without having to re-enter your login information.

Let's look at the login process for Agent Desktop with SSO enabled.

First, click the Agent Desktop icon in Genesys Portal and enter your username. You must log in to the application even though you're already logged in to your workstation.

Click **Next** and you will be prompted to enter your username and password. Once you are authenticated, you're redirected back to Agent Desktop and automatically logged in.

Now that you're authenticated, you can choose any SSO-enabled application from Genesys Portal and you'll be automatically logged in without entering your credentials.

If you happen to close all browser tabs without logging out of the applications, you will remain logged in for five minutes. If a second window or browser is opened after five minutes, to either the same application or any other SSO-enabled application, you will once again be prompted for your credentials.

Agent Desktop (v8)

Important

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Agent Desktop lets contact center agents communicate with customers and team members through channels such as calls, chats, and email.

If you are looking for the Agent Desktop v9 help, it is here.

Link to video

You can

- respond to or contact customers through the channels assigned to you
- get help from team members
- find standard responses to customer questions
- make sure that you are meeting your center's expectations

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels
- Contact Directory

Lost? See Navigating Agent Desktop.

Are you a supervisor? You can also monitor agents and calls and provide email quality assurance.

Tip

The pictures and videos in this Help document show native Genesys Agent Desktop. Your company might have customized many features including corporate logos and the name of the product. This document uses the name Agent Desktop to mean the application that you use to handle calls and other interactions, and to manage your work and your contacts.

Getting started (v8)

> **Important**
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Agent Desktop is your gateway for handling calls (both inbound and outbound) and other interactions, such as chat or emails.

> **Important**
>
> What you see in Agent Desktop depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

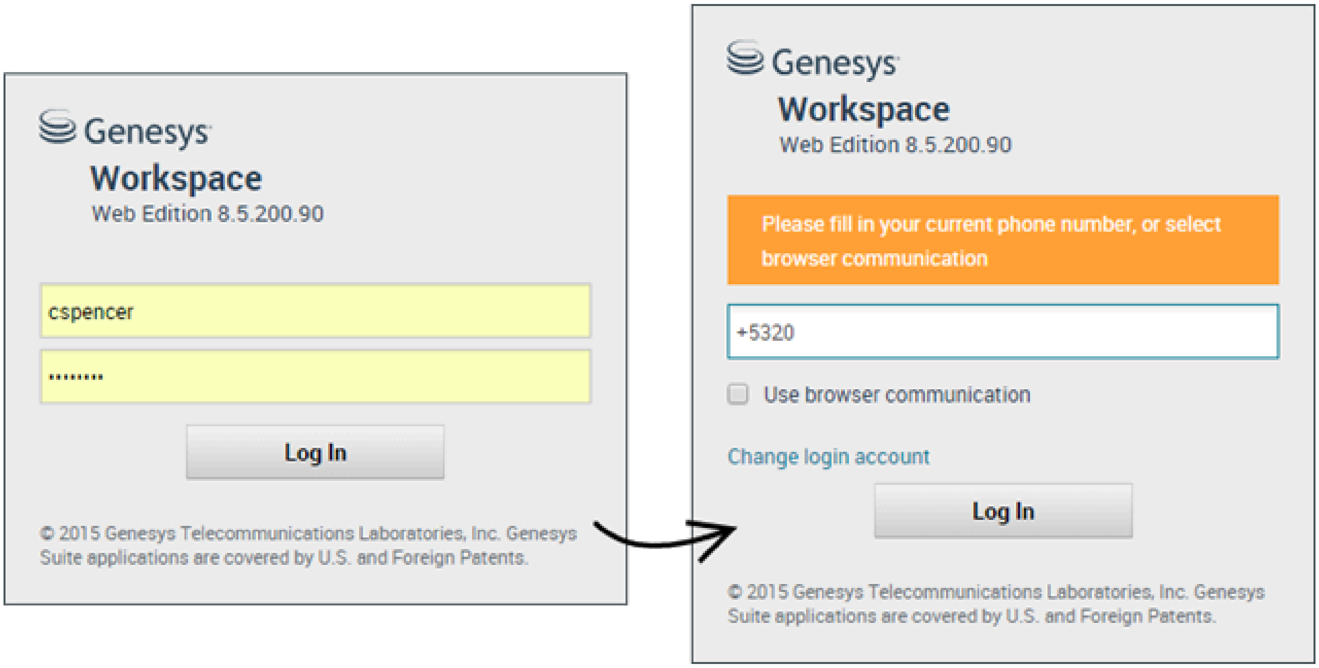
Now that you know what Agent Desktop is, you're probably wondering how to use it. This Getting Started page will get you logged on and ready to take a call. Let's get started.

> **Tip**
>
> - The pictures and videos in this Help document show native Genesys Agent Desktop. Your company might have customized many features including corporate logos and the name of the product.

Agent Desktop video tutorials

Check out this video about how to handle a phone call!	Link to video

Log in to Agent Desktop



Open a supported browser (if you are using browser communication, use Chrome) and go to the link for Agent Desktop that your supervisor gave you.

Log in with your username and password. You might also have to enter some additional information:

- If prompted, enter your phone number, place, or preferred language.
- If your system uses browser communication, select **Use browser communication**.
- If this is your first time logging on, you might have to change your password.

If you are not sure about any of the prompts, ask your supervisor for help.

Tip: Clicking **Change login account** takes you back to the main log in screen.

Tip: Agent Desktop has a security feature that might be set up for your account that logs you out if you stop using Agent Desktop or your computer for a while. Agent Desktop first displays a message to warn you that you are going to be logged out. If Agent Desktop logs you out, just log back in again when you are ready to start using Agent Desktop.

Important

Hot Seating — In your environment, you might either have a single phone number assigned to you at all times, or you might have a different phone number assigned to you each time that you log in (called Hot Seating). If Hot Seating is available in your environment, you must enter the phone number that you are using when you log in.

Important: You may log in only to a single Agent Desktop session at a time. You must log out of one session before logging into a new session.

Important: To log out of Agent Desktop, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

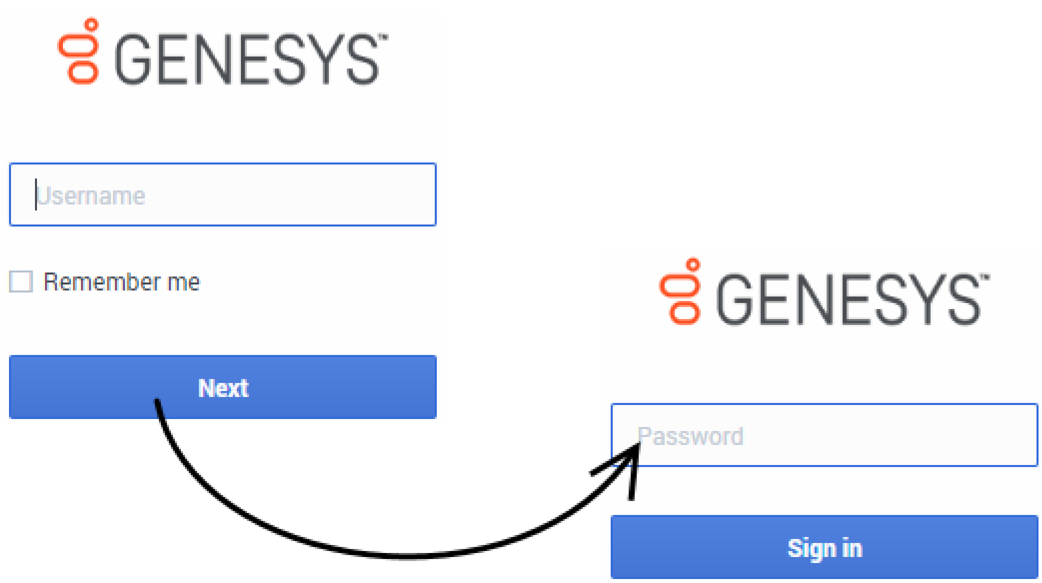
Remote and virtual desktop environments

You might work in an environment that uses Virtual Desktop Infrastructure (VDI, sometimes called VMware) to run Agent Desktop. This means that when you start Agent Desktop, it is displayed on your screen, but it is not actually running on your workstation, it is running on a remote machine.

In VDI environments, your administrator installed the Genesys Softphone on your workstation before you logged in, or, you were instructed to install it by clicking on an installation hyperlink in an email or other document.

When you start your workstation, the Genesys Softphone automatically launches and the Genesys Softphone icon is displayed in your system tray. Until you log in to Agent Desktop, this icon looks like this: . After you launch Agent Desktop and the Genesys Softphone is connected, the Genesys Softphone icon looks like this: .

Log in to Agent Desktop if your company uses OAuth



To start Agent Desktop click its icon in **Genesys Portal**, or open a browser and go to the link for Agent Desktop that your supervisor gave you.

Log in with your username and password.

Tip

- You enter your password on a different login screen.
- Clicking **Change login account** takes you back to the main log in screen.
- Agent Desktop has a security feature that might be set up for your account that logs you out if you stop using Agent Desktop or your computer for a while. Agent Desktop first displays a message to warn you that you are going to be logged out. If Agent Desktop logs you out, just log back in again when you are ready to start using Agent Desktop.

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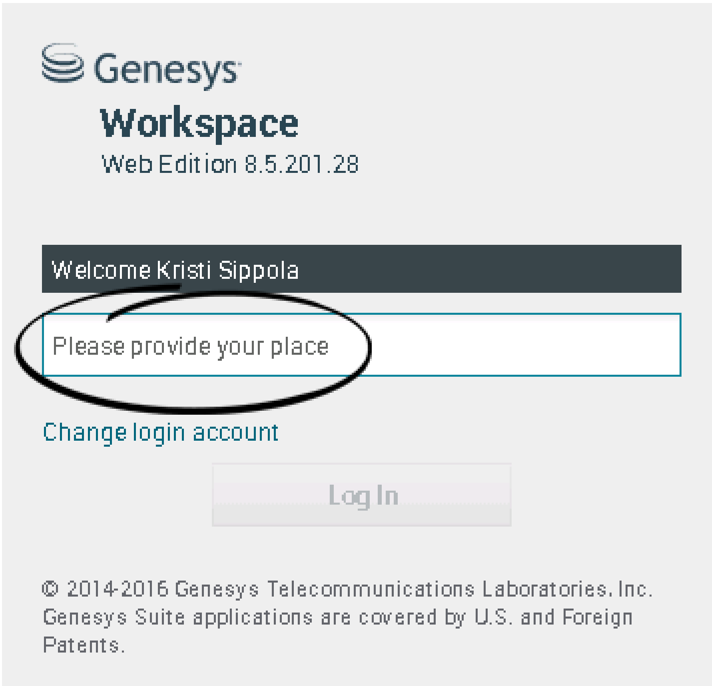
Place



During login, you might see a window that asks you to input your Place.

Your Place is the name or number of the workstation or phone you are using. If you do not know what to enter, ask your supervisor.

If you do not see this window, your account is set up to always log you in on the same Place.

If you move around from Place to Place, you might have to enter a different Place each time that you log in.

Change your status to Ready

Link to video

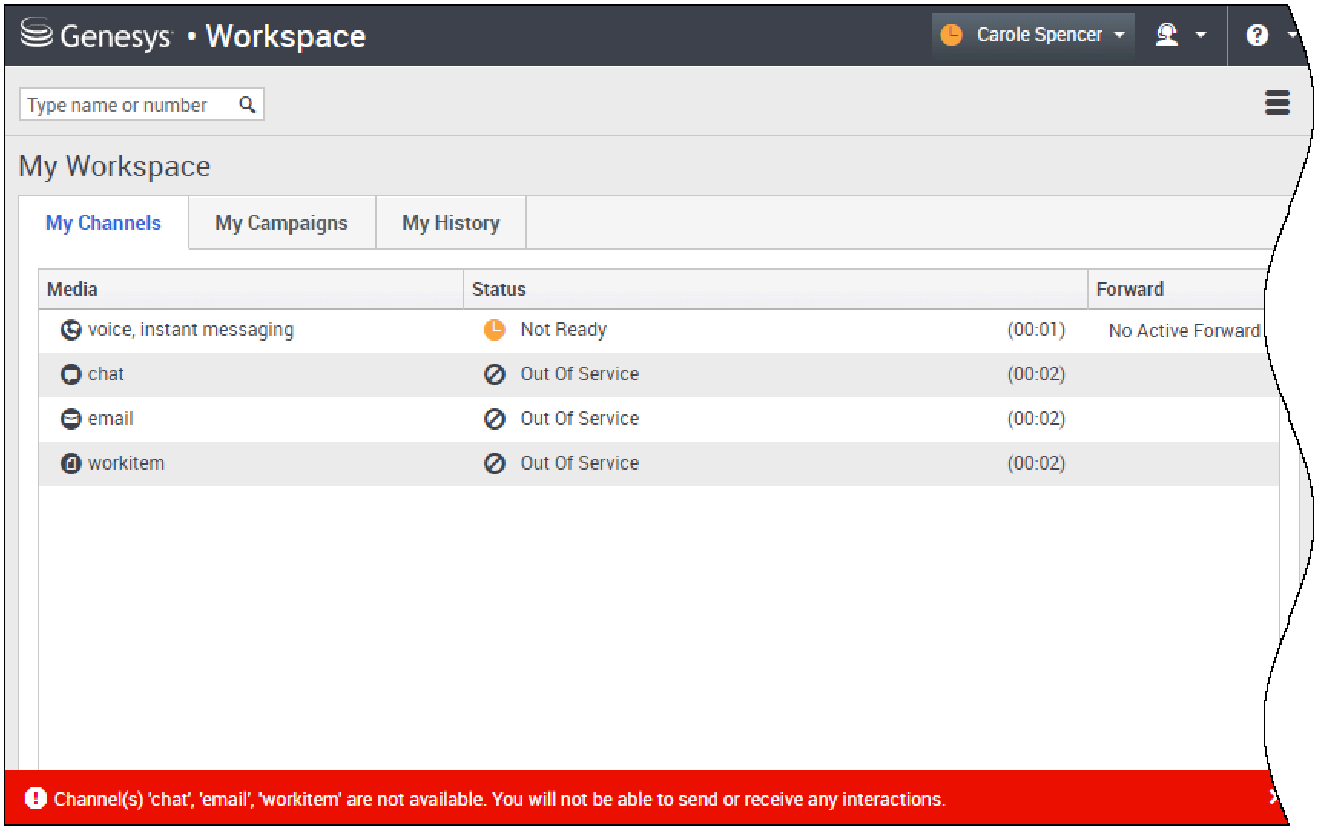
To receive calls, you must be in a **Ready** status (indicated by a green checkmark beside your name).

If you need to change your status, go to **My Channels** and toggle the voice channel to **Ready**.

Tip: You can also change your status for all channels in one easy step. Click your name at the top right-hand corner of the screen and select **Ready**.

Watch the video for a short demonstration of changing your status.

What happens if not all channels are available when I log in?



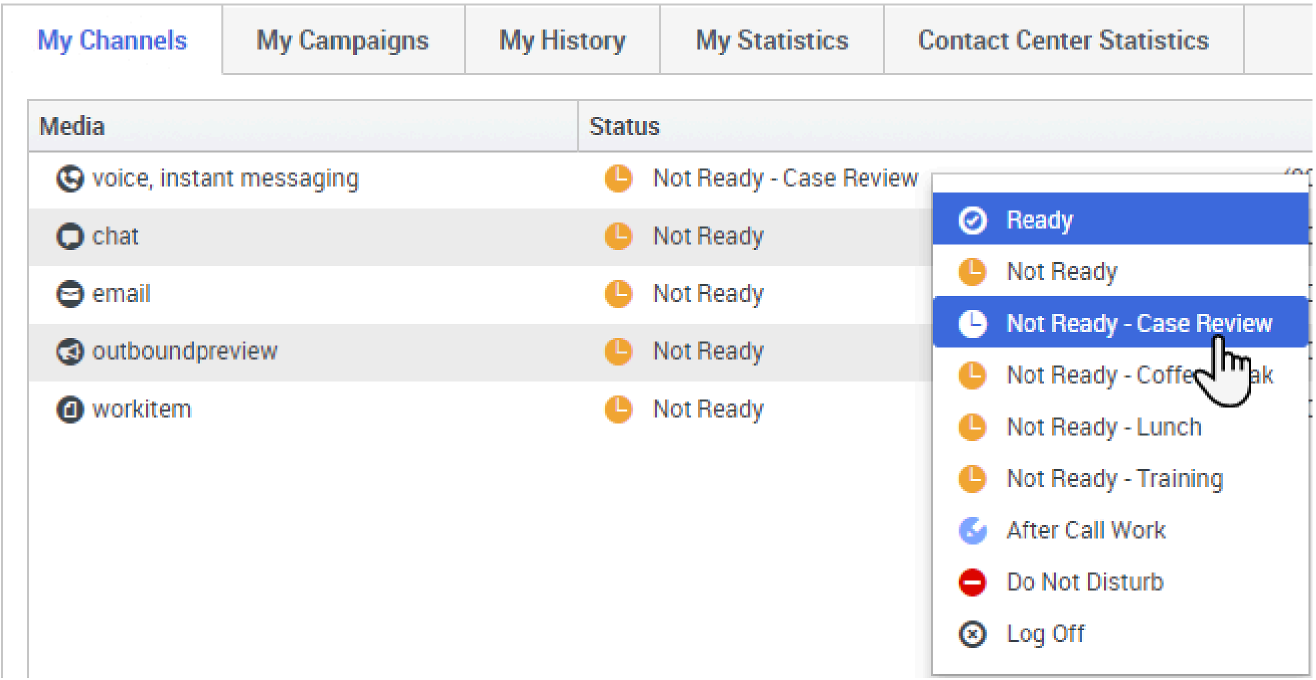
Sometimes when you log in, one or more of the channels that you are assigned might not be available.

You will know that one or more channels are not available because you will see a warning message at the bottom of the Agent Desktop window.

When this happens, you can still log in, but when you look at your My Channels tab, you'll see that one or more channels have the **Out Of Service** status. When a channel is out of service, you cannot log on or off on that channel and you cannot set your status.

When the channel becomes available again, a message will be displayed at the bottom of the Agent Desktop window. You can use the **My Channels** tab to change your status on that channel.

Setting your status to Not Ready with a reason



Sometimes you need to set your status on one or more channels to Not Ready so that you do not receive new interaction on that channel. You can choose to set the status to Not Ready or Not Ready with a reason. Your administrator sets up the Not Ready Reasons that are available to you from the Status drop-down menus.

Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email, the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

Handle an inbound call

Link to video

Make sure your softphone or phone device is connected and ready.

Need help with your softphone? See How do I use my web phone with Agent Desktop?

When a call arrives, you'll get a pop-up in the bottom right-hand corner of your screen. You might also hear a sound to alert you that a call has arrived.

Click **Accept** to connect the call. If you **Reject** the call, or ignore the pop-up, it goes to the next available agent.

To get you started, here are some common call handling features:

 = Hold

 = Resume

 = Transfer

 = Hang up

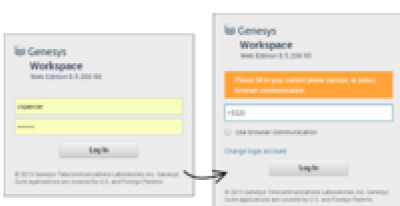
 = Mark Done

After the call is complete, you might enter an **After Call Work** state, during which you can complete any tasks related to the call. For example, you could add a Note or select a Disposition code.

Watch the video for a short demonstration of how to handle a voice call.

Log in, log out, log on, log off, and exit, what's the difference?

You log in and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.



Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the Global Status menu.

What do I do next?

You might want to learn more about:

- Media channels
- Handling calls
- Working with contacts
- Using standard responses
- Managing your workbins (which store your work in progress)

Navigating Agent Desktop (v8)

Important

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Having trouble finding your way around Agent Desktop? If you need help identifying a button or field, hold your mouse pointer over it to reveal a tooltip.

Do you use a screen reader? Do you navigate Agent Desktop using a keyboard? You can find out all about it here!

Main view

Link to video

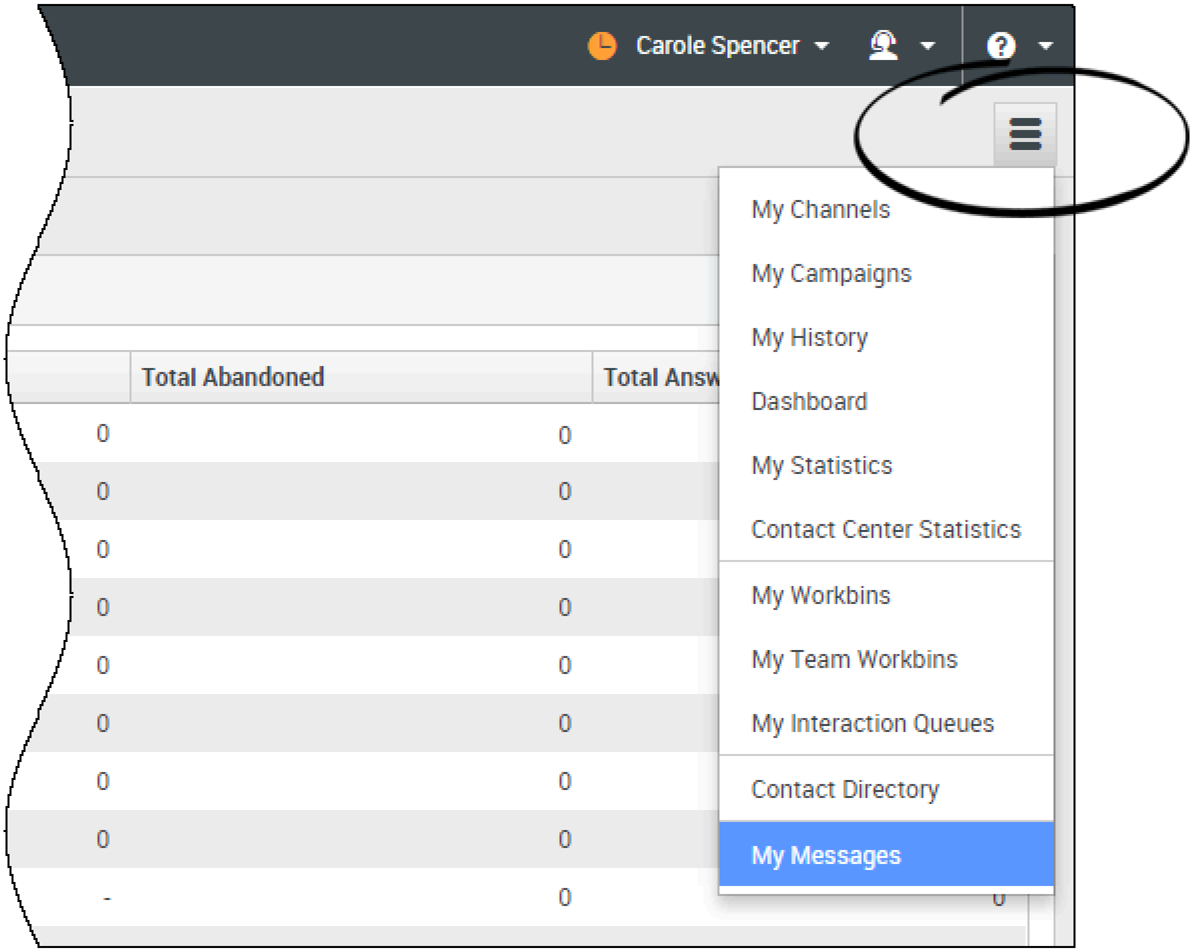
The main view lets you access the most common features that you use every day, such as managing your channels, campaigns, KPIs, workbins contacts/customers, and messages.

Some of the tabs include:

- **My Channels** — Set your status on individual channels, such as voice, chat, and email.
- **My Campaigns** — View and manage your Outbound campaigns.
- **My Statistics** — View your statistics (KPIs) and alerts.
- **Contact Center Statistics** — View the latest statistics and alerts for your contact center.

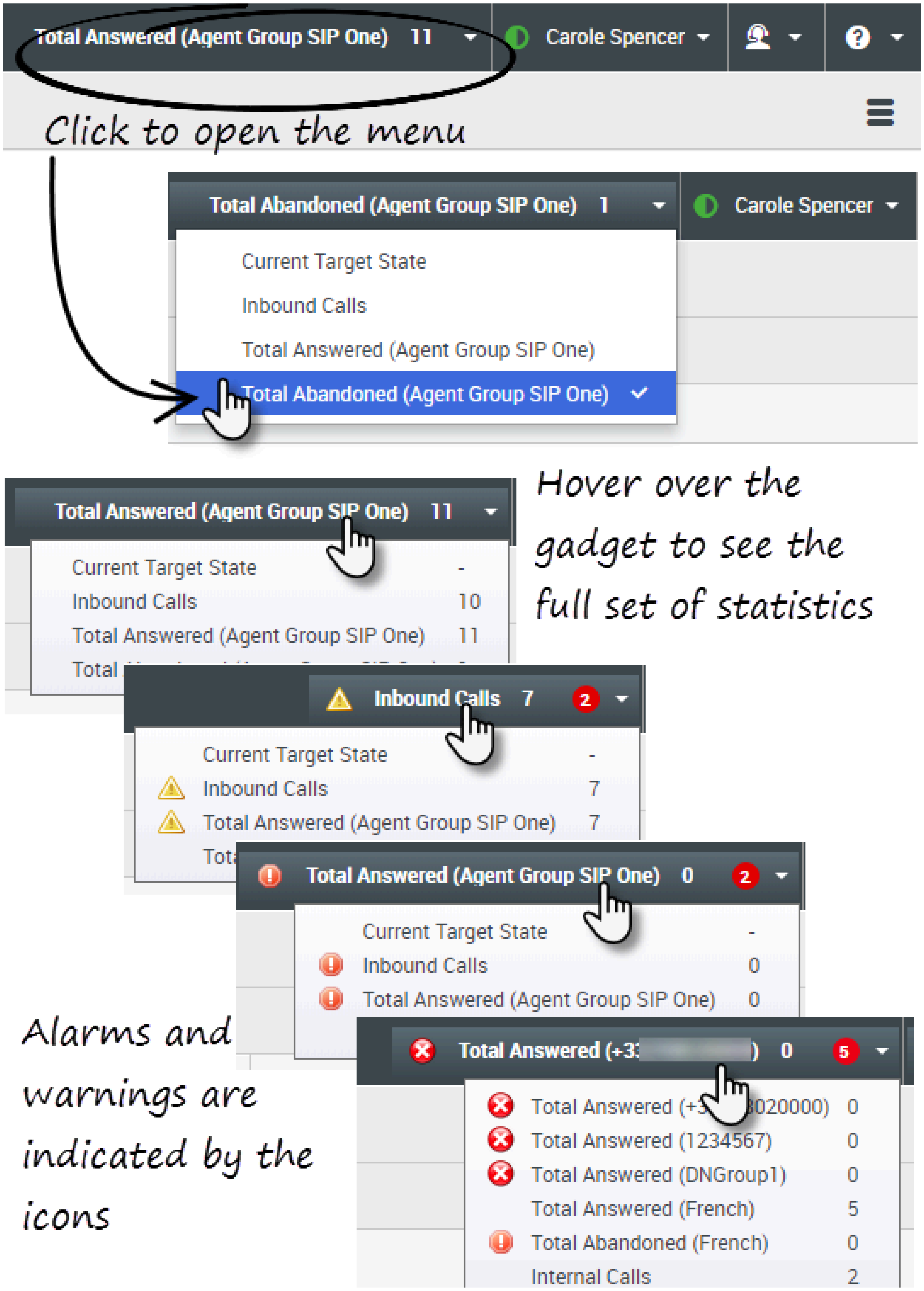
Watch the video for a quick tour of the Agent Desktop main view.

Supporting views



Use ☰ to access all of the views available to you, including returning you to the tab views.

Contact Center Statistics and KPIs



There are three places where you can view and track your performance and the performance of your contact center:

- The Statistics Gadget in the main menu bar
- The Contact Center Statistics tab in My Workspace
- The My Statistics tab in My Workspace

Note: Some or all of these features might not be available in your environment.

Statistics Gadget

The Statistics Gadget helps you to stay up to date on certain key statistics. Your administrator decides which statistics are available for you to view.

The Statistics Gadget displays one statistic at a time, giving you the current status of service level, number of calls waiting, number of calls you have handled, and so on.

Hover your mouse pointer over the Statistics Gadget to see the current values for all of the statistics that have been assigned to the gadget by your administrator.

The red circle with the number tells you how many alarms currently apply to the statistics being evaluated by the gadget.

If more than one statistic has been assigned to the gadget, click it to open a list of currently available statistics and select a different one to display. A check mark is displayed next to the current statistic.

Here are the icons that you might see in the Statistics Gadget, the Contact Center Statistics tab, and the My Statistics tab:

- A worst icon is displayed if the evaluation of the performance is the worst of your group ().
- An error icon is displayed if the evaluation of the performance is below the expected error level for the KPI ().
- A warning icon is displayed if the evaluation of your performance for the KPI goes beyond the expected warning level for the KPI ().

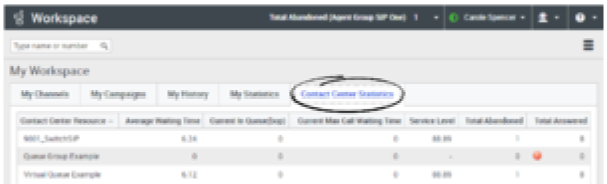
To see all of the statistics available for your contact center or for yourself (all your KPIs), click the appropriate tab in My Workspace. You can also choose these tabs from the Available Views () menu.

Contact Center Statistics tab

The items displayed on this tab are statistics for Routing Points, Queues, and other contact center fascilities.

The Contact Center Statistics tab displays statistics that summarize the state of various conditions, such as waiting time, calls in queue, average maximum waiting time, service level, and answered and abandoned calls, that are monitored by your contact center.

Click the **Contact Center Resource** column head to change the sort order of the resources.

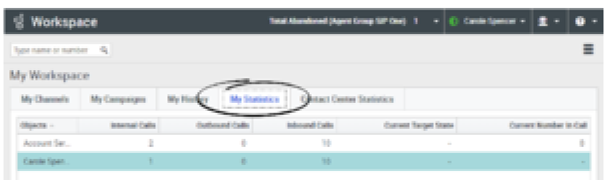


My Statistics tab

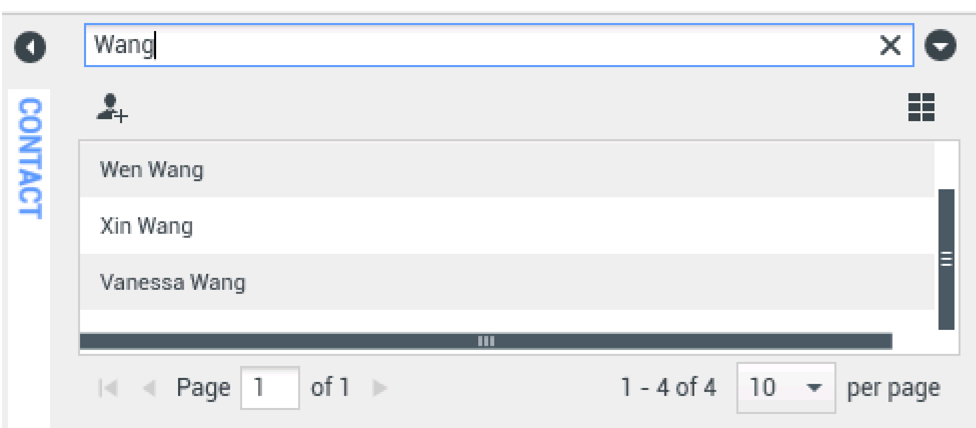
This tab displays the list of your Key Performance Indicators (KPIs).

The KPIs that are displayed are set up by your system administrator. The statistics might be for your agent group rather than for you personally.

Click the **Objects** column heads to change the sort order of the KPIs.



Quick Search



In the Quick Search field, you can enter the name or other information, such as a phone number or email address, of a contact, then click the magnifying-glass icon to begin the search of the contact database.

Chronology slider

The chronology slider lets you search the contact history for interactions that took place within a certain time period. The slider has four positions:

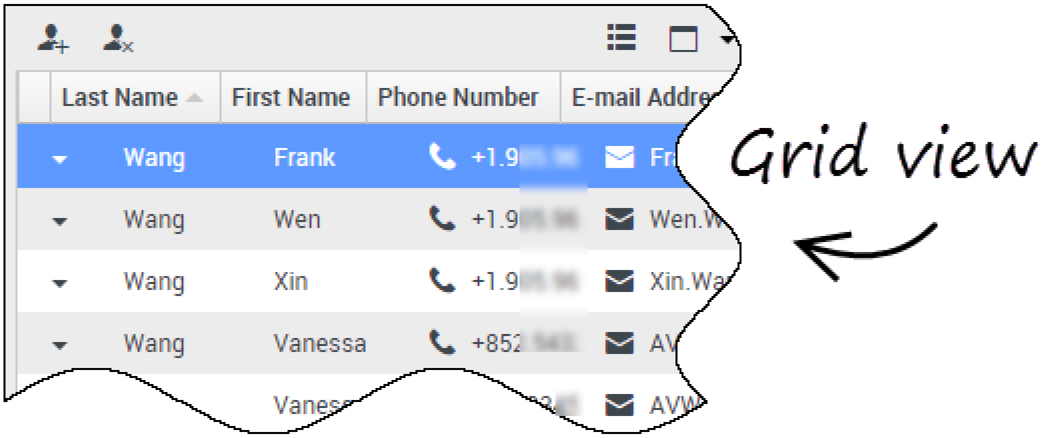
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **Last Month**—Search the database from the most recent interaction back to one month ago
- **Last Week**—Search the database from the most recent interaction back to one week ago
- **Last Day**—Search the database from the most recent interaction back to one day ago

Page controls

Page through the list of search results by doing any of the following:

- **Go to the Next Page** (▶)
- **Go to the Previous Page** (◀)
- **Go to First Page** (|◀)
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

List and Grid views



The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

Grid mode results are returned in tabular form and sorted according to the default search field, such as Last Name. The Grid view can be used to help to refine your search by sorting the results.

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

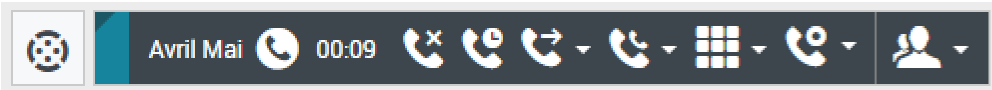
Show/Hide panel details

The **Show Details Panel on Bottom/Hide Details Panel** button ( ) enables you to specify how the Details panel is displayed. The details panel can be shown or hidden, and, when shown, can be displayed below or to the right of the window.

Click the **Show Details Panel on Bottom/Hide Details Panel** button to choose one of the following views:

- —Displays the Details panel below the workspace area.
- —Hides the Details panel.

Interaction Bar



The Interaction Bar is displayed in the main view whenever you have one or more active interactions. If you have multiple active interactions, only the tools for the current active interaction are displayed. The toolbar for other active interactions collapse until you click them to make them current.

Each interaction is represented by a control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call.

- Click the control bar for an interaction to give it the focus. All other open interactions are collapsed to the Interaction Bar.
- Click the small colored bar on the left of the interaction control to toggle between pinned mode and floating mode. In floating mode, other open views appear dimmed behind the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention.

Tip: To allow for the maximum space in the Interaction Bar, when you are handling an interaction, the Team Communicator is reduced to a button.

Team Communicator

Link to video

Team Communicator lets you find someone in your company's internal directory (such as a team member, a routing point, or an agent group), and sometimes someone outside your company, such as an external resource person or even a customer contact. It's useful for getting help or consulting with someone while working with an interaction.

To start a call or email interaction, just click in the Team Communicator search field and start typing a name, number, or email address.

You can also filter the search results:

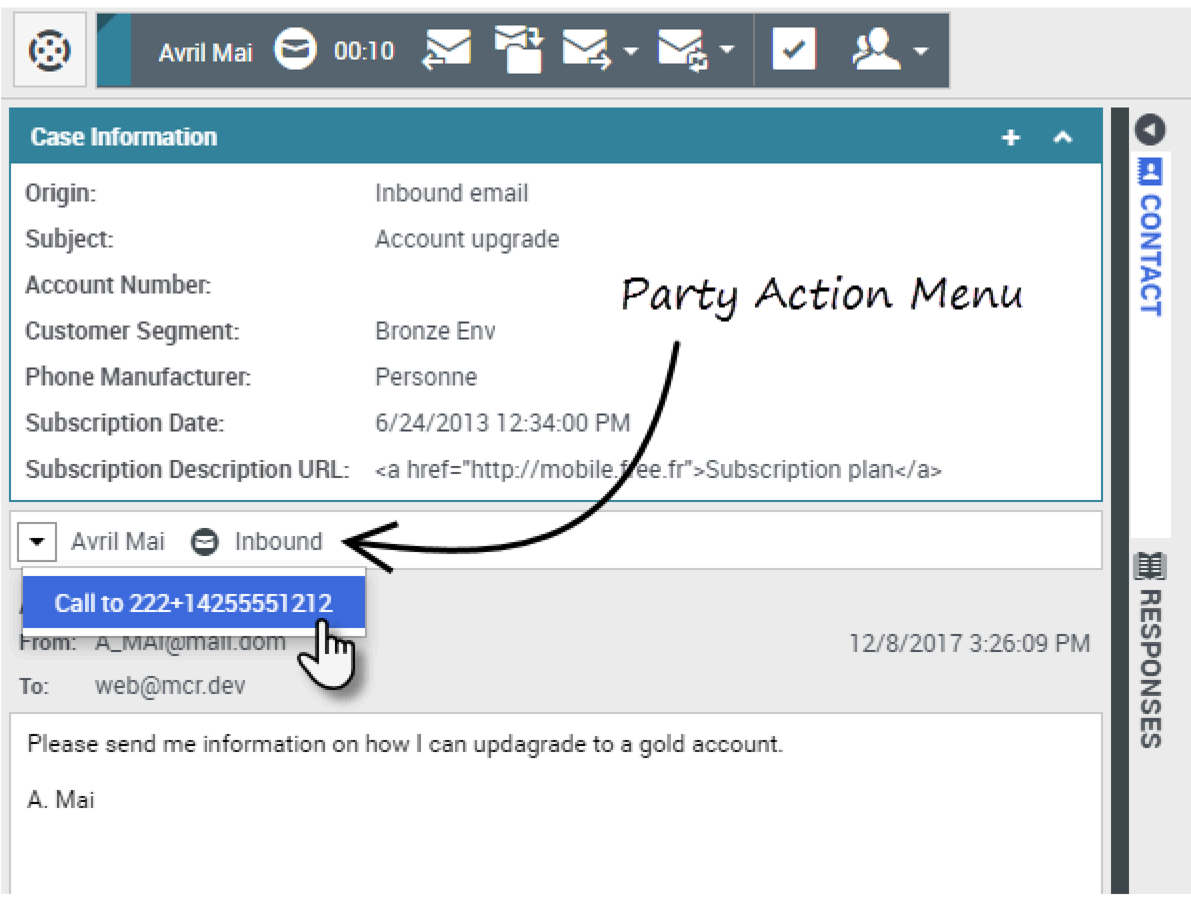
-  to search all contacts
-  to search your favorites
-  to search recent contacts
-  to group (or ungroup) your results by category or type

If you miss a call, the clock button changes to orange, like this: . Click it to display any missed calls. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

Tip: When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button changes back to white if you have viewed your recent and missed calls, or if you have called back all of your missed calls.

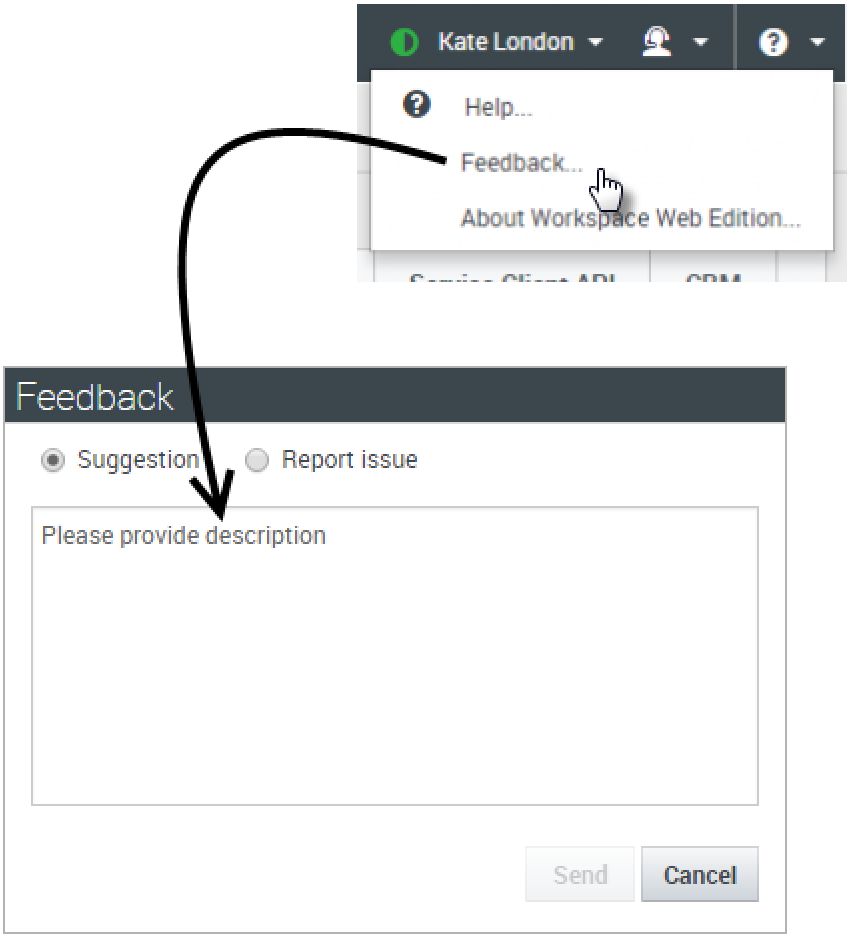
Watch the video for a short demonstration of how to use Team Communicator.

Party Action menu



The **Party Action** menu is a part of every interaction. You can use it during an interaction to launch a secondary interaction. For example, while you are handling an email interaction from a contact, you can use the **Party Action** menu to call the contact if their phone number address is stored in your corporate database.

How to provide feedback when something goes wrong



Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls, emails, and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop.

These and other issues are problems that you should report to your supervisor. Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason Agent Desktop becomes disconnected from your network and you have to close your browser and launch a new one to log in again, Agent Desktop automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

Once a feedback report is logged to you as a supervisor, contact Genesys Customer Care as soon as possible to provide the reporting user's name and DN at the time of the incident, as well as the approximate time the incident occurred. The Customer Care agent should be able to retrieve the relevant log to determine what the issue might have been.

Keyboard navigation and accessibility

Agent Desktop lets you navigate the interface entirely by keyboard. This means that you don't have to use a mouse to activate different features or select buttons.

It also means that you can use a screen-reader application to perform all the functions you need.

Whenever an event happens in Agent Desktop, like you get a new interations or an error message is displayed, Agent Desktop makes a sound to alert you.

All the different ways that you can use the keyboard and a screen-reader to move around are described in this section.

Agent Desktop lets you use keyboard shortcuts combinations for some common actions. Ask your administrator for a list of the shortcuts that are set up for Agent Desktop.

Shortcut key combinations

A shortcut is a combination of keys that you press to make something happen in an Agent Desktop window.

OS shortcuts

The computer operating system also has shortcut keys to let you copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

Agent Desktop shortcut keys

Agent Desktop supports three shortcut key combinations that you can use to make you more productive. These are the default shortcuts (your administrator might have set up different shortcuts for you):

- **Alt+N** — Jump to the next interaction if you have multiple interactions open
- **Alt+B** — Jump to the previous interaction if you have multiple interactions open
- **Alt+L** — Jump to the last error message that you received

Keyboard navigation

Agent Desktop supports keyboard navigation for all features, functions, options, and menus.

If you do not use a mouse or if you are using a device for accessibility that needs keyboard navigation, you can still use all the Agent Desktop features. Many *expert users* prefer to use keyboard navigation to maximize productivity.

Colors and appearance change as you select different items on the Agent Desktop. For example, buttons change color and menus open with the current selection highlighted by color.

Basic navigation using the TAB key

The simplest way to navigate by keyboard is to use the **TAB** and **SHIFT+TAB** keys.

- **Tab**—Moves your focus to the next menu, field, button, view, and so on.
- **Shift + Tab**—Moves your focus to the previous menu, field, button, view, and so on.

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

Navigation Shortcuts

This table shows you the keyboard shortcuts that let you control Agent Desktop without using a mouse.

Agent Desktop keyboard shortcuts

Shortcut	Description
Left Arrow	• Move left in a menu bar or out of a submenu. • Move to the next tab on the left. • Move left in the history slider.
Right Arrow	• Move right in a menu bar or out of a submenu. • Move to the next tab on the right. • Move right in the history slider.

Shortcut	Description
Up Arrow	Move up in lists and menus.
Down Arrow	Move down in lists and menus.
Alt+Down Arrow	Open a selected drop-down list.
Enter	For a modifiable list, apply the edit mode, or validate the modification. For a button, execute the associated action. For a menu item, execute the associated action.
Space	For some controls, select or clear the check box that has the focus.
Escape	For a modifiable list, cancel the edit mode.

Channels (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Channels are the different methods, such as email and chat, that you use to communicate with customers and team members in your contact center.

What does each channel do?

Each channel lets you communicate with your contacts in different ways. You can make and receive phone calls (known as the Voice channel). You can also receive and reply to emails, interactive live chats, Facebook messages, and Tweets on Twitter.

Why can't I see all the channels?

Depending on your assignment, you might have all, some, or just one of the channels available to you.

What's the difference between a consultation and a conference?

Both activities involve getting help from an agent or supervisor. Consultations let you communicate with a team member privately while handling an interaction. Conferences let someone else from your contact center join the chat or phone call with your contact.

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

What can I do in the My Channels tab?

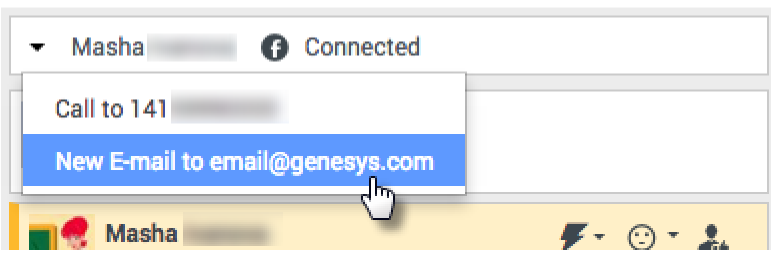
Use the My Channels tab to:

- Change your status on a channel
- Log off from a channel
- Turn on/off your Do Not Disturb status (applies to all channels)
- Forward calls that are directed to your extension to another extension

Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

Can I use more than one channel at a time?



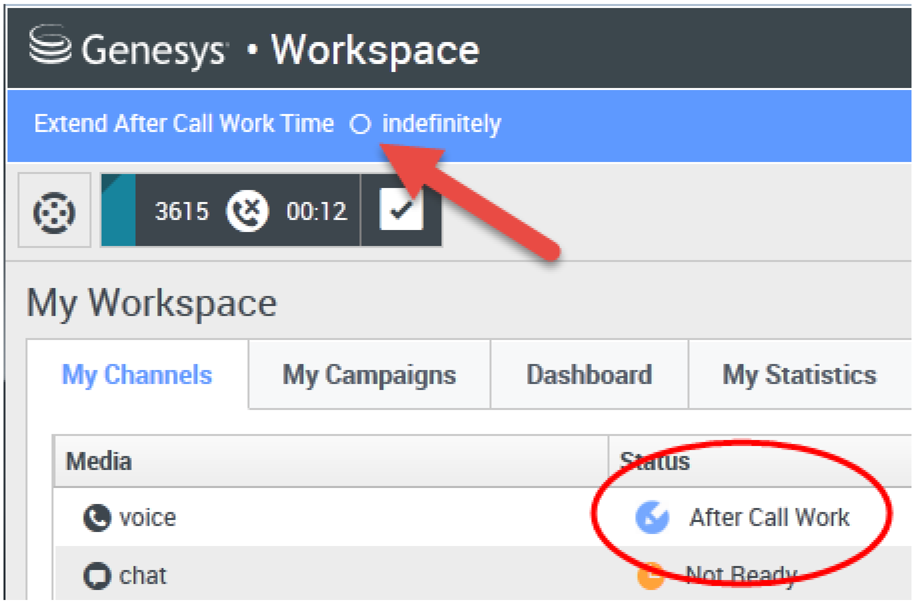
Your environment might be set up to let you use another channel while you are active in a different one. For example, you might want to call a contact while you are handling their email or chat request.

To do this, use the **Party Action** menu in the Interaction Status area to find a list of all phone numbers and email addresses your company has for the contact, and select the one you want to use. If the connection is made, the status area and interaction control buttons are updated to include the new channel.

You might also be set up to handle multiple interactions over different channels simultaneously, such as three emails, two chats and a call with different customers.

If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.

What happens when I mark an interaction as Done?



The answer depends on your account setup.

You might have to mark an interaction as **Done** before you can close the interaction view.

When you click **Mark Done**, your status might automatically change from **After Call Work** to **Ready**, **Not Ready**, or some other value, or you might have to manually set your status to **Ready**, or some other value, after you complete your after call work.

You might be allotted a certain amount of time after each call to perform After Call Work (ACW). If so, your status for the voice channel will be **After call work** until the time interval has passed, then it might change to **Ready** or **Not Ready**. You might also be able to extend your after call work time indefinitely, if a call requires more than the usual amount of after call work.

Calls (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Agent Desktop provides you with controls and features that let you handle voice interactions with contacts or team members.

Related Topics

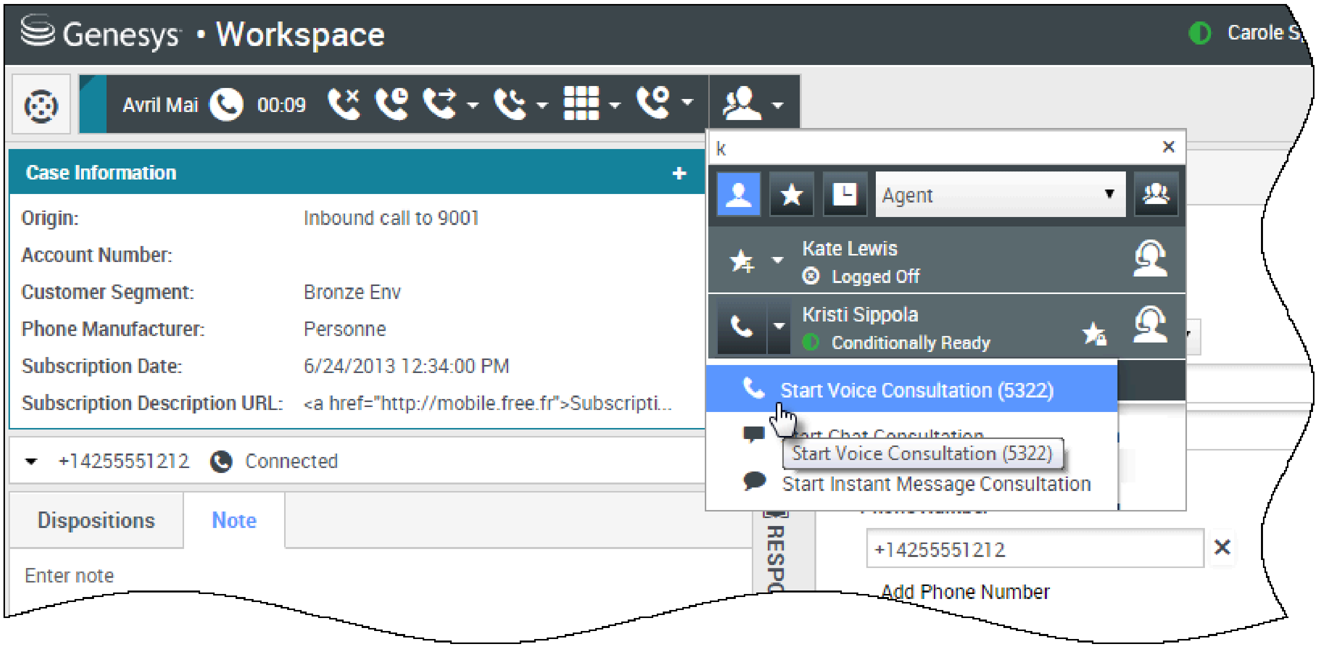
How do I handle an incoming call?

Link to video

- Handle it myself
- Handle it myself with help
- Transfer it
    - Instantly 
    - After a consultation
- End the call 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

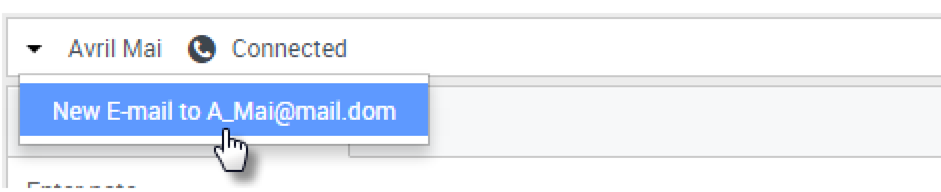
Where can I get help to handle a call?



- Look for standard responses
- Search contact and interaction history
- Start a consultation 
- Start a conference 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

What other actions can I take during a call?



- Send an email or make another call
- Update contact information
- Record the call

- Hold  and resume 
- Dial digits  without using your phone. For instance, you can use this dialer when you are navigating a phone system.

How do I control the volume of my headset and mute myself?

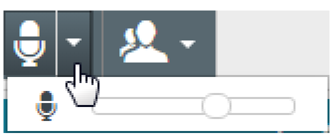
Link to video

Your administrator can set up the controls for your microphone and speakers on your headset to let you mute and unmute yourself and/or your contact, and let you control the volume of your microphone and speakers.

Depending on how things are set up, you might see different configurations of buttons:

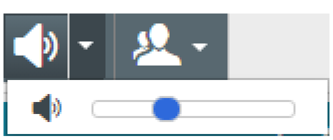
- Mute/unmute your microphone

- Adjust the volume of your microphone

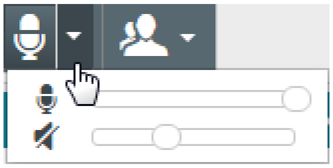


- Mute/unmute your speaker

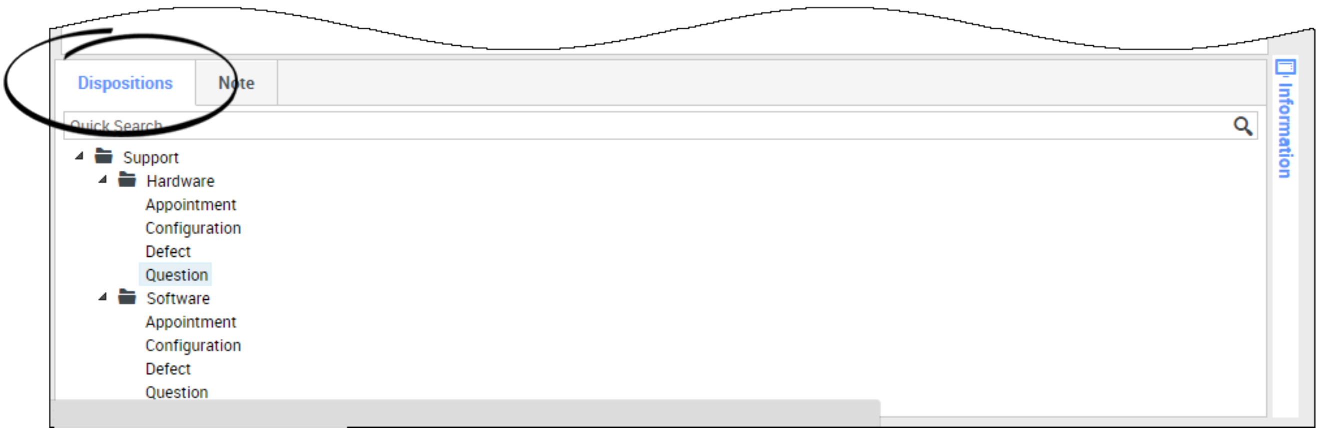
- Adjust the volume of your speaker



- Adjust the volume of both your microphone and your speaker

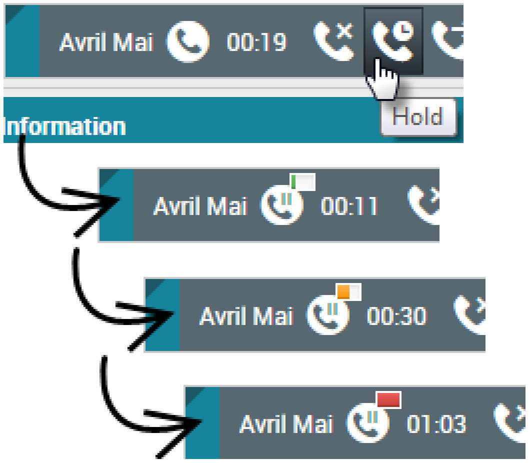


What do I do at the end of a call?



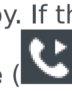
- End call 
- Take notes
- Select a disposition code if required
- Mark Done 
- Change status as needed

What happens when I put someone on hold?

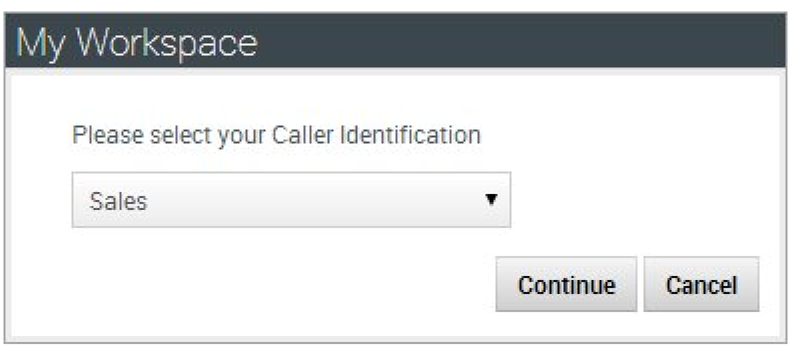


You can see how long you have placed a caller on hold, if enabled.

After you click **Hold** (), a timer and progress bar begin to count the seconds that the call is on hold.

The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call has been on hold too long and you should click **Resume** () to update the contact and let them know that they are still on the call.

How do I manually select a Caller Identification?



When you make a call, you might have to choose a Caller Identification to be displayed on the phone of the contact. This feature might also be enabled for calls that you are transferring or conferencing.

The person you call sees the Caller ID you select. The previous Caller ID that you selected is selected by default. To hide your identity, you can select `Anonymous` if available. Ask your supervisor about when to use this feature.

How do I record a call?

The Call Recording functionality (for VoIP/SIP enabled agents only) enables you to record the current voice interaction with a contact or an internal target. Agent Desktop supports two different types of call recording: emergency recording and controlled call recording. Your system administrator configures the type of call recording that is supported in your environment.

If your account is set up for emergency recording, you can start and stop recording by using a single toggle button.

If your account is set up for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

In addition, you might also be configured for automatic or system-guided recording. If this is the case, you will receive a notification that recording is in progress.

Call recording enables you to perform the following functions:

- **Record the call** — Select Record the Call () to record a call.
- **Stop recording the call** — Select Stop Recording the Call () to stop recording a call that you are currently recording.
- **Pause recording the call** — Select Pause Recording the Call () to pause recording a call that you are currently recording.
- **Resume recording the call** — Select Resume Recording the Call () to stop recording a call that you are currently recording.

When you are recording a call, the call icon in the connected-parties area changes to red.

When you pause a call recording, the red call icon changes back to gray.

A call-recording icon () is displayed in the title bar of the Main View when a call recording is active.

How do I forward my calls?

To forward calls to a different extension or phone number, on the selected media channel, in the Forward column, click No Active Forward and **Forward**.

This action opens the Forward dialog box. Enter the number to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an Active Forward set and you want to disable it, on the voice channel, in the Forward column, select **Forwarded to <number>**, and select **Cancel Forward to <number>**.

In the Cancel Forward dialog box, select **Yes** to cancel the forward; this removes the active forward and changes the Forward status to **No Active Forward**. To keep the forward active, select **No**.

> **Important**
> When an Active Forward is set, no call is received by the application.

How do I call someone back?

If you are handling a call and the call drops you can call the contact back either by opening Team Communicator, filtering for Recent Calls (), and selecting their name, or by opening the **Party Action** menu and selecting the contact's phone number from the pop-up menu.

Email (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The email interaction window enables you to view all of the information necessary to handle inbound and outbound email interactions with a contact.

Related Topics

How do I handle an inbound email?

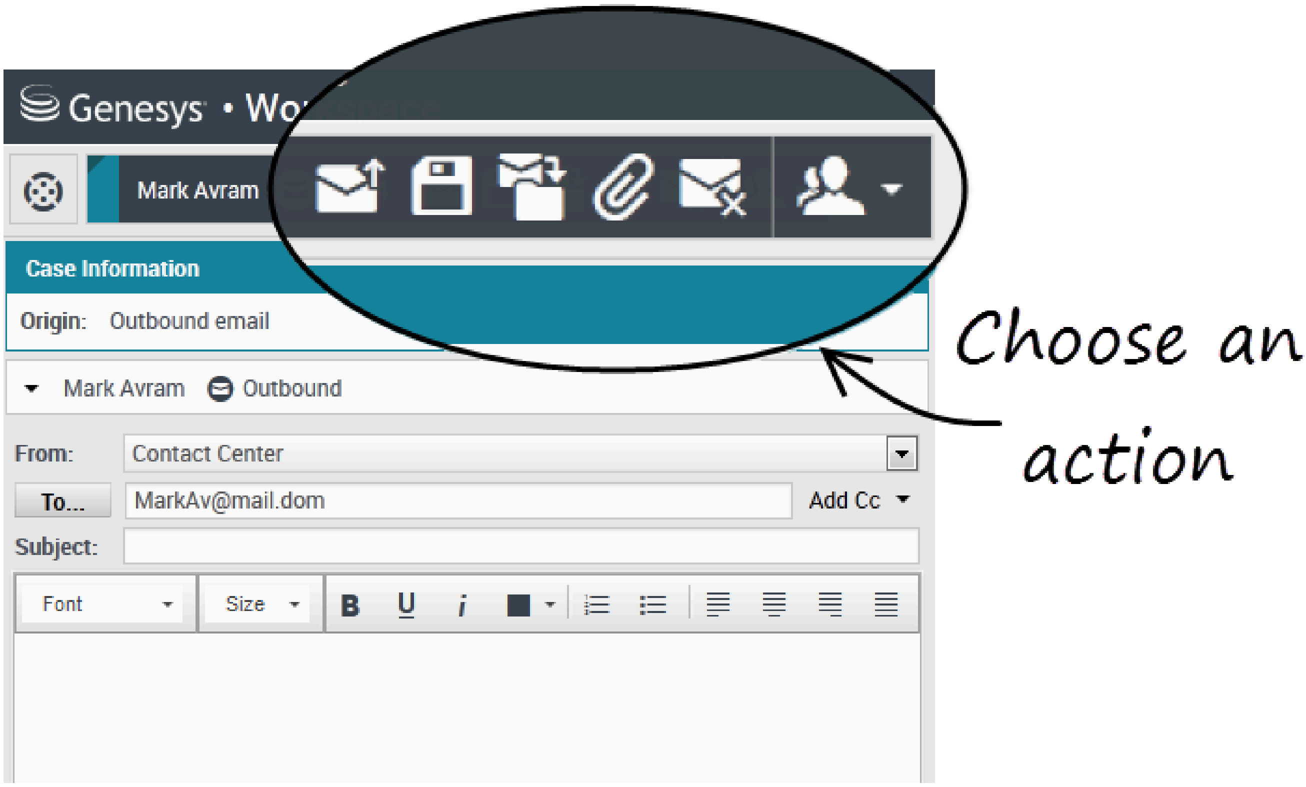
Link to video

Typical actions you can take with an email are:

-  to reply to the email, using your own message or a standard response.
-  to reply all.
-  to transfer the email to another agent.
-  to forward the email to an external resource.
-  to save it in your workbin.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when an email arrives at a workstation.

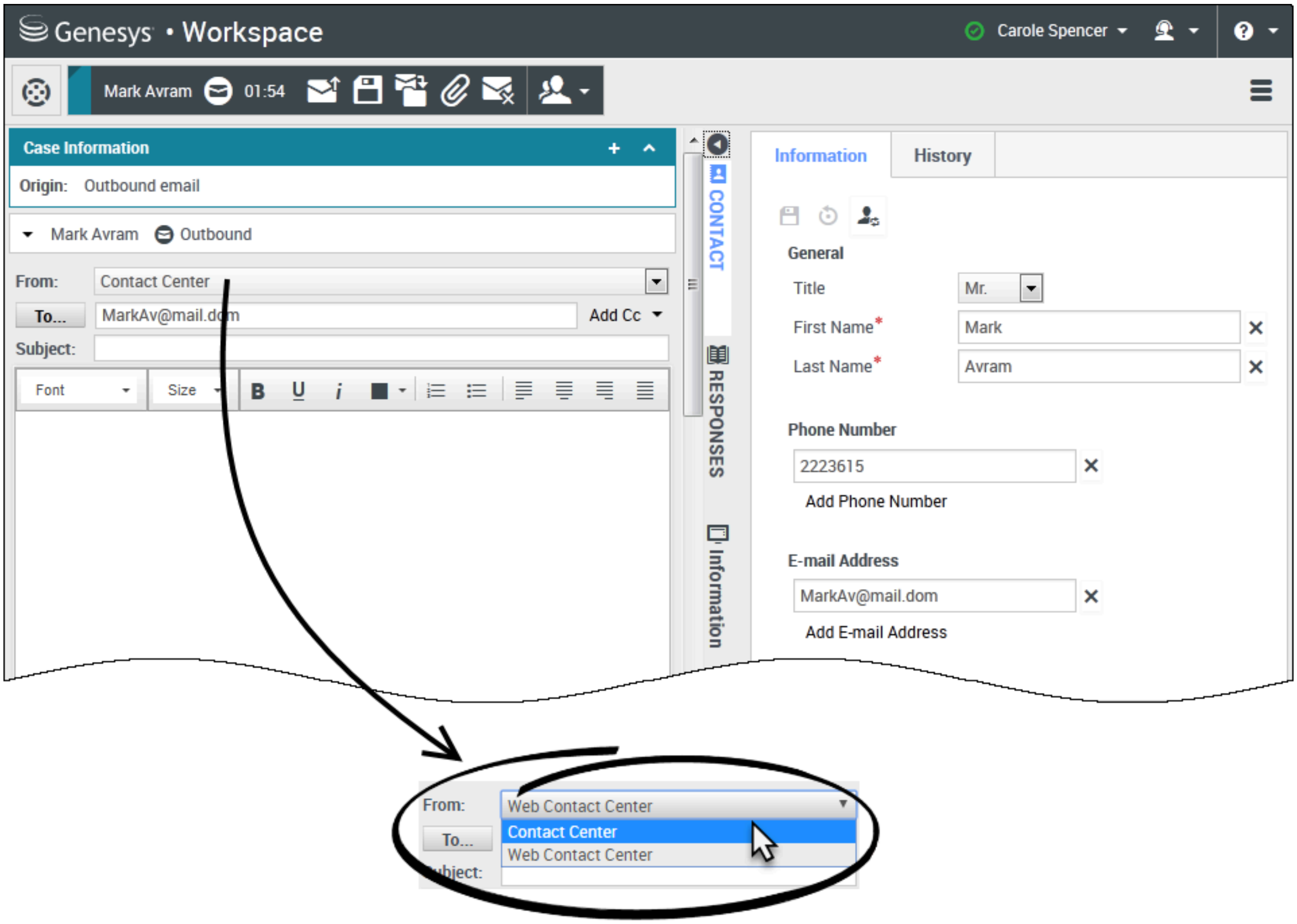
How can I get help with an email?



- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
-  to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
-  to forward the email to an external third-party resource for additional support or help.

If you are sending the email to someone else, you can add your own notes or instructions for that person to review.

How do I compose and send an email?



There are three main ways to compose and send an email in Agent Desktop:

- Reply to an active interaction.
- Find a contact (using your internal team or contacts directory) and select the email option from their contact details.
- During a call, click the party action menu and select **New E-Mail to...**.

While the outbound email window is open, you can compose a message, add any required notes, dispositions, attachments, and recipients, and then send the email.

Use the **From** drop-down to choose a different 'from' email address. Your administrator sets the 'from' default address.

If you are not yet ready to send it, you can save it as a draft in your workbin, or delete it.

Forwarding an email as an attachment to an external resource

Link to video

To send a copy of an email interaction as an attachment to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). A forwarded inbound email is copied as an attachment to a new email interaction from you. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. This feature is available only for current email interactions.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message in the **Enter Forward Instructions** area, above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

Forwarding an email inline to an external resource

Link to video

To send a commented copy of an email interaction to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). This is called inline forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name or the header of the email that you are forwarding and below that, the contents of the original email quoted. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. Usually this feature is available only for current email interactions; however, some contact centers might give you the ability to forward email interactions from the Interaction History that have already been closed.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

Forwarding from History

You can inline forward from the Interaction History. In the following windows, select an interaction and click :

- **Interaction History**
- **Contact History**
- **My History**

Forwarding either inline or as an attachment

Link to video

Some contact centers are set up to enable you to choose whether you want to forward an inbound email in-line or as an attachment. If this feature is enabled for you, the Forward button has a drop down menu that lets you choose how you want to forward an email.

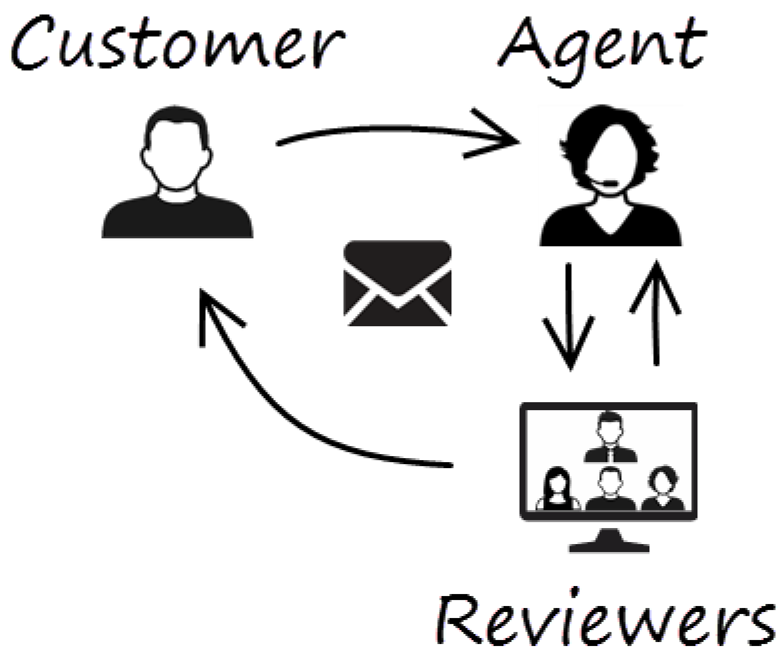
Click **Forward** to open the menu.

Choose one of the following options:

- Forward
- Forward as an Attachment

Follow the steps in the sections above, depending on which way you are forwarding your email.

How does email quality assurance work?



Agent Desktop lets you and your team lead or supervisor work together to perform a Quality Assurance (QA) review of outbound emails. If your contact center is set up for email QA, any emails that you send are first sent to a reviewer for approval.

Here's an example of how a typical email QA review cycle might work:

- A customer sends an email to an agent.
- The agent sends a reply, which is directed to a reviewer.
- The reviewer either approves the email (sends it to the customer) or rejects it (holds it back for changes). The reviewer might make the updates themselves, or send it back to the agent with notes or instructions. The Case Information for the interaction might also show a **Rejected** status.
- After the changes are made, the review process repeats.

(Ask your administrator about the QA review process in your contact center as it might differ from the one described here.)

Chat (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The chat channel lets you handle customer chats.

This page describes the typical options for handling a chat interaction. During a chat session, you and your contact send messages back and forth in real-time. When your contact is typing, you will see a notice that they are writing a response, but you won't see what they have written until they send it. The Interaction View keeps track of the conversation and allows you to review what has been said.

Related Topics

How do I handle a chat interaction?

Link to video

When you accept a chat request, the name of the contact is displayed at the top of the screen and the timer for the pending response indicator starts. The color of the indicator begins as green, then changes to yellow if you have not responded within the specified time limit. If you still do not respond, the indicator changes to red and begins to flash.

Some of the things you can do while handling a chat include:

- Transfer () the chat to someone else in your company.
- Start a chat conference () with yourself, the customer, and someone else in your company.
- Start a Voice (internal targets and contacts) or Chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the Party Action menu by clicking an email address or phone number.) If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.

- Add a disposition code or note.
- End the chat () and mark it as done ().

If you place your mouse pointer over the interaction in the Interaction Bar, you can see the elapsed time of the interaction and the last lines of the chat transcript. Connection-status information is displayed next to the Party Action menu.

Note: If you have a pending response and the Chat Interaction window is not the active window, it will start flashing in the Windows taskbar, regardless of the pending-response indicator status (green, yellow, or red).

Watch the video to see what happens when a chat request arrives at a workstation.

Facebook (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Facebook channel enables you to handle interactions with contacts and team members on the popular social networking service.

Businesses use Facebook to reach their target customers, choosing their audience by location, age and interests. Businesses can also promote their Facebook page or website, use Facebook's "Like" button to increase their advertising influence, and build a community around their business.

Important

- Some Workspace Agent Desktop features are not available in all environments. You might not have this channel available in your environment. Check with your system administrator if you are assigned this channel but do not see it in the **My Channels** tab.
- You cannot attach files or pictures to your comments.

How do I handle a Facebook interaction?

When a new inbound Facebook interaction is sent to your workstation, a preview of the interaction is displayed at the bottom right-hand corner of your desktop.

If you accept the interaction, the inbound Facebook interaction view is displayed with the original-routed post on the left margin under the Facebook interaction toolbar. Subsequent comments are indented underneath the original post.

To view your Facebook contact information, select **Show Info** to open a user profile tab or select the username to open the Facebook page with user profile information.

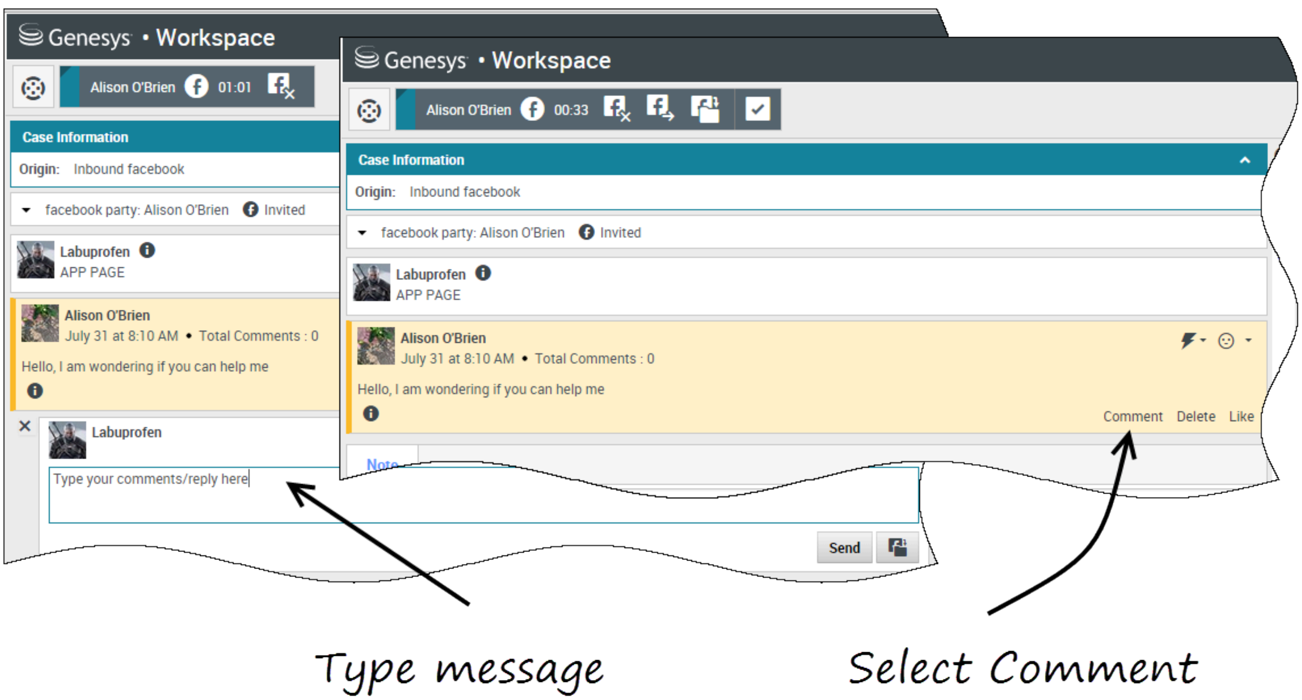
To reply to an original post, click **Comment** on the right of the post. Your comment is attached with the post and sent to your Facebook contact.

Some of the things you can do while handling a Facebook interaction include:

- Transfer the interaction to someone else in your company.

- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

What actions can you take while viewing comments

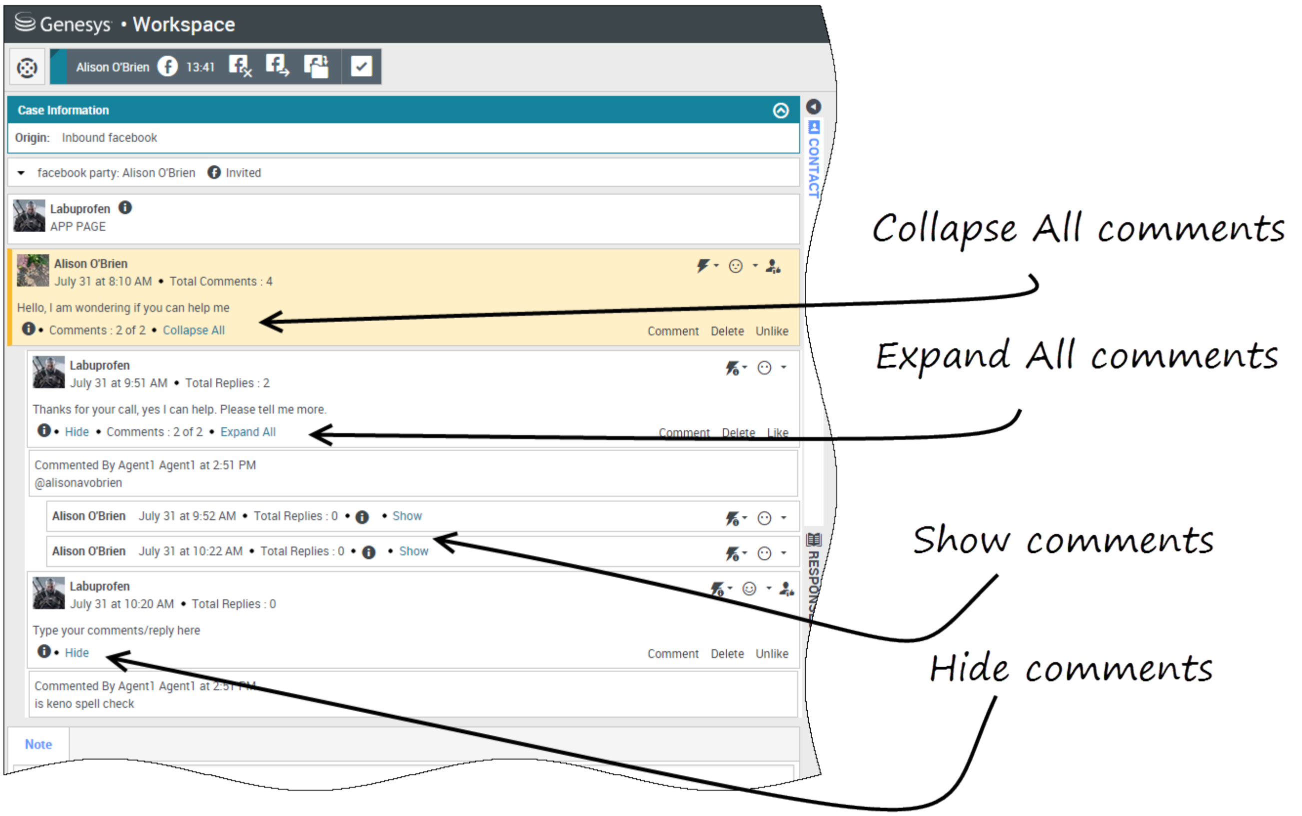


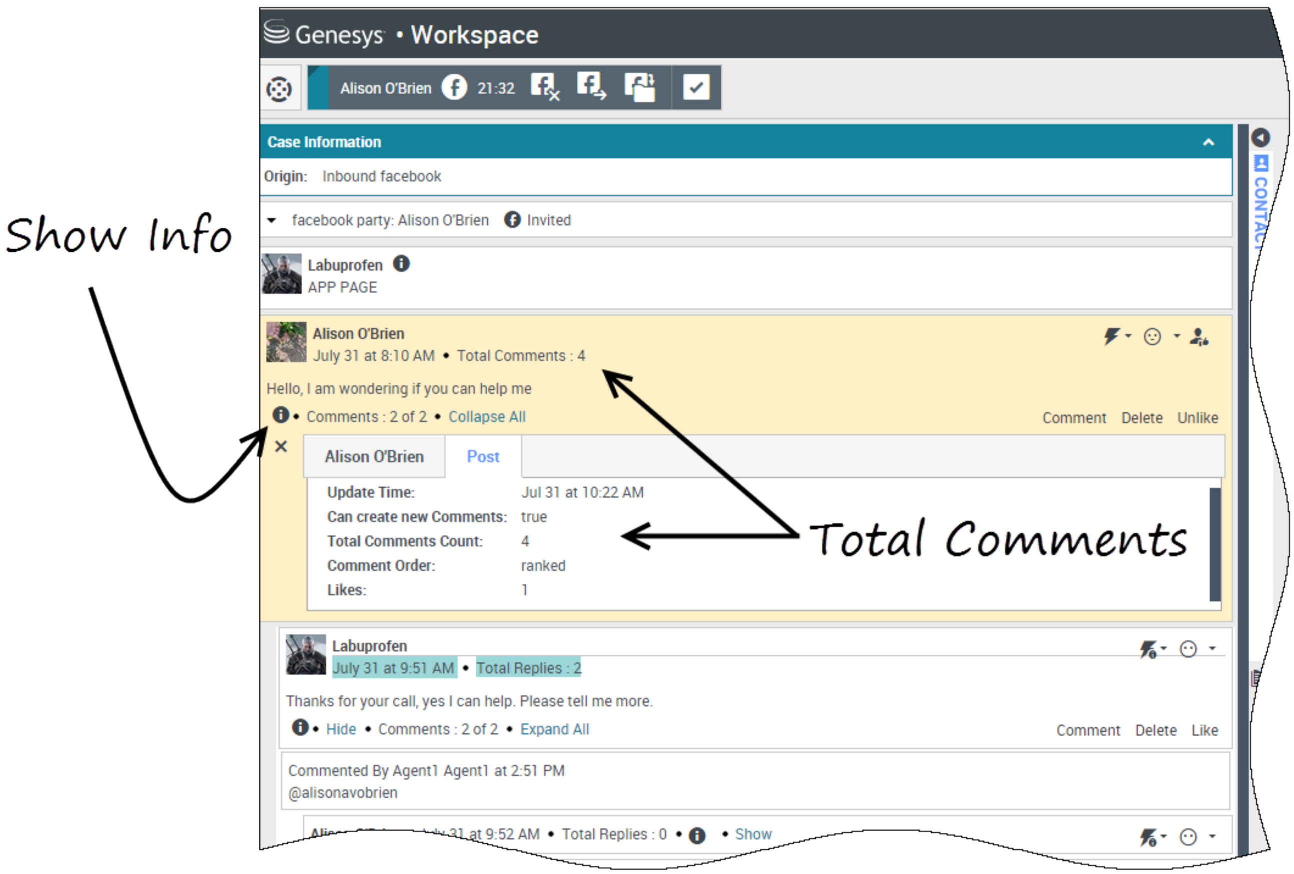
You can reply to your Facebook contact. Select "Comment" and type your message in the text box.

You can also select **View**, **Hide**, **Expand All**, or **Collapse All** to manage the appearance of the comments.

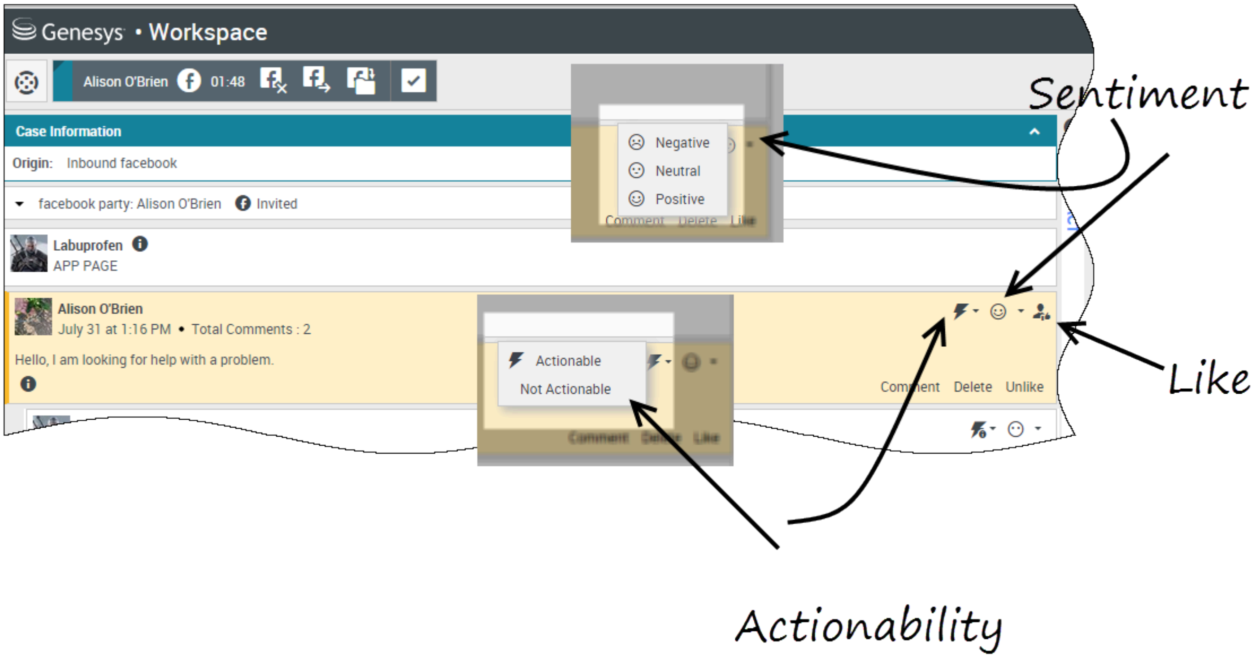
Select the **Show Info** button to open the user profile then select the **Post** tab to view the total comments count. Total comments also appears above the original post. Your administrator sets up the number of comments to display per page. If the number of comments exceeds the set number, **Show more** appears. Click **Show more** to view additional comments.

[+] Show more screenshots.




Genesys • Workspace
Alison O'Brien 21:32
Case Information
Origin: Inbound facebook
facebook party: Alison O'Brien Invited
Show Info
Labuprofen
APP PAGE
Alison O'Brien
July 31 at 8:10 AM • Total Comments : 4
Hello, I am wondering if you can help me
• Comments : 2 of 2 • Collapse All
Comment Delete Unlike
Alison O'Brien
Post
Update Time: Jul 31 at 10:22 AM
Can create new Comments: true
Total Comments Count: 4
Comment Order: ranked
Likes: 1
Total Comments
Labuprofen
July 31 at 9:51 AM • Total Replies : 2
Thanks for your call, yes I can help. Please tell me more.
• Hide • Comments : 2 of 2 • Expand All
Comment Delete Like
Commented By Agent1 Agent1 at 2:51 PM
@alisonavobrien
Total Replies : 0 • Show

Display the actionability and sentiment



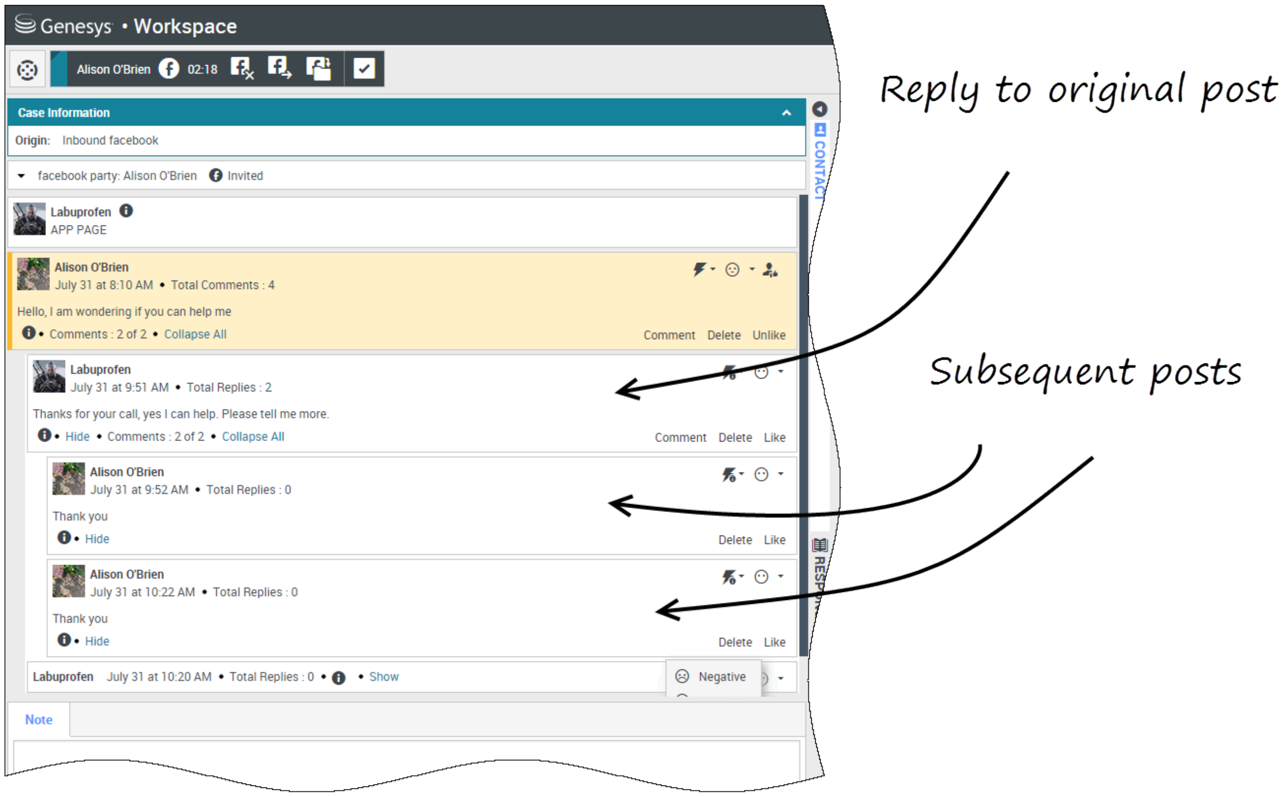
When a Facebook interaction arrives, you can see **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared
- **Sentiment** — Can be Positive, Negative, Neutral or undeclared

Actionable Facebook posts are colored yellow and non-actionable posts are colored gray. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray if they are non-actionable. You can update each Facebook comment's **Actionability** and **Sentiment** icon.

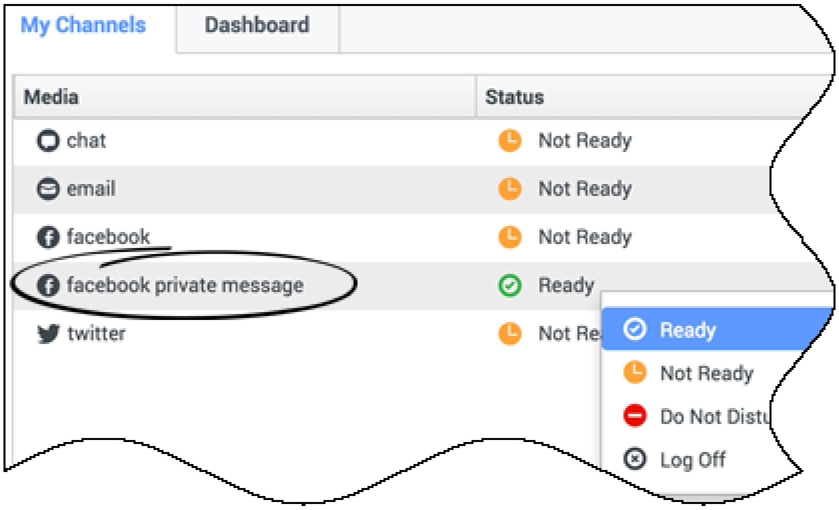
If you favor an interaction, select **Like**.

Reply to comments



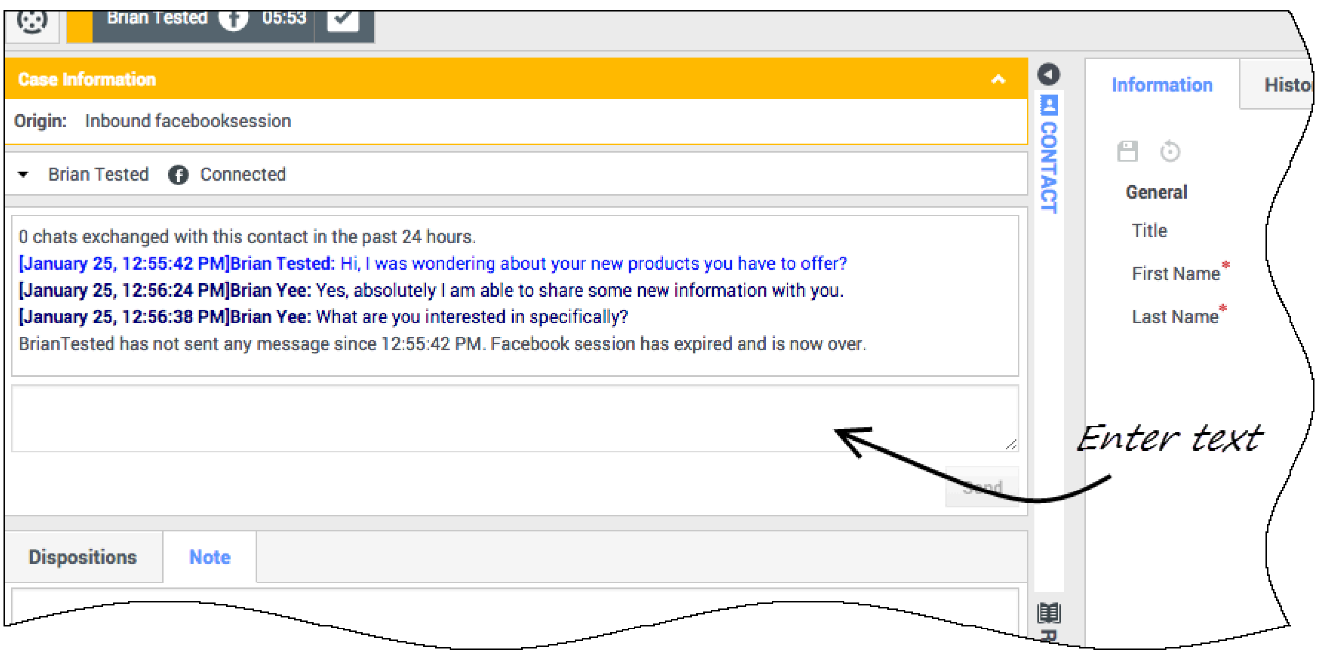
You can reply to the original routed Facebook post, or reply to a Facebook comment. The subsequent comments are indented underneath the original post. Select the applicable comment, enter your reply (you can cut and paste text), and select **Send**.

Reply to a private message: log in



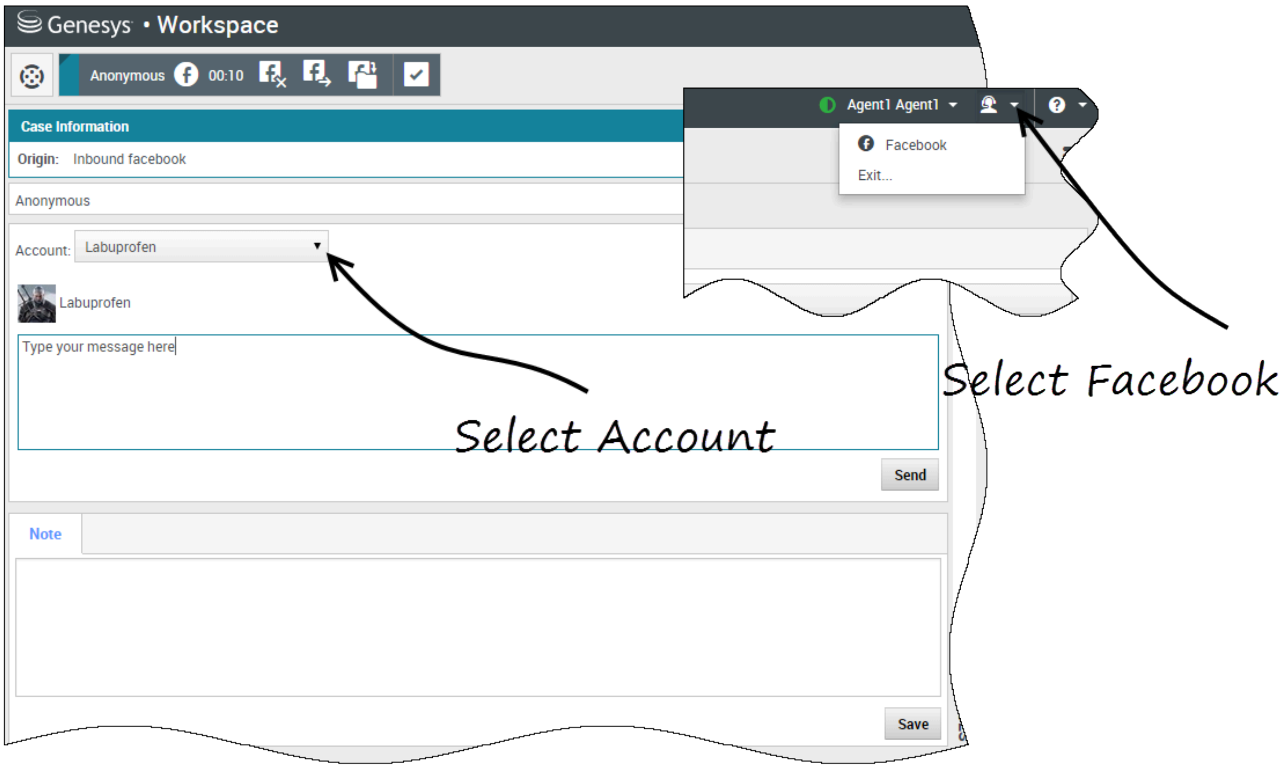
You can reply to a private message from a Facebook contact (you cannot send new private messages). To do so you must log in to a special channel called **facebook private message**.

Reply to a private message: enter your reply



Once you've logged in to the **facebook private message** channel, you can accept private message interactions and reply to them in a way very similar to the way you conduct chat interactions.

Post to Facebook



You can post to your Facebook contact's page. From the drop-down menu beside the **Agent** icon, select **Facebook**. Select the account to which you want to send the post. Type your message and send it to your contact.

Twitter (v8)

Important

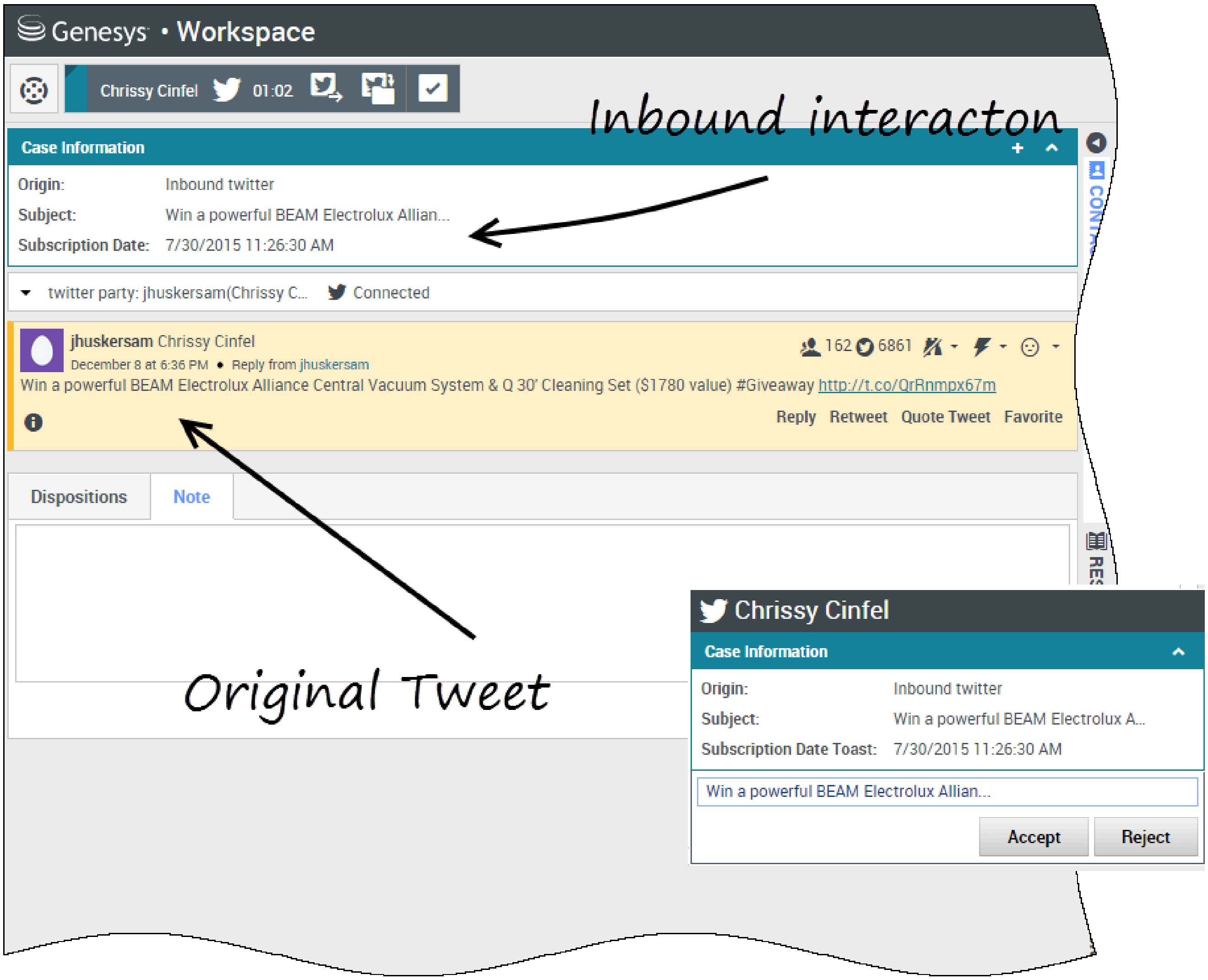
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Twitter, a popular online social networking and micro-blogging service, lets you send and read text-based messages called Tweets. These messages are posted to a person's or a company's Twitter feed, sent to their followers, and are found on Twitter by searching.

Important

- Some Workspace Agent Desktop features are not available in all environments. You might not have this channel available in your environment. Check with your system administrator if you are assigned this channel but do not see it in the **My Channels** tab.
- You cannot attach files or pictures to your comments.

How do I handle a Twitter interaction?



When a new inbound Twitter interaction is sent to your workstation, a preview of the interaction is displayed in the bottom right-hand corner of your desktop.

If you accept, the inbound Twitter interaction view is displayed and the original-routed Tweet appears in the left margin under the Twitter interaction toolbar.

Select **Reply**, or select the down arrow after **Reply**.

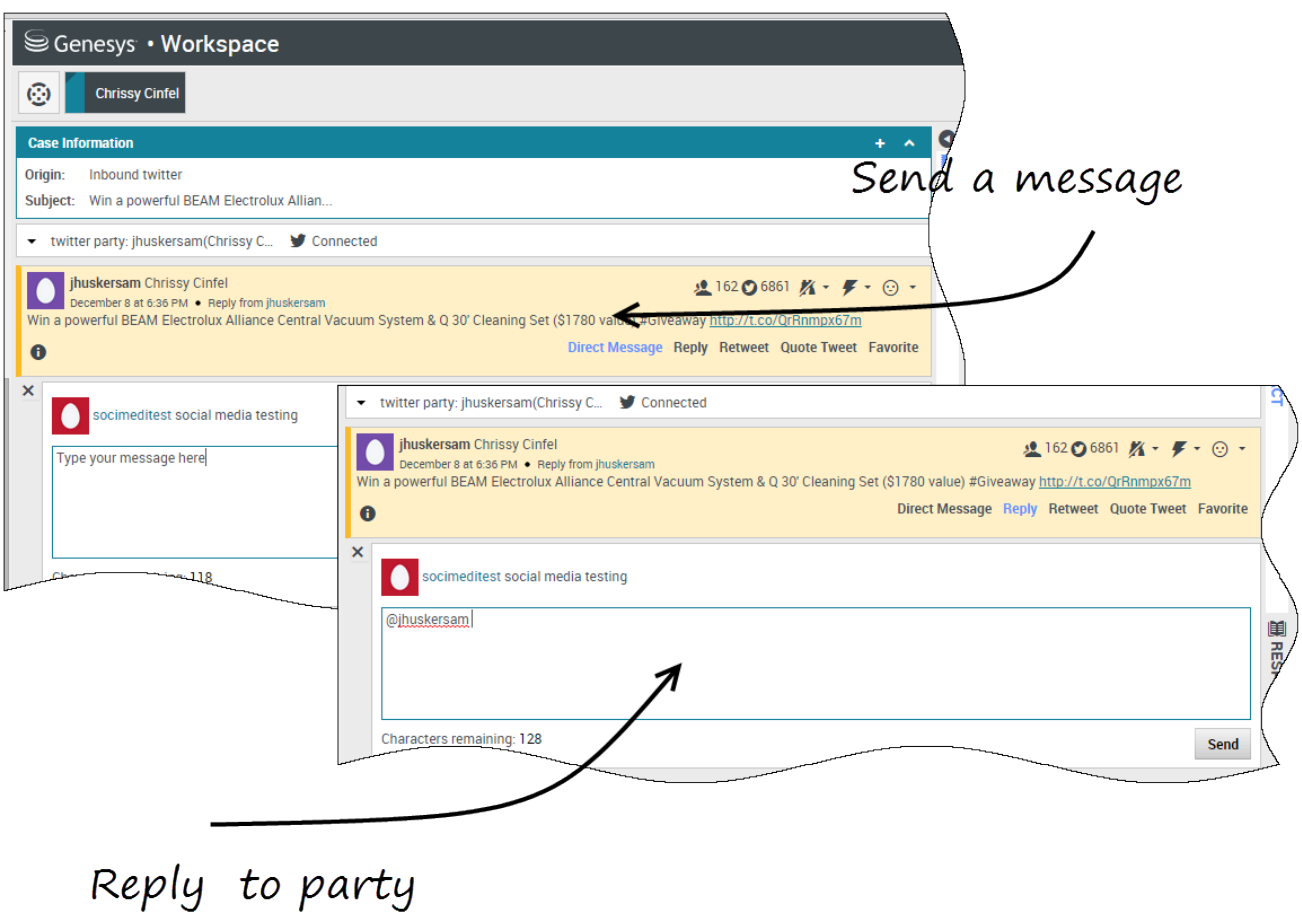
Your message is displayed to the contact on Twitter. Your message is also added to the transcript area of the Twitter interaction view.

To view your Twitter contact's profile information, select the **Show Info** icon or click the username to open the Twitter page that contains the user's profile information.

Some of the things you can do while handling a Twitter interaction include:

- Transfer the interaction to someone else in your company.
- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

Send a message to your Twitter contact

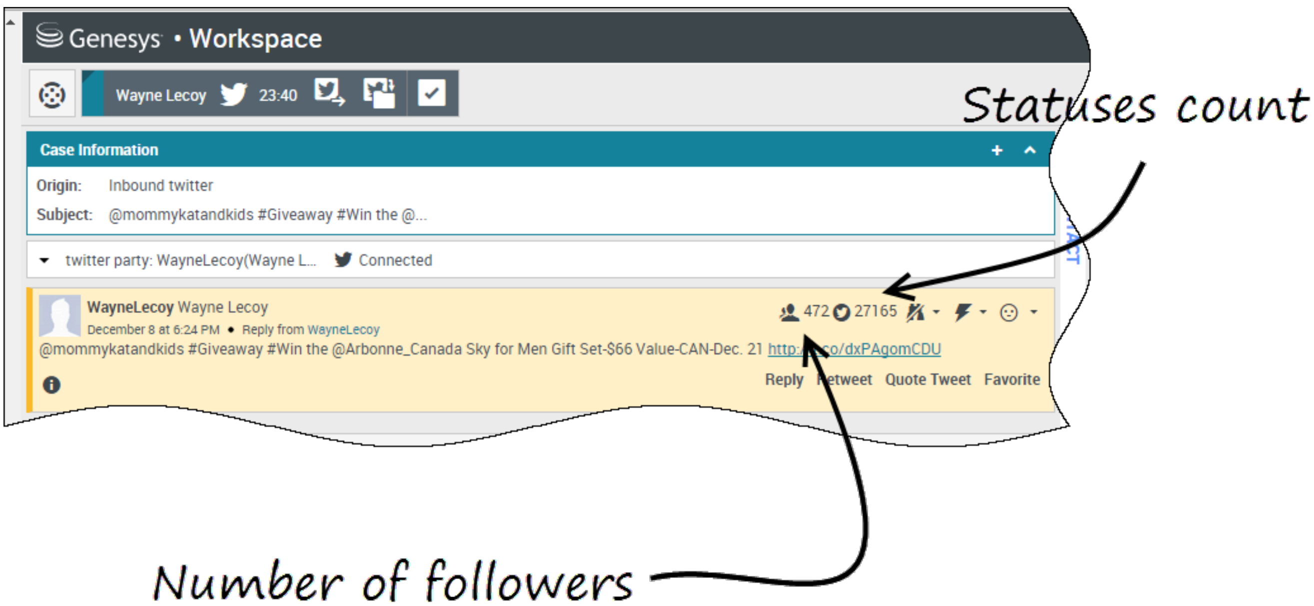


To send a private message to a Twitter contact, select **Direct Message** and type your message in the Message window.

> **Important**
> You can only send a Direct Message to a contact that is following you.

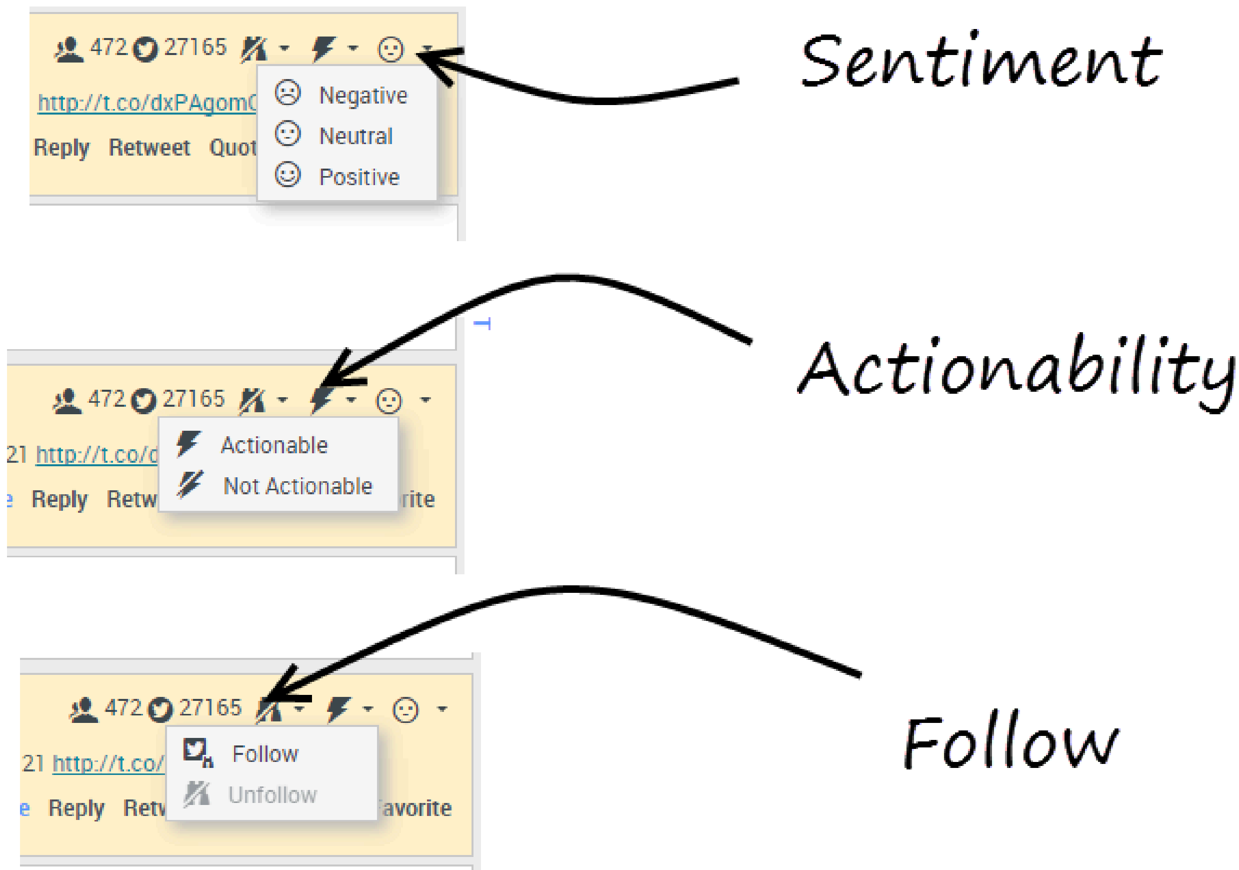
You can also send a reply to the original interaction for everyone to see. Mentions are automatically inserted into replies. The @ sign is used to call out usernames in Tweets, like this: Hello @JoeBelow! When a user name is preceded by the @ sign, it becomes a link to a Twitter contact's profile.

Display the number of your Twitter contact's Tweets and followers



The number after the **Statuses Count** icon indicates the number of user Tweets. You can also see how many followers the user has.

Display the actionability and sentiment

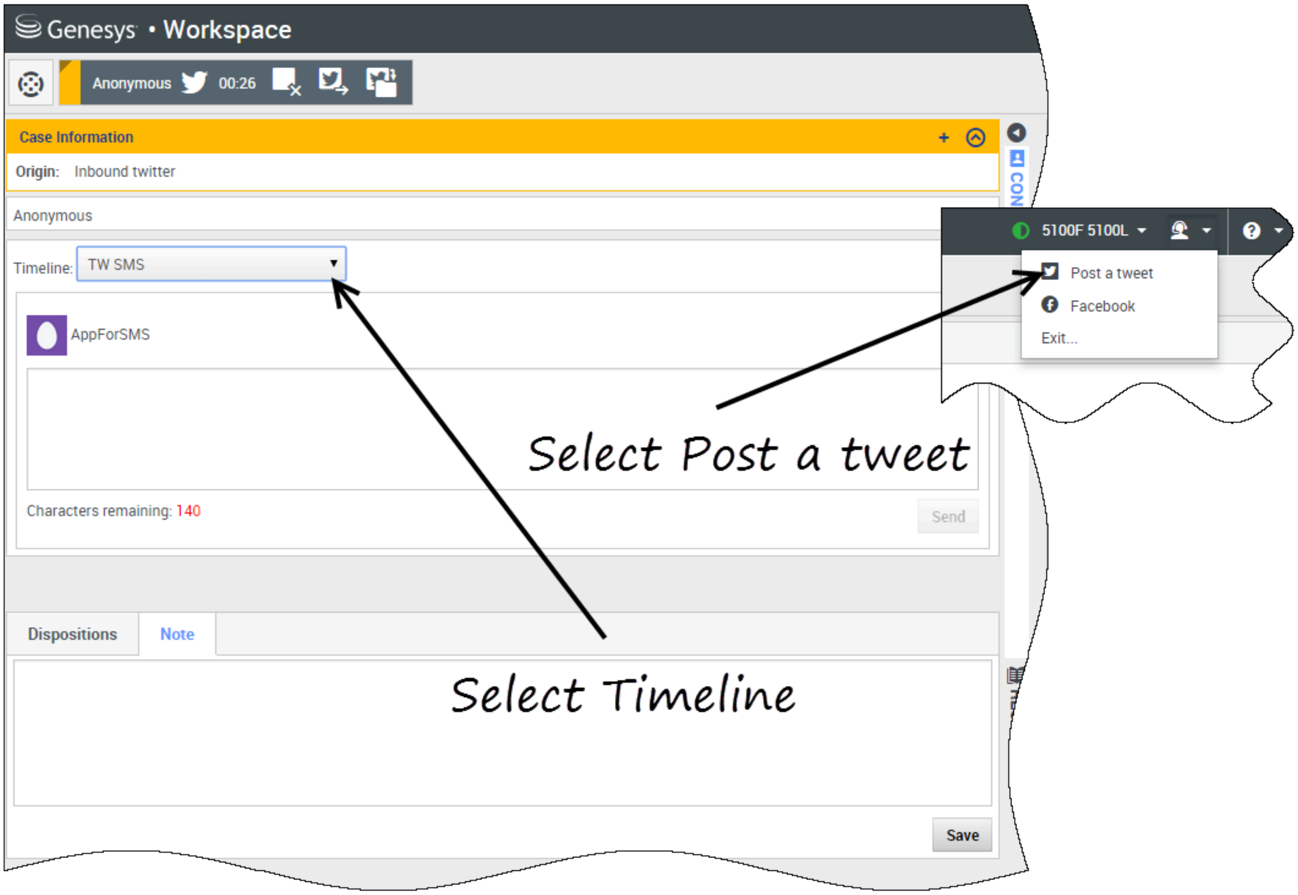


When a Twitter interaction arrives, you can view **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared.
- **Sentiment** — Can be Positive, Negative, Neutral, or undeclared.

You can become or stop being a follower of an author of the Twitter message. Select the **Followed** button to unfollow the selected account.

Post to Twitter



You can post a tweet to your Twitter contact's page. From the drop-down menu beside the **Agent** icon, select **Post a tweet**. Select the Timeline you want to post the tweet on. Type your message and send it to your contact.

Customer interactions (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

A customer interaction has two parts: the actual communication with the customer over one or more channels, and the tools that help you address the customer's issue.

> **Important**
> What you see in Agent Desktop depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

What kinds of customer interactions can I receive?

Depending on your assignment, you might receive interactions through almost any channel, directly from customers or by way of a consultation, conference, or transfer. Some contact centers are set up to always direct interactions from the same customers to the same agents. If your assignment is set up this way, then you will be able to assist certain customers whenever they call, email, chat, and so on.

What kinds of customer interactions can I start?

Depending on your assignment, you can:

- call a customer directly
- make outbound calls as part of a campaign
- send an email

- send Tweets or post to Facebook, though more likely your social media interactions will begin with customers

Only customers can initiate chat sessions.

Can I use more than one channel at a time?

In some cases, you can use multiple channels during a single customer interaction. You can, for instance, send an email to customer you are speaking with.

Where can I find answers to common questions or problems?

First, try standard responses, your own contact history, and any customized knowledge repositories your contact center uses. If none of those options works, you can start a consultation with one of your team members.

How do I search through my previous interactions with customers?

You can view customer interactions in three ways:

- My History lets you browse your interactions
- The Contact Directory lets you browse all interactions with a customer or team member
- Interaction Search lets you browse the complete interaction database using either a Quick Search or an Advanced Search

How do I accept an incoming interaction?

New interactions (calls, chats, emails, or social media postings) arrive at your workstation in a pop-up, which lets you decide whether to accept or reject the interaction. If you take no action at all, it will eventually time out and go to the next available agent.

If you're configured for auto-answer, of course, you can't choose to reject an interaction.

Many browsers, such as Google Chrome, Mozilla Firefox, and Microsoft Edge, also display notices to you about interactions and other events. You can manage these notifications through the settings in the browser. See the help for the browser you are using if you want to control browser notifications.

Why do my emails contain odd-looking codes?

Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

What are these other websites I'm seeing?

Internal and external websites might be integrated into your Agent Desktop main view by your administrator. At the Agent Desktop level, the external website is displayed in dedicated tabs. These tabs allow you access to the website without leaving Agent Desktop.

At the case level, there are two ways to display websites depending on the display mode of the main interaction type.

- For voice, the external website is displayed in the background when an interaction is selected. When the interaction is unselected or closed, the external website is replaced with the previous panel displayed in the background.
- For multimedia, the external website is displayed in a dedicated view in the case itself.

How do I set a disposition code?

You can assign one disposition code to an ongoing or terminated interaction to characterize the outcome of the interaction.

The Disposition Code view is a tab in the Interaction view. It contains a list of choices that you can click to specify the outcome of the interaction. A search field is available to search among the disposition codes.

The Disposition Codes are organized within grouping folders, which cannot be selected as dispositions. These grouping folders do not correspond to business attributes, as they are only textual information.

Select a disposition for the interaction. Once a disposition is selected, the disposition list is hidden and the selected disposition appears in a textbox located at the top of the listing. You can't edit a disposition but you can select a new one.

The complete path to the disposition is available as a tooltip of the disposition name.

Depending on your system configuration:

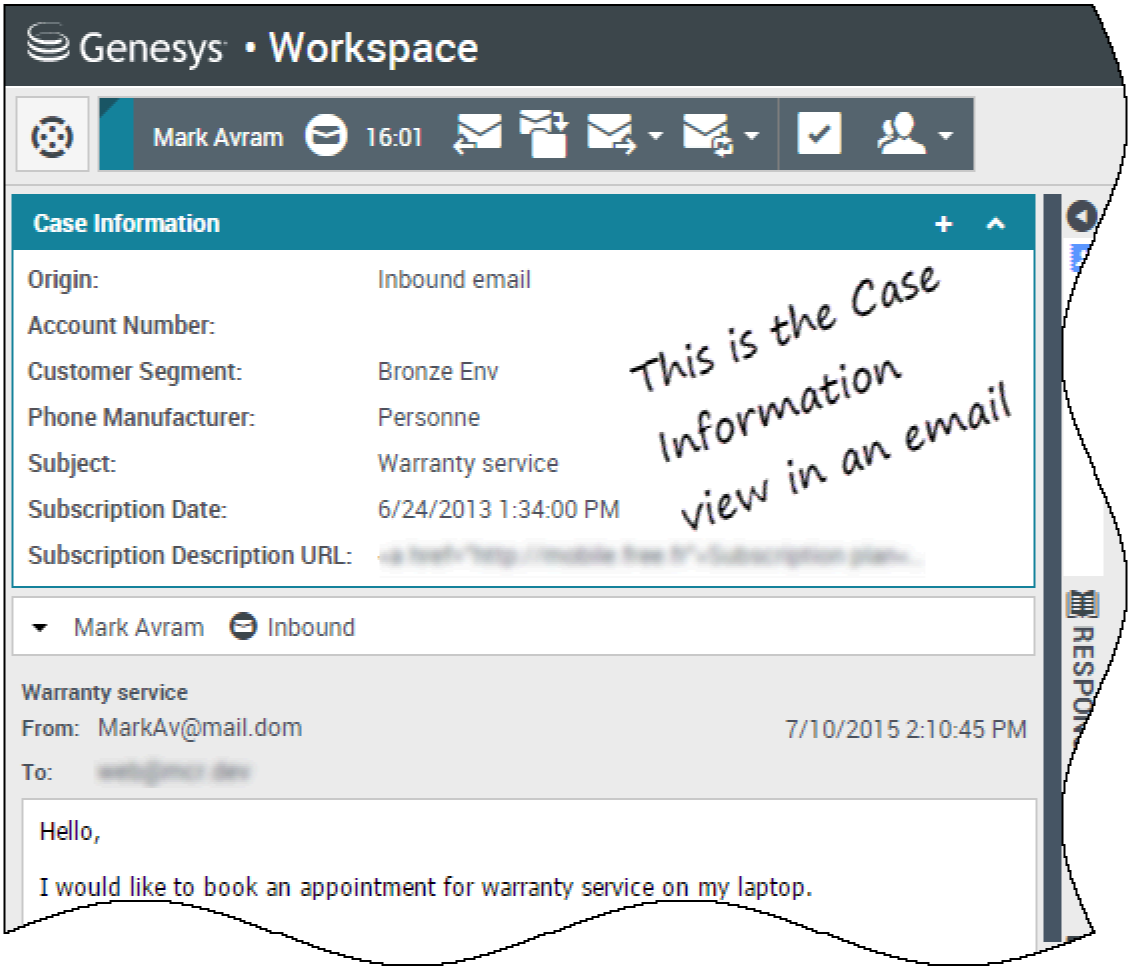
- You might have to set a disposition code before you click **Mark Done**.
- You might be able to click **Mark Done** without a disposition code.
- The Disposition Code view might not be displayed.

How do I add a note to an interaction?

The note is a feature that enables you to enter comments about the current interaction or about a selected interaction. You can view the note in most channels as well as contact history, My History, and My Workbin.

Important: You must click **Save** to store your note.

How do I work with case information?



The case information view (also called attached data) provides information about an interaction — for example, an account number or type of service.

Some case information might be displayed as the title of the web page, an anchor, or a link. If the link is active, it is displayed as blue text.

To make changes, select the field you want to edit or delete. Fields that you can edit display a pencil icon when you roll your mouse pointer over them.

You can add more fields with .

Contacts (v8)

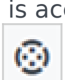
> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Contacts can be team members or customers and are stored in the Contact Directory. From the Contact Directory, you can call or email a contact, manage a contact's profile information (such as their name, phone number, email address), and review a contact's past interactions.

Where are my contacts?

Link to video

There are a few different ways that you can access your contacts:

- Open your Contact Directory by selecting **Contact Directory** from the Supporting Views menu. This contains all of your contacts, such as team members, customers, and any external contacts.
- Use the Team Communicator to quickly contact a team member, or a favorite or recent contact. This tool is accessed from the **Type name or number** search bar near the top of the screen (or by clicking the  button, if you are working with an interaction).

Watch the video to see an overview of the Contact Directory.

How do I find a contact in the Contact Directory?

Link to video

The easiest way is to use the **Quick Search** option.

Start typing a name, phone number, or email address into the **Quick Search** field and the matching results are returned in the **Contact** list.

Customize the search results by using  to toggle between grid or list view, or click the headers to sort by column (list view only).

Watch the video to see how you can search the directory and customize the results.

What is the difference between List View and Grid View?

The Contact Directory uses two different kinds of search modes to find contacts in the Contact Database.

- List View — searches each field of the contact database for the keywords that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria.
- Grid View — searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase.

See below for more details about these views.

List View

Click the **Show Contacts in List View** button () to display the **Contact Directory List** view.

The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria. The search is a 'keyword' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' to search for the keyword(s) that you provide.

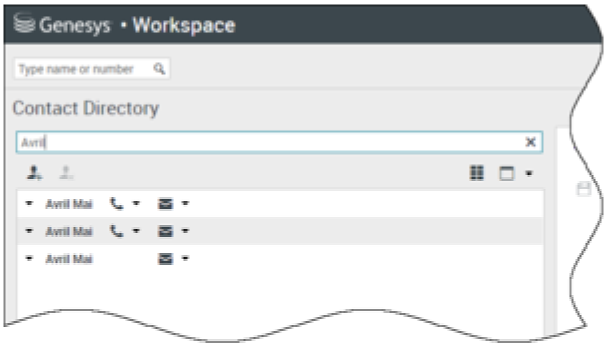
Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**= *Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd*.

Results are returned in a list that is not sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria (the sort order in this context is undefined).

Tip

> Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.



Grid View

Click the **Show Contacts in Grid View** button () to display the **Contact Directory Grid** view.

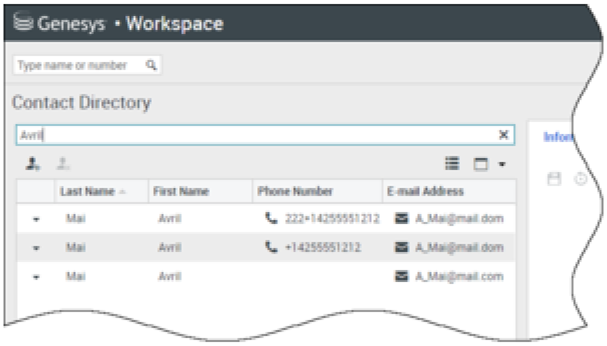
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase *John Pa* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John Paul* and **Last Name**=*Doe*
- Quick search using the phrase *John Daly* as the criteria in quick search defined to apply to only the **First Name** and **Last Name** will *not* match a contact where **First Name**=*John* and **Last Name**=*Daly*

Results are returned in tabular form and sorted according to the default search field, such as **Last Name**.

The Grid view can be used to help to refine your search by sorting the results.



Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

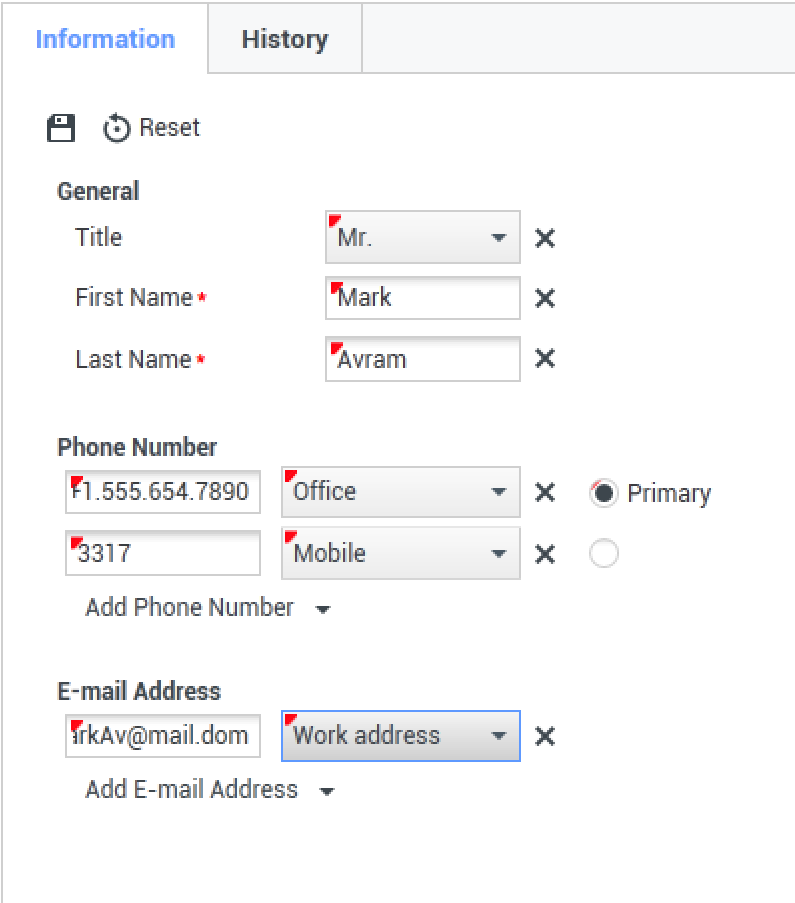
What actions can I take with a contact?

Link to video

- Call or email the contact.
- View and manage their profile **Information**.
- View their **History** of interactions.
- Use 👤× to delete the contact.
- Use **More Actions** to perform other actions (depends on your permissions).

Watch the video to see how you can call or email a contact from the Contact Directory.

How do I add a contact?



Your site might be set up to add new contacts automatically. But if you are working with a contact who is not in the Contacts Directory, you might be able to add them yourself while the interaction is still active.

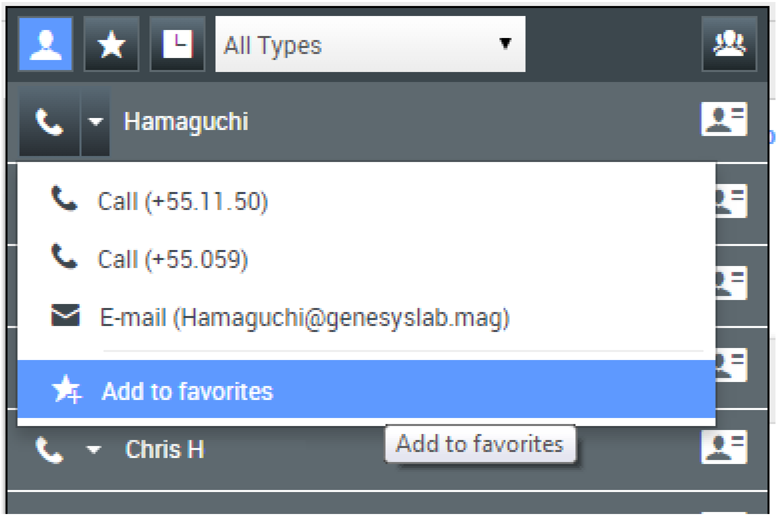
to create a new contact.

to save your changes.

to reset and clear any unsaved information.

You can also add additional phone numbers and email addresses for the new contact, and specify a phone number or email address as the *primary* contact number or address.

How do I set up my favorites?



Typically, your favorites are team members you contact frequently. You can mark a contact as a favorite by selecting **Add to Favorites** from the drop-down actions menu in Team Communicator. You can also assign the favorite to a category.

To see your personal and corporate favorites, select (favorites filter) on the Team Communicator bar.

Favorites are marked with a (star). Use the filters and sorting options to change the types, categories, and order of your favorites.

To make changes to a favorite, use **Edit Favorite**. To remove a favorite, use .

Favorites marked with (locked star) are corporate favorites, and can't be edited or removed. The same favorite can belong to both your personal and corporate favorites, but it will be shown as a corporate favorite in the results list.

Note: A favorite that you created by directly dialing a contact will appear only in a favorites search *and* your list of recent calls if you previously called the person.

Contact and interaction history (v8)

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Agent Desktop lets you look at the interactions that you and your coworkers have worked on in the past. You can view information about the interactions, including notes and case data. You can also open and process some interactions.

How can I find the interactions I've worked on?

The My History view enables you to view and manage your previous interactions with a contact.

To display the My History view in the main view, click and select **My History**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

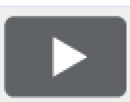
The My History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

[+] Show video: My History: Quick Search

Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.



[+] Show video: My History: Advanced Search

Link to video

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

How do I explore the history of a contact?

The Contact History view lets you see and manage previous interactions with a contact you have selected from the Contact Directory or from the information view of the current voice, chat, email, Facebook, or Twitter interaction.

	[+] Show video: Contact History Link to video

Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- View information about the selected interaction..

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Contact History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

	[+] Show video: Contact History:Quick Search Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

[+] Show video: Contact History: Advanced Search

Link to video

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

How do I find any interaction?

Sometimes you need to find an interaction that someone else at your contact center worked on, or maybe you worked on it, but you can't remember who the contact was or when you worked on it. You might be a team lead or supervisor who is looking for interactions related to a specific topic or was processed by a specific agent or agents.

The Interaction Search view lets you search the entire interaction database for all media types, with all contacts, and handled by any agent.

To display the Interaction Search view in the main view, click and select **Interaction Search**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Interaction Search view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

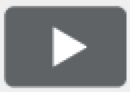
You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

Using Quick Search

The Quick Search field lets you to enter keywords or a phrase to search for in the interaction database, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.



[+] Show video: Quick Search

Link to video

Searches of customer information like name and address, and of interaction information like subject or body text are 'starts-with' searches, meaning that each of the fields that you are allowed to search for words or strings, are searched for words that start with the keywords that you enter in the Quick Search field.

Searches of information that has been customized by your administrator are 'equals' searches, meaning that the search looks for exact matches with what you enter. Ask your administrator about custom information.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
  - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
  - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

When you find the interaction you are searching for, select it to view the details and other information in the Details, Notes, and Case Data tabs.

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

Using Advanced Search

The Interaction Search *Advanced Search* feature lets you choose a set of conditions that you want to use to limit the search to only those interactions in the interaction database that match the conditions you specify.

[+] Show video: Advanced Search

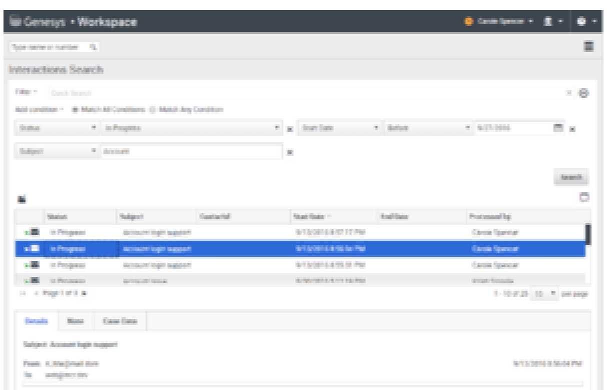
Link to video

Click next to the Quick Search field to open the Advanced Search view.

Tip

Your administrator decides what conditions you are allowed to search on, so your Interaction Search view might not exactly match the screen shots and video.
For the **Add Condition** menu, your administrator might have set up groups of conditions which appear as submenus. This makes it easier for you to find the condition you want to use.

This is what the Advanced Search view looks like:



Use the controls described here to set up your search, then click **Search** to find the interactions that match the conditions that you specify.

When you find the interaction you are searching for, select it to view the details and other information.

Filter

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

Add Condition

Use the **Add Condition** menu to add search criteria to the Advanced Search view. When you make a selection from this menu a new condition entry is added above the **Search** button. Add as many conditions as you need. The view will scroll if necessary.

To remove a condition, click the X next to the entry.

Each condition entry that you add lets you refine your search. For example, you might limit your search to interactions that have a status of "In Progress". You might know approximately when the interaction was handled. the **Start Date** and **End Date** conditions let you limit the search to interaction handled before, on, between, or after a certain date.

For some conditions, you might have to enter text instead of selecting criteria from a menu or picking a date.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
    - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
    - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

For some conditions, you might have to search the contact database or search for someone in your contact center, such as other agents who processed the interaction you are looking for. For searches of contacts and internal targets, the Team Communicator opens when you click in fields such as **Processed By**.

Match All/Any Conditions

Use the **Match All Conditions** option to limit the search to only those interactions that meet *All* of the conditions that you specify.

Use the **Match Any Conditions** option to find the interactions that meet *at least one* of the search conditions that you specify.

Viewing search results

The search results are displayed in the interactions table. The search results table is not sortable. To sort the interactions table, clear the search field to display the full history set.

Important

Agent Desktop returns a maximum of 100 interactions. If you do not find the interaction you are searching for, you might have to refine your search criteria further.

Navigating the search results table

After you click the magnifying glass in Quick Search or **Search** in Advanced Search, Agent Desktop looks through the interaction database to find interactions that meet the conditions that you specified.

All the interactions that are found are displayed for you in the search results table. The table displays results in pages if many interactions are found. If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page.
- Click the **Go to the Previous Page** button () to view the previous page.
- Click the **Go to First Page** button () to return to the start of the list of search results.
- Click the **Go to Last Page** button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

Details, Notes, and Case Data

The **Details**, **Note**, and **Case Data** tabs display information for any interaction that you select in the search results table.

- **Details** — displays interaction specific information. For example, if you have selected an email interaction, the Subject, From, To, State, and body of the email interactions are displayed.
- **Note** — enables you to view notes written by the agents who handled the interaction.
- **Case Data** — enables you to view the Case Data/case information and other attached data for the selected interaction.

Workbins (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

A workbin is like a personal queue or storage area where you can store email, Facebook, and Twitter interactions to be handled later.

As an agent you have two different workbins that you can use. If you are a Supervisor (Team Lead), you might have additional workbins that you can use to manage the interactions of the agents that you supervise, and you might be set up to edit Case Information.

You can access all of your workbins from the **Supporting Views** () menu.

How do I use the My Workbins view?

To view another workbin, select it in the Workbin explorer on the left-hand side of the view. The number of unopened email messages in each workbin folder is indicated next to the name of the workbin folder.

The list of available workbins depends on how your system is set up by your administrator. Some of the workbins which might be configured for you include:

- **In Progress** contains unprocessed inbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save in Draft Workbin**.
- **My Drafts** contains outbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save in My Draft E-mails Workbin**.

To view details, notes, and case date about an interaction that is stored in one of your workbins, select it. Information about the selected interaction is displayed in the tabs at the bottom of the Workbins view. To display the interaction information tabs, click the **Show/Hide Details Panel** button. ()

To open an interaction for editing or handling, select it and click .

Standard responses (v8)

Important

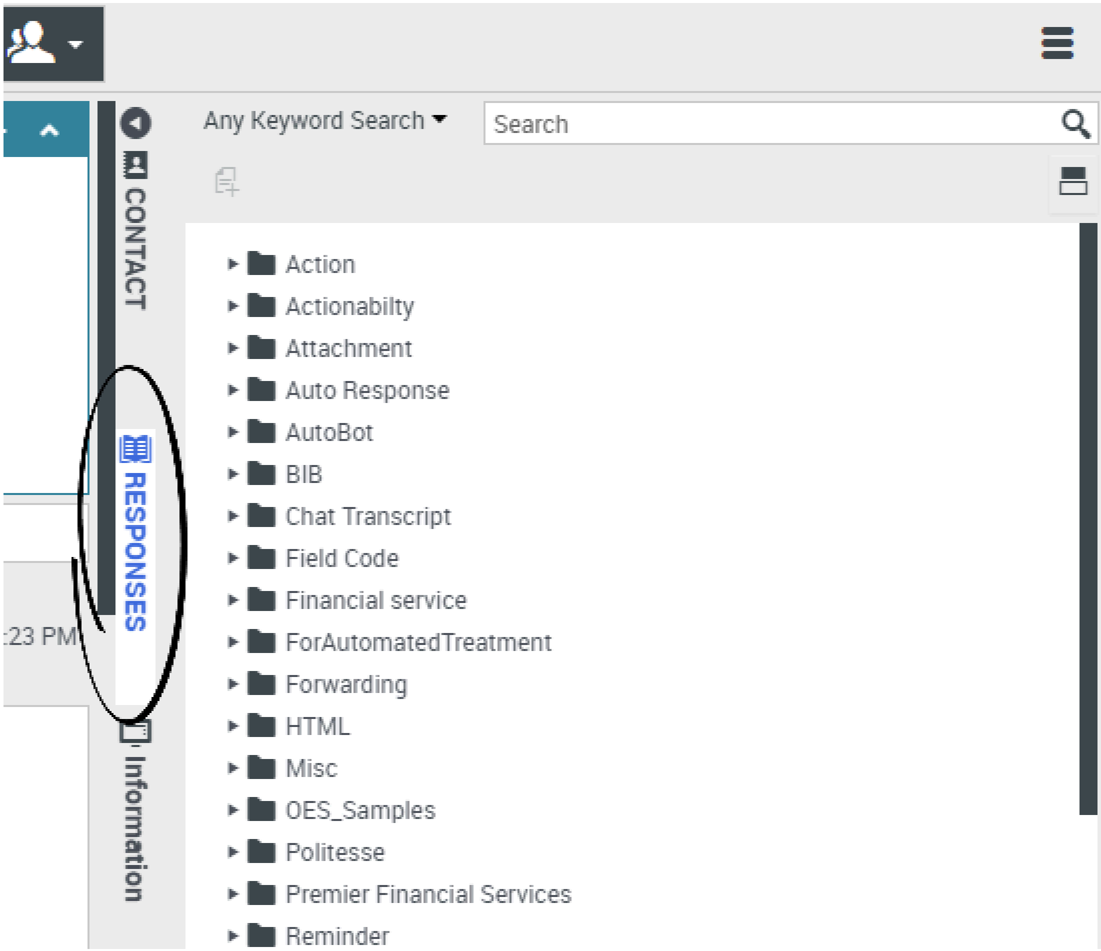
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Responses view enables you to access a database of prewritten standard responses for your interactions. You can insert a response as reply into any outbound interaction, such as an email or a chat message, or you can read them to the contact during a phone interaction.

After inserting a response into an outbound interaction, such as an email or a chat message, you can modify the contents of the text.

Show video: **Adding a Standard Response to an outgoing email:** Link to video

Using the Responses View



To access the Responses view, select the vertical **RESPONSES** button on the active-interaction window.

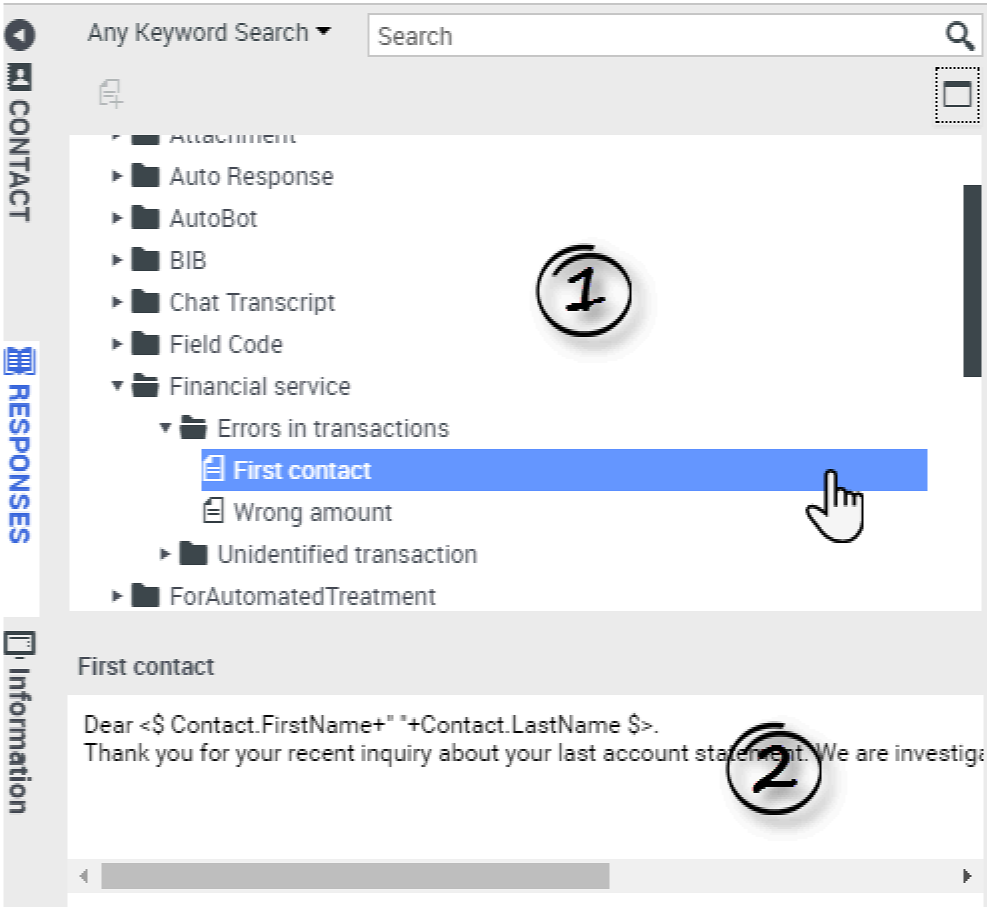
The Responses view comprises two main areas: Responses Explorer folder view and the response display area.

You can find responses in one of two ways:

1. Browse using the Responses Explorer folder view

1. Search the responses database by typing in the Search and Filter field.

Responses Explorer



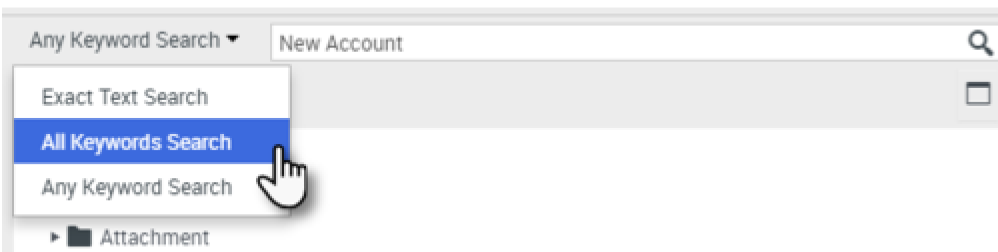
The Responses Explorer contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can:

- Select a response in the explorer area (1) to view its contents (2).
- Navigate the responses folders and documents by selecting folders to open or close them and selecting documents to select them.
- Insert standard-response text into the current interaction at the insertion point by selecting a response document and then selecting **Insert Standard Response Text**.
- Show and hide the responses details area by selecting **Show Detail**/**Hide Detail**.
- View the contents of the selected response document in the responses details area.
- Copy content from the responses details area and paste it into the message area of your email or chat interaction. Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

Search and Filter

The Search and Filter area enables you to specify keywords for which to search in your company's Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, and click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
    - **Any Keyword Search**—Find all responses that contain at least one of the specified keywords.
    - **All Keyword Search**—Find all responses that contain all of the specified keywords.
    - **Exact Text Search**—Find all responses that contain the specified keywords in the order in which they are specified.



Tip

The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

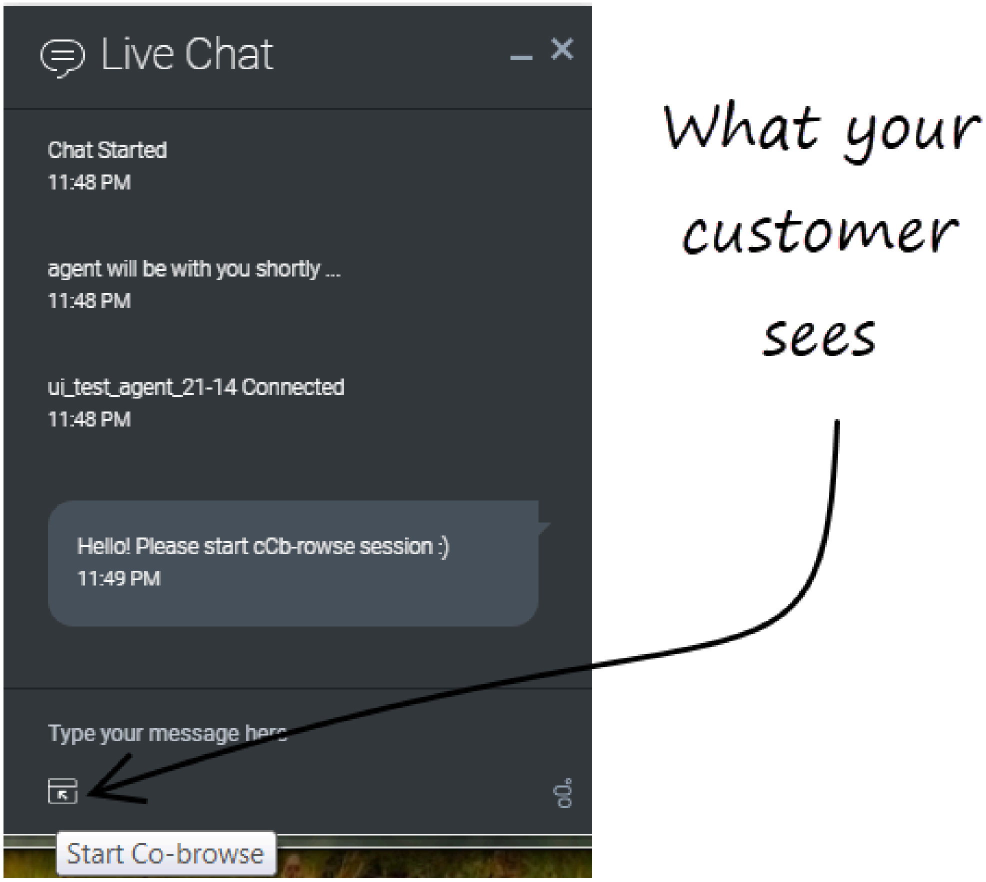
Co-browse sessions (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

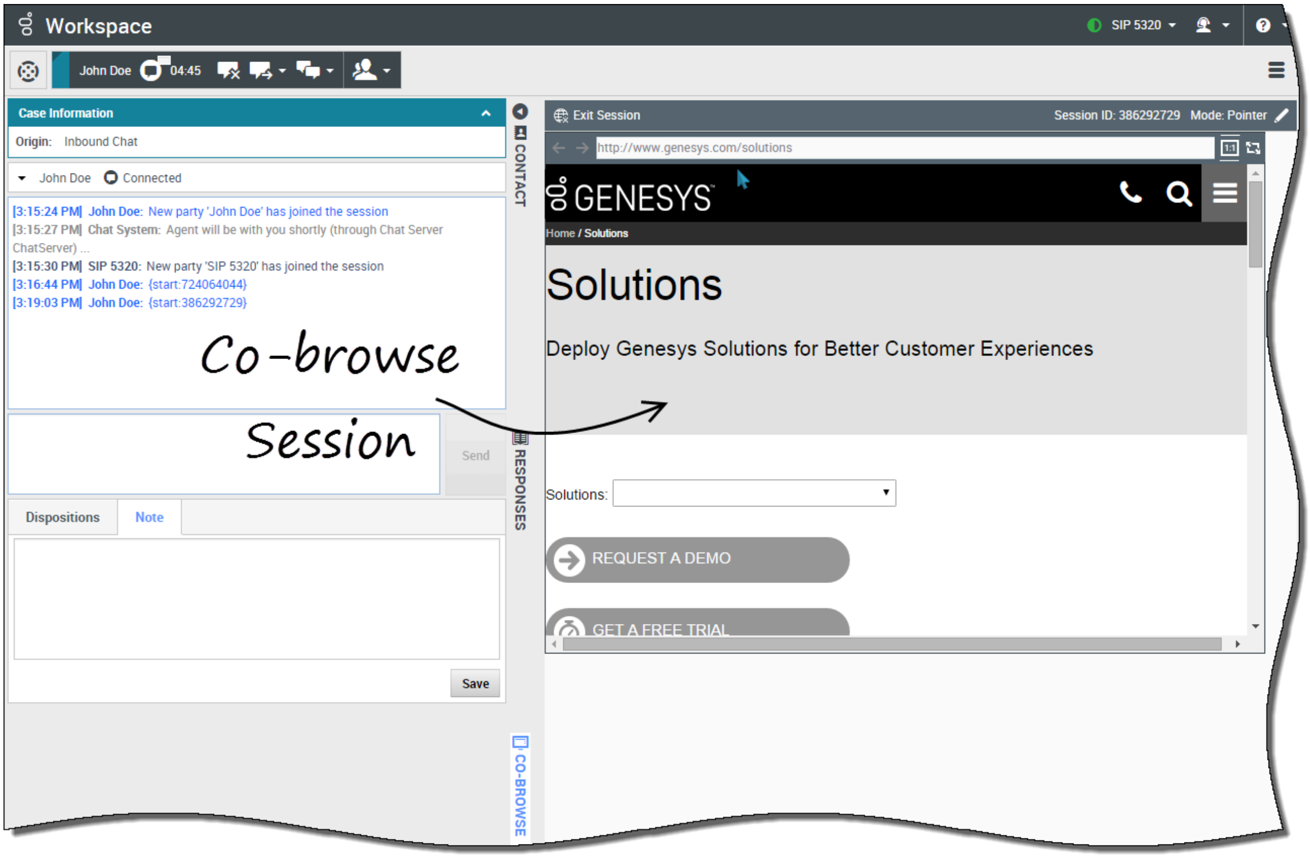
A Genesys Co-browse session lets you and a customer navigate the same web page at the same time. Unlike conventional screen-sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session both you and the customer share the same instance of the web page.

Start a Co-browse session



The customer *must* initiate a Co-browsing session. You cannot start a Co-browse session. Websites set up for Genesys Co-browse include a widget with a **Start Co-browse** button that the customer must click to start a Co-browsing session.

One of the widgets that your customer sees might look something like this. Clicking the **Start Co-browse** button will present the customer with a session ID.



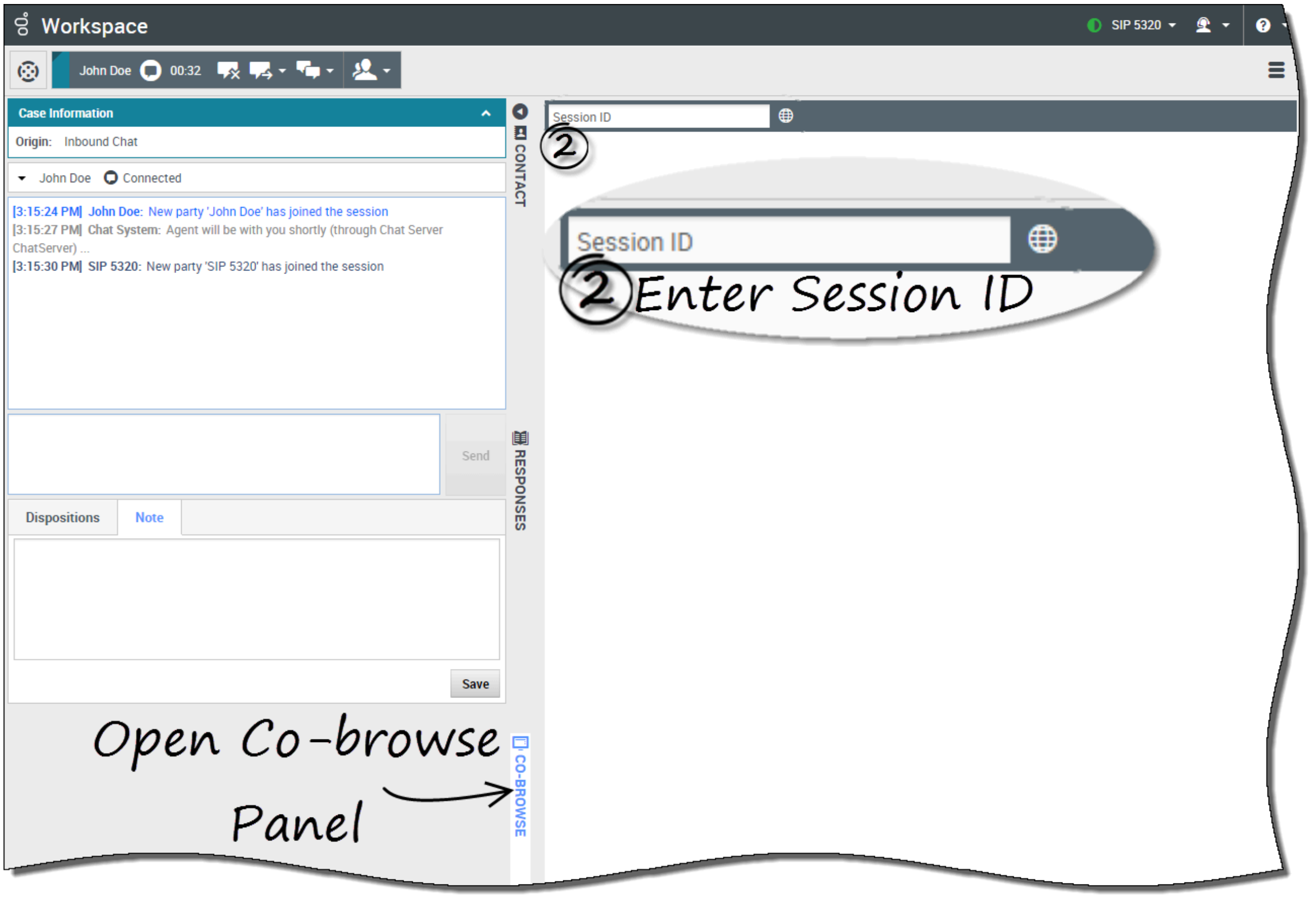
If you are engaged in a chat with the customer, the Co-browse session will automatically start in your desktop. Once the Co-browsing session starts, you see a special message in chat—**{start:123123123}** for example, where **123123123** is the session ID.

You can only have one Co-browse session open at a time (regardless of how many chat sessions you might be handling).

Important

For security considerations, you will see placeholder graphics for certain website elements.

Start a Co-browse session using a session ID



If you are on a call or a chat and your Co-browse session does not automatically start, you can use a session ID to start a Co-browsing session.

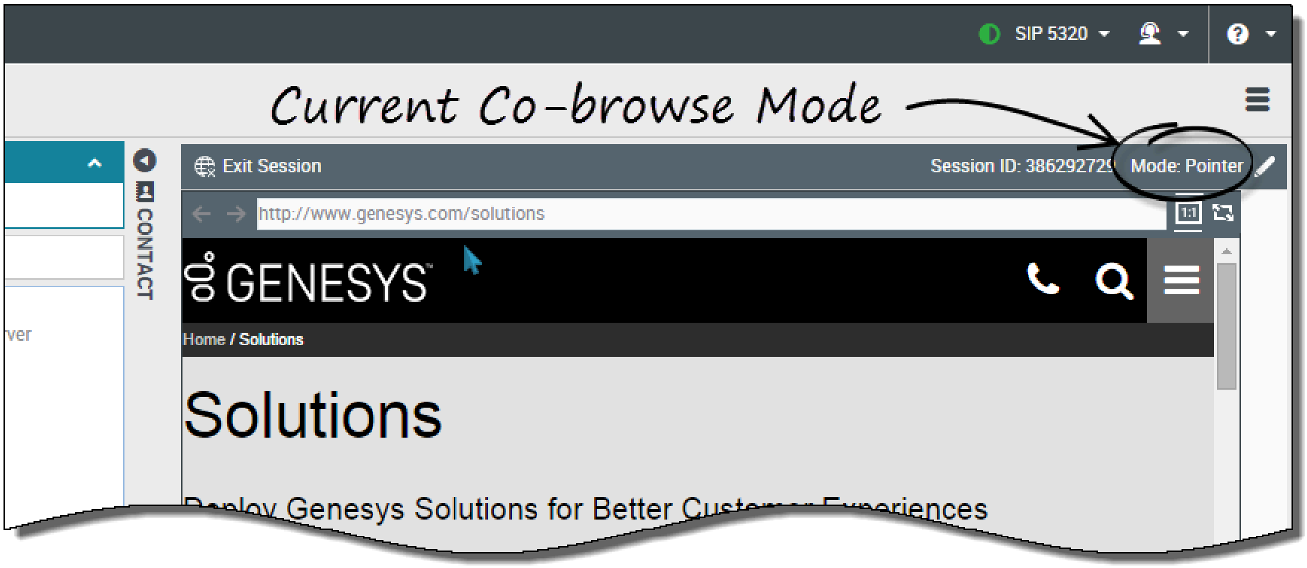
Get the session ID from the customer and enter it in the **Session ID** field, then click the globe icon.

You should now see the customer's browser. You do not need to navigate to the same page as the customer. Co-browse uses the session ID to make sure that you and the customer are viewing the same page. As soon as the session starts, the customer receives a notification on their screen that they have started a Co-browsing session.

Important

Genesys Co-browse does not support conference or transfer for chat and voice.

Use Pointer Mode

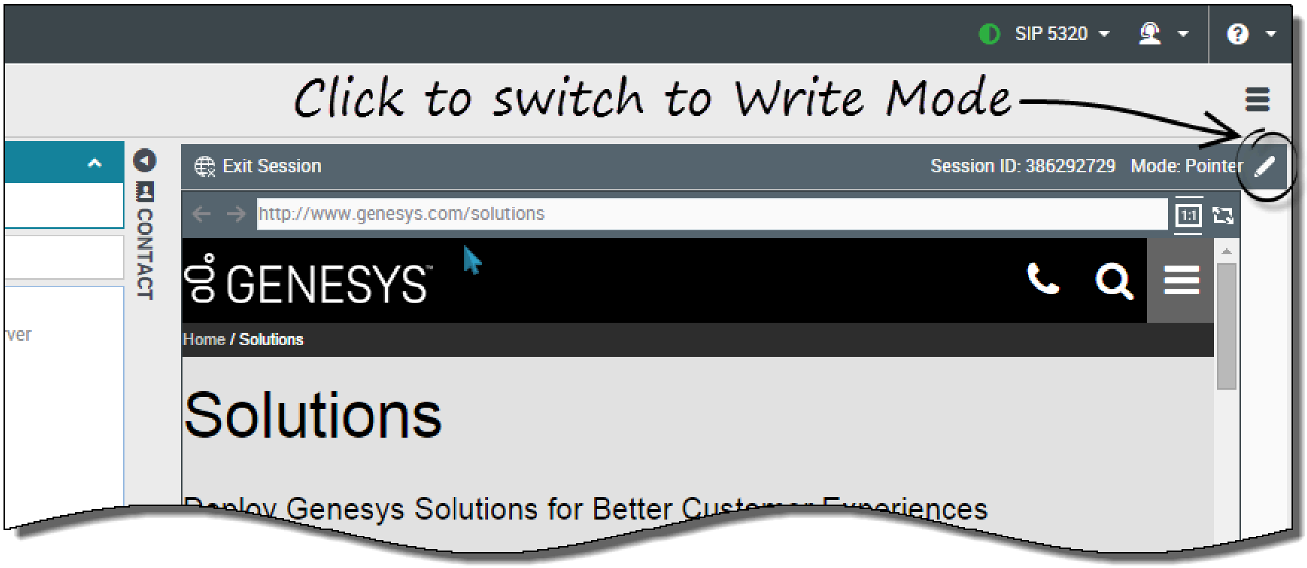


When you first join a Co-browse session, you are in *Pointer Mode*. You can see what the customer sees but you cannot perform any actions in their browser. You cannot navigate, input information, or submit forms.

You and the customer can see each other's mouse movements at all times and your mouse clicks create a red circle effect around your mouse pointer. Use the red circle effect to direct the customer to specific sections on the web page.

At any time, you can send a request to the customer to enable *Write Mode*.

Switch to Write Mode



In Write Mode, both you and the customer can perform conventional user actions. Both of you can enter text and click buttons.

To switch to Write Mode, click the pencil icon at the top right corner of the Co-browse area. The customer is asked to approve the switch to Write Mode. Write Mode is enabled only if the customer approves. You receive a notification about the customer's response.

If the customer approves the switch to Write Mode, the pencil icon turns into a pointer icon.

Tip: If Write Mode is disabled by administrators, you will not see the pencil icon.

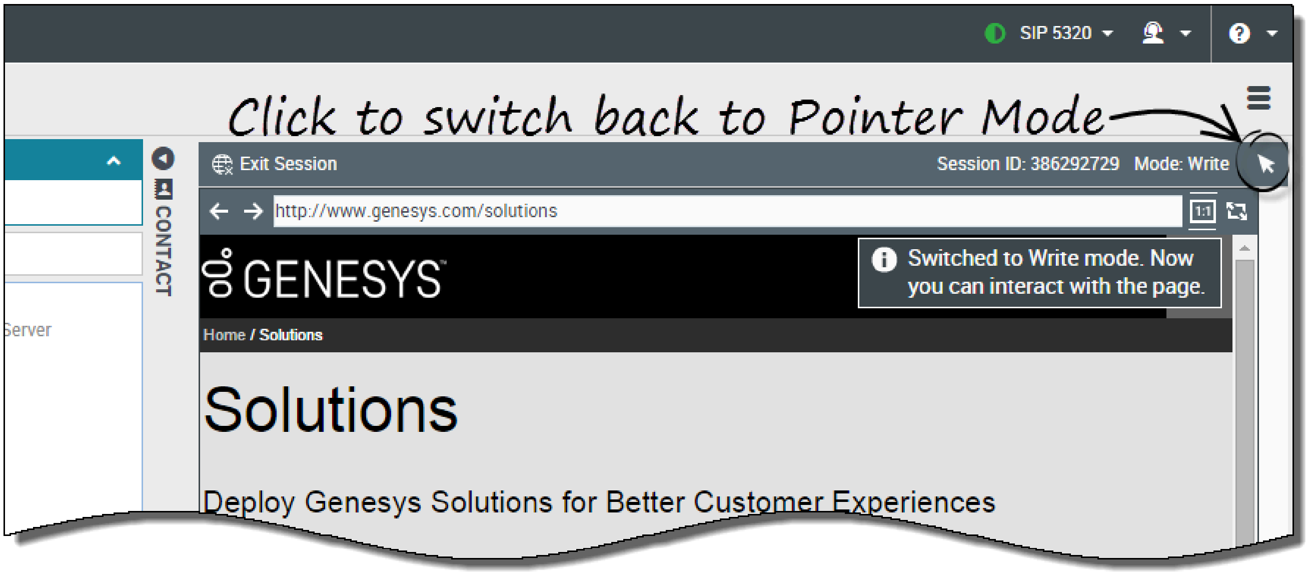
In Write Mode, you can navigate by clicking links in the web page or by using the following navigation options in Agent Desktop:

- Click the back and forward arrows.
- Type a URL into the URL bar and press **Enter**.
- Click **Refresh** to reload the page.

Administrators can limit which interactive elements are enabled for you in Write Mode.

You can only co-browse while the customer is on your company's site. If the customer goes to another site, the co-browse session stops until they come back to your site.

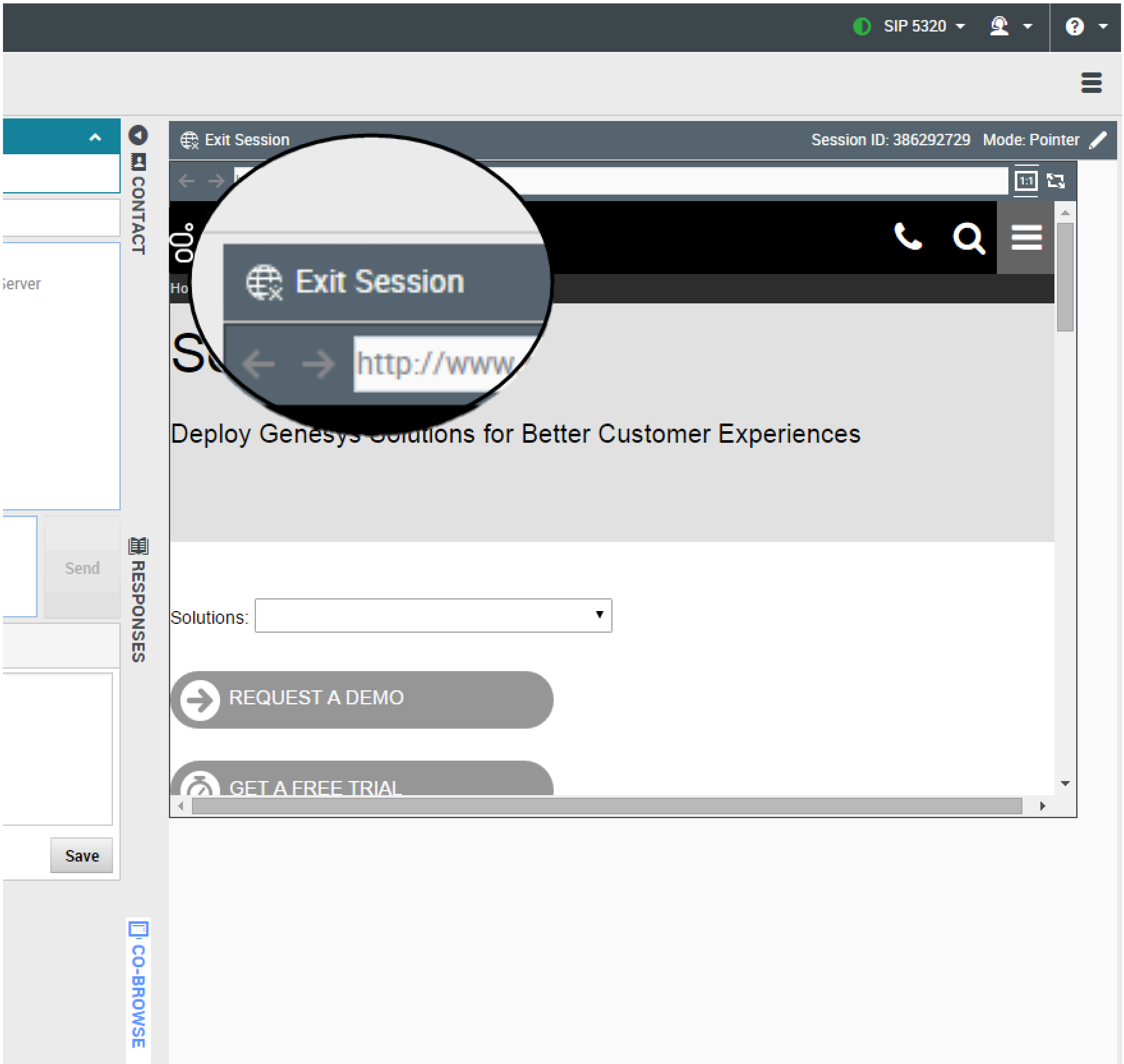
Switch back to Pointer Mode



To switch back to Pointer Mode, click the pointer icon at the top right corner of the Co-browse area.

The customer can also switch back to Pointer Mode at any time.

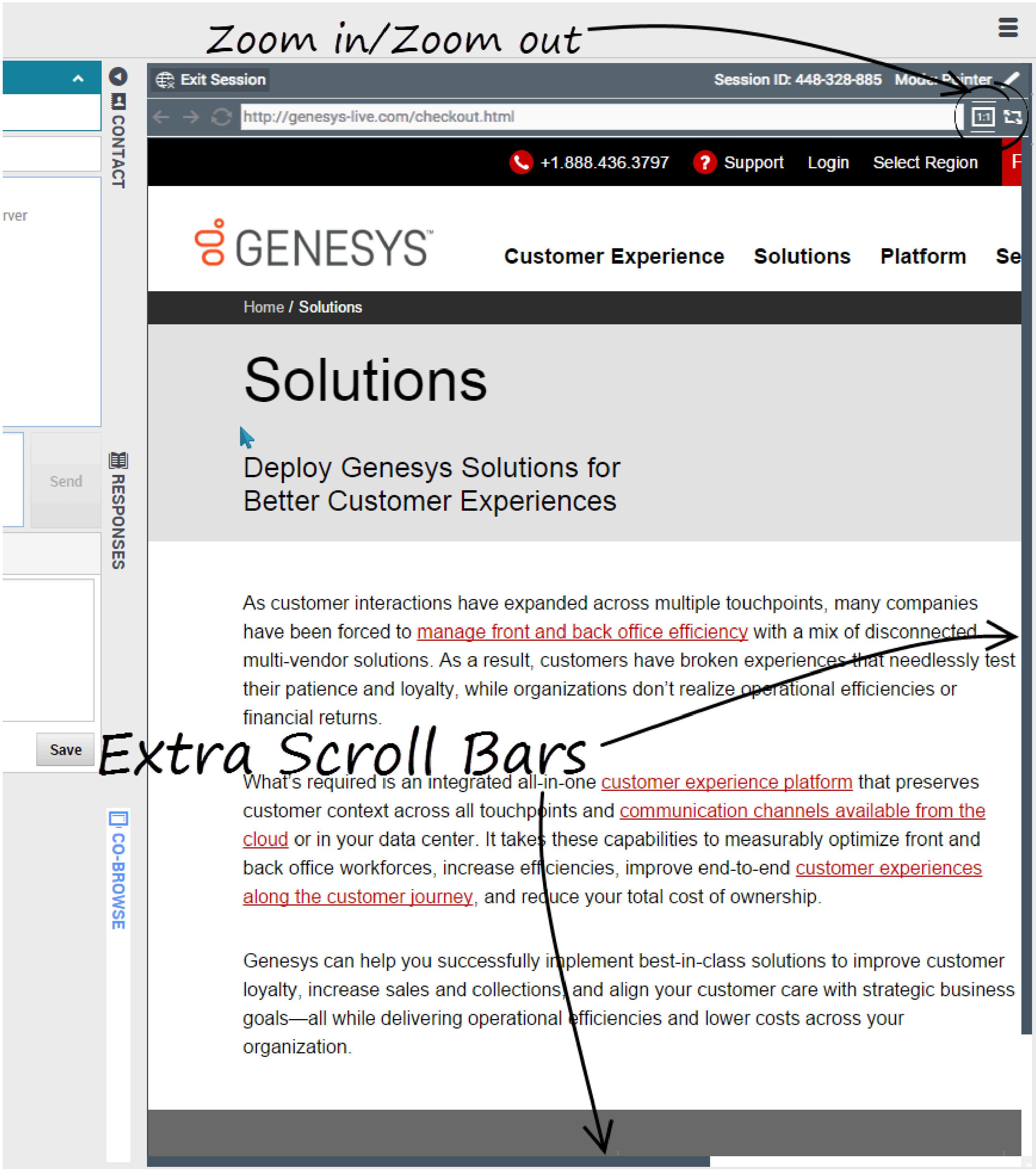
Stop a Co-browse session



Once a Co-browse session starts, both you and the customer have the ability to end the session with the **Exit Session** button. Ending your ongoing chat or call with the customer also immediately ends the Co-browsing session.

If the customer exits the session, you are notified and your browser no longer displays a view of the customer's browser. Likewise, if you exit the session, the customer receives a notification. Exiting the Co-browse session does not end your related chat or call with the customer.

Manage your virtual browser



The size of your virtual browser (a window on your computer that displays the customer's browser window) matches the actual size at the customer's end. Scroll bars appear to help you navigate the customer's browser if their window is bigger than your Agent Desktop Co-browse area. Or, you can use the zoom-to-fit button to scale the display to fit in your window.

Visibility of sensitive data

Administrators can limit which fields are readable to you; asterisks (****) display anywhere that characters are masked. For example, administrators might choose to mask only the customer's password and social security number—or an entire page—from all agents. Images can also be masked from you and will display as a grayed out area. Both masked fields and images are surrounded with a purple border.

At the same time, control for some elements, like buttons or links, can be disabled. These disabled elements are surrounded with a green border. By default, all **Submit** buttons are deactivated for agents. If you click on a **Submit** button, nothing happens. The customer always has permission to submit any web forms, just as they would while browsing normally.

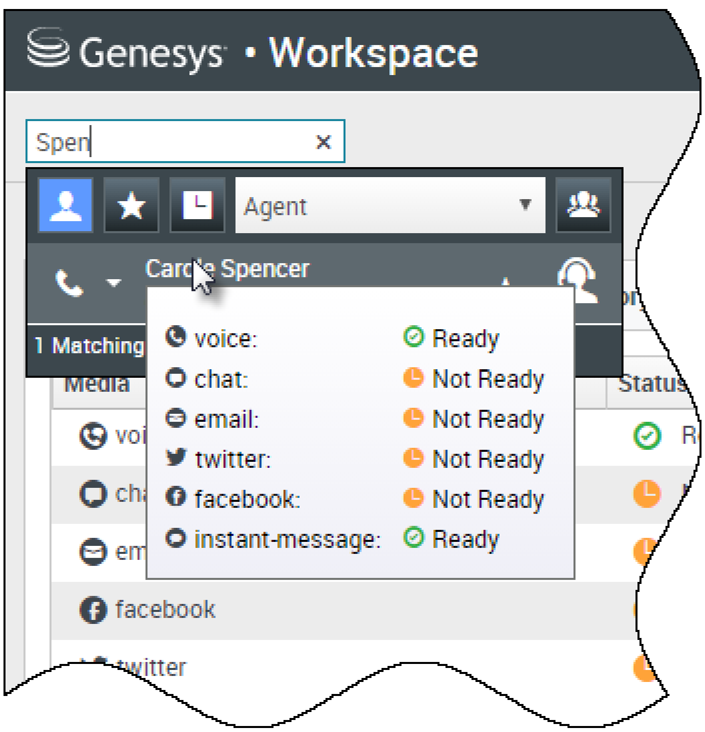
Internal interactions (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Internal interactions are communications between you and other people inside your company. They are typically internal-only, such as consultations, transfers, and messages from your system or administrators, but can also be conferences that involve the customer. Your supervisor might also use barge-ins or agent monitoring to listen silently or communicate with you and/or the customer.

How do I contact people in my company?

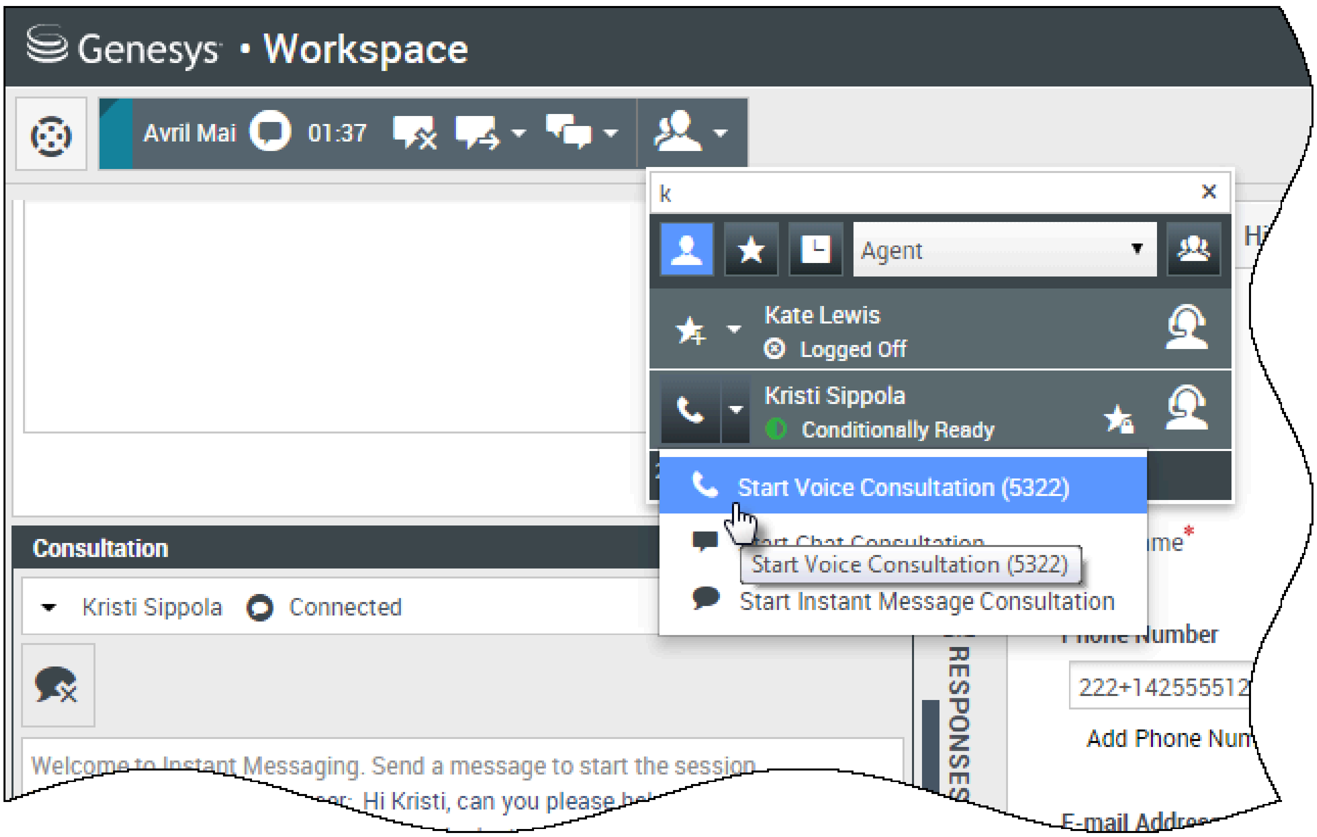


The Team Communicator tool lets you search through your company directory for an agent, team lead, agent group, or other target that you want to call, consult with, or transfer to.

Type in the name of the person that you want to call, then hover your mouse pointer over their name in the list of search results. A pop-up is displayed that lets you know whether that person is ready to take a call, is on a break, is busy, or is logged off.

If the person is available, use the action menu to call them. If not, try a different channel or try again later.

How do I start a consultation?



A consultation lets you discuss an active call, email, or chat with another team member. It's different from a conference because the customer is not connected to the session. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

 starts a consultation.

Search your list of team members to find the person or internal target (an agent group, a routing point, or a skill) you want to consult with and select the type of consultation you want. Once connected, you can monitor the status and use the controls as you would for any other interaction.

Some things to keep in mind:

- Either party can end the consultation, but ending the consultation does not end your interaction with the customer.
- If you end the session with the customer, the consultation remains active.
- Consultations are private — the customer can't see or hear your discussions.
- The team member can see the case and contact information and, if any, the chat transcript.
- To close an active chat, both you and the consulted team member must mark it done .

If you are on a call and start a voice consultation, the original call is put on hold while you consult with your selected team member.

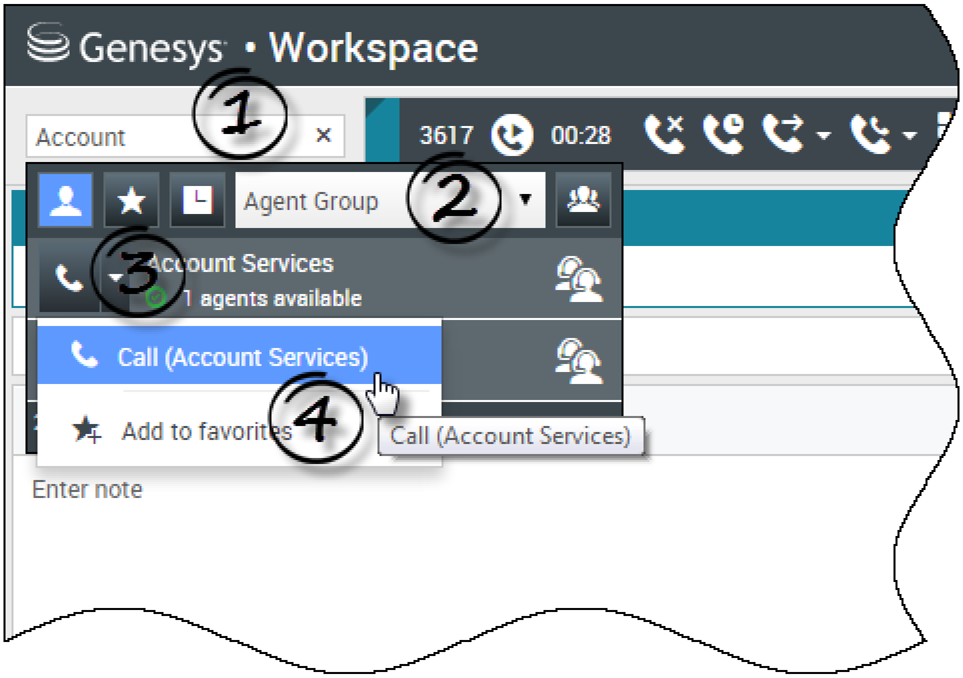
- resumes the original call (and also allows you to toggle between the two calls).
- ends the consultation and resumes the original call from hold.

If you start a chat, a new window opens where you can send private messages to the team member. You can also start multiple consultations. For example, you can start a voice consultation while a chat consultation is in progress.

Prior to a conference or transfer, you can consult with your team member by selecting **Consult** in the toolbar. After the consultation request is sent, the initial call is put on hold.

While in a consultation, you can also complete a conference or transfer between your team member and your customer. To do this, select **Instant Call Transfer** () or **Instant Call Conference** (), and select the same button beside the desired team member's name.

How do I call an Agent Group



In some contact centers, agents are assigned to specific groups. For example, some agents in a company might speak different languages, have particular product expertise, or have a higher level of security clearance. These are all specialties that might be associated with an agent's group.

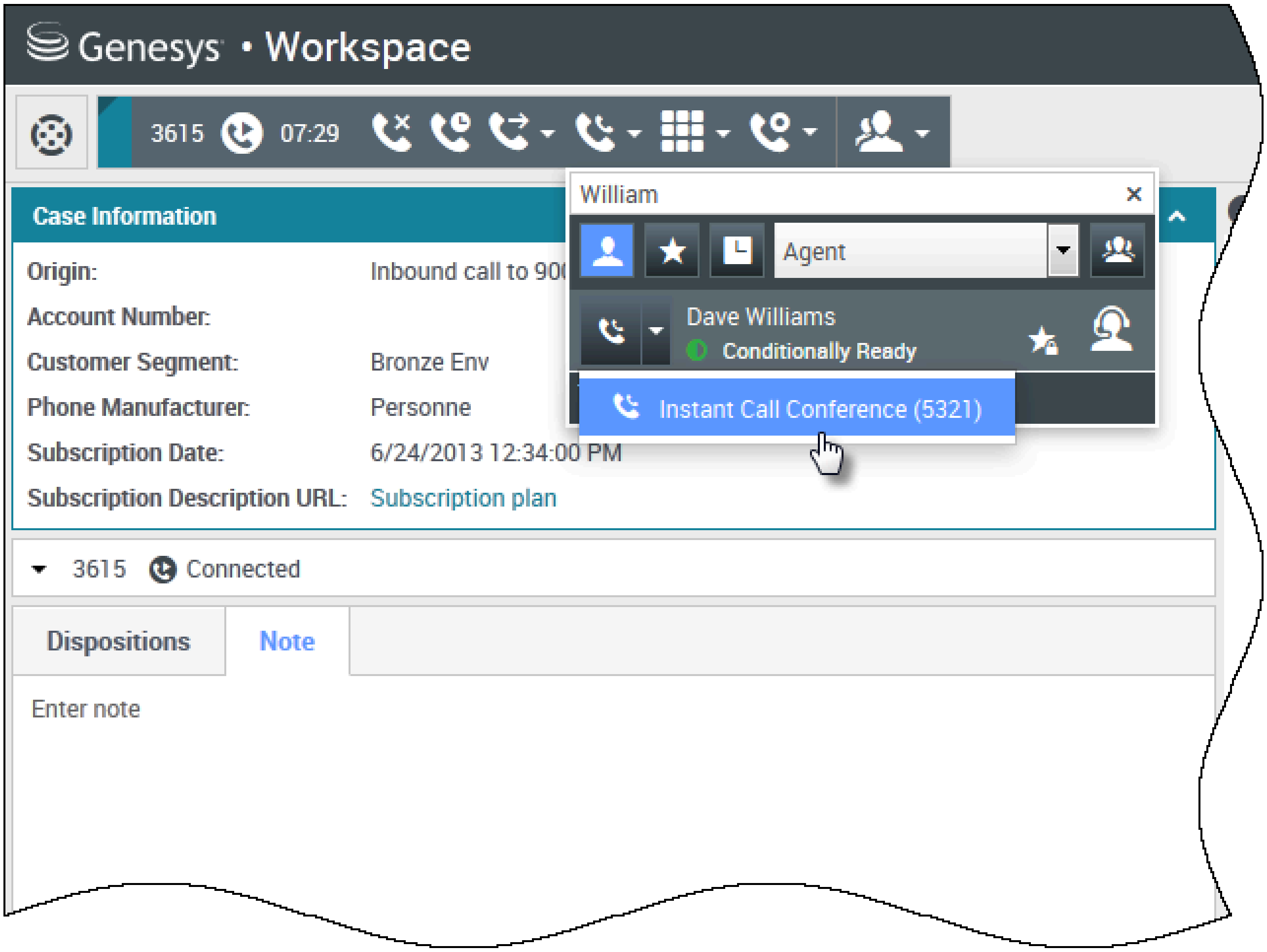
If your administrator has enabled this capability, you can enter the name of the agent group instead of the name of an agent when looking for a team member. Click the **Action Menu** drop-down list that is displayed next to the name of the agent group that you want to call.

Sometimes, no one in the agent group is available to take the call. If your administrator has set up Agent Desktop to display the number of available agents in the agent group, then you will see a message underneath the group name that tells you how many agents are available. If there are no agents available, you might have to wait to make the call.

Important

In some scenarios, the agent group availability information might be 10 to 30 seconds behind.

How do I start a conference?



Starting a conference allows you to add another person to your current call or chat. It's different from a consultation because the customer is also connected to the session.

 starts a conference when working in voice.

 starts a conference when working in chat.

Search your list of internal targets to find the person, agent group, routing point, interaction queue, or skill that you want to add and then select the conference channel you are requesting. The conference begins as soon as they accept the request. (When sending a conference request to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to see if an agent is available to join the conference.)

Some things to keep in mind:

- You can always consult with a team member before adding them to a conference.

- In a voice conference, the person you added can choose to release the call. This disconnects them from the conference, but your call with the customer continues.
- If you disconnect from the call but the person you added to the conference is still connected, the call continues without you. Your system might be set up to end the conference after you disconnect if the person that you added is not part of your company.
- Everyone connected to the conference can see or hear what the other parties are discussing, unless you remove or selectively mute a participant.
- Your account might be configured to remove a party from a conference. Select the **Party Action** menu on the Voice Interaction view and select **Drop from conference** to remove that party from the conference.

A team member can select **Leave** to drop from the conference.

How do I transfer an interaction to another team member?

Link to video

You can transfer a call, email, or chat to another team member instantly, or you can consult with them first. For example, you could put the current call on hold while you talk to another team member to see if they will accept the transfer.

 transfers a voice call.

 transfers a chat.

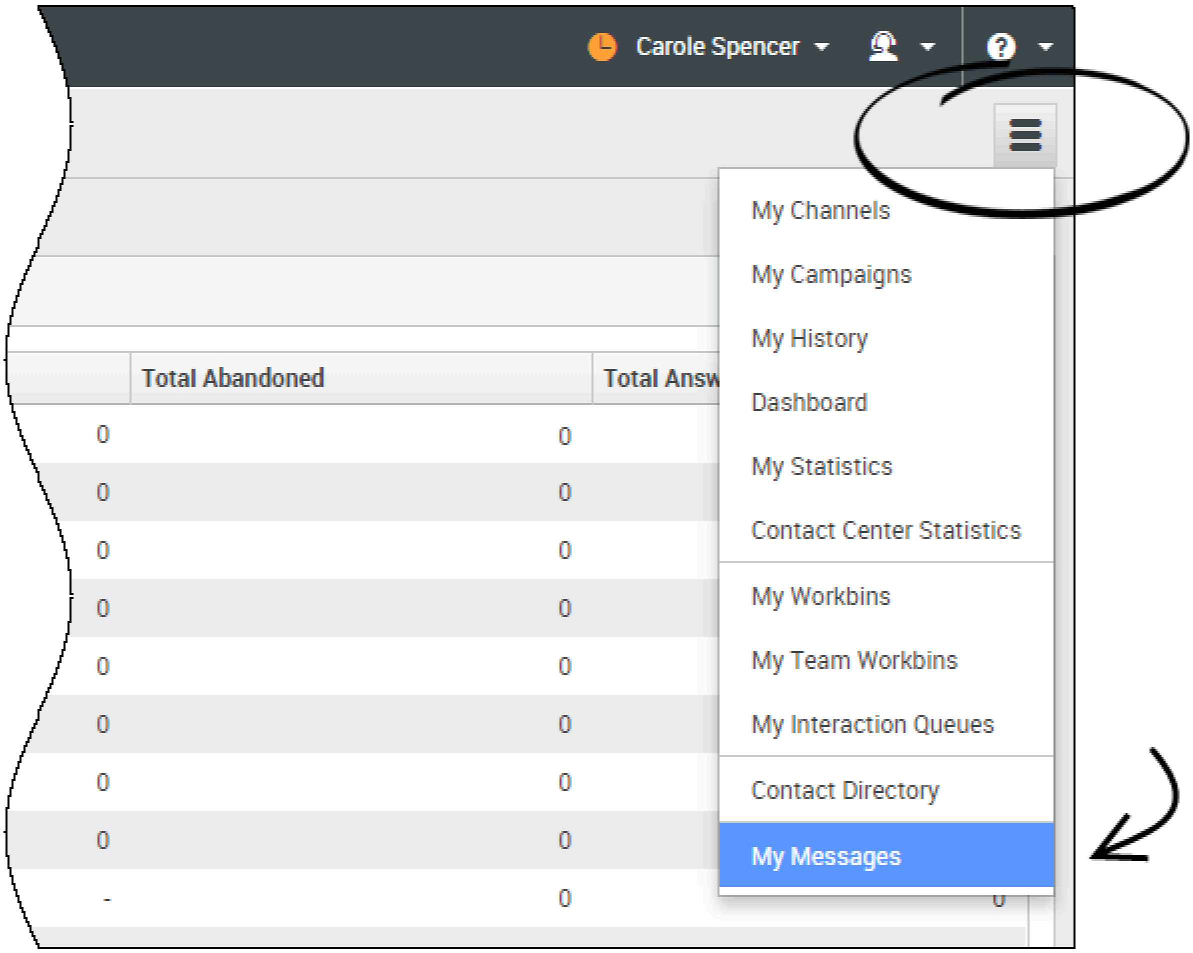
 transfers an inbound email.

Some things to keep in mind:

- Case information might be visible to you, the transfer recipient, or your administrator.
- If your transfer request is not accepted, you must manually take your contact off hold.
- If there are no agents available, you might have to wait to transfer the call. (When transferring to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to transfer if there are no agents showing as available.)

Watch the video to see how a transfer works.

How do I read my messages?



You might receive messages from the system or your administrator.

When a new message arrives, you'll see a preview notification (you might also hear a sound/tone play).

Common messages include:

- System-based messages (such as when a switch, channel, or contact server is out of service)
- Voicemails (if enabled)

You can view most messages on the **My Messages** page. In the Main View, click the **Access and use Agent Desktop supporting views** button (☰), then select **My Messages**. The most recent messages are displayed on top, with a color and a status to indicate the priority.

If you have voicemail messages, you'll see an indicator beside the mailbox, like this: 6.

To call your voicemail box select it from the **Supporting Views** menu (). A new internal interaction is launched. Use the keypad to enter your authentication information.

Tip: If you hover your mouse pointer over the message waiting indicator, you can see the number of messages in each of your voicemail boxes.

Outbound campaigns (v8)

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

As an agent, you might work on campaigns (for example, collections, telemarketing, or fundraising) where you make outbound calls to contacts. You can view and manage your campaigns from the **My Campaigns** tab.

What types of campaigns are available?

You might be working with one of the following campaign types:

- Preview campaigns, in which you manually request (or *pull*) a number to dial from the system.
- Progressive or Predictive campaigns, in which the system automatically sends you a number to dial.

Video Tutorial: Outbound Campaigns

Here are three tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, and the third demonstrates Preview (manual) campaigns.

- Overview

[+] Show video: Outbound Campaign Overview

Link to video

- Automatic record retrieval

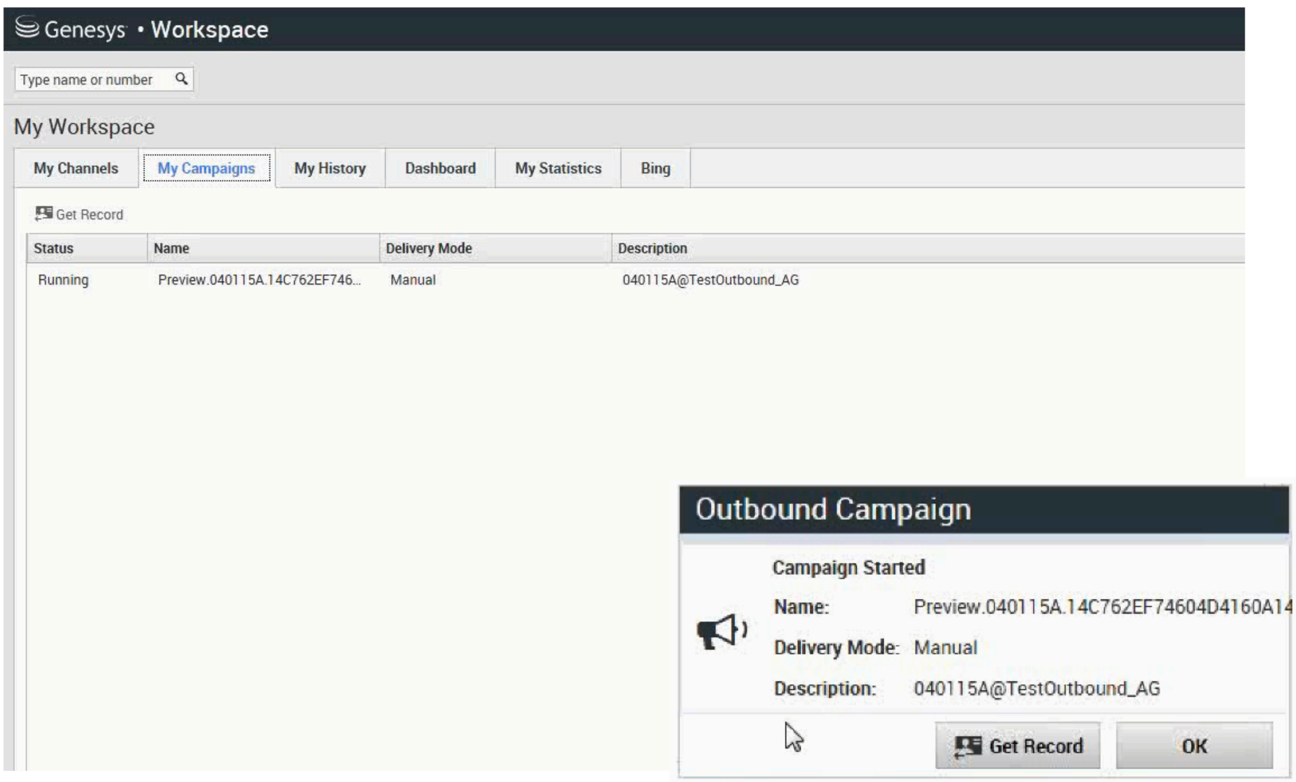
[+] Show video: Automatic Mode

Link to video

- Manual record retrieval

	[+] Show video: Manual Mode Link to video

How do I work with Preview campaigns?



In campaigns using Preview dialing mode, you request a record from the system and then dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to make calls.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, you can choose:

- **Get Record** to retrieve a contact record from the campaign list.
- **OK** to join the campaign. (With this option you'll have to retrieve a record manually. Go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.)

When you have previewed the record, use:

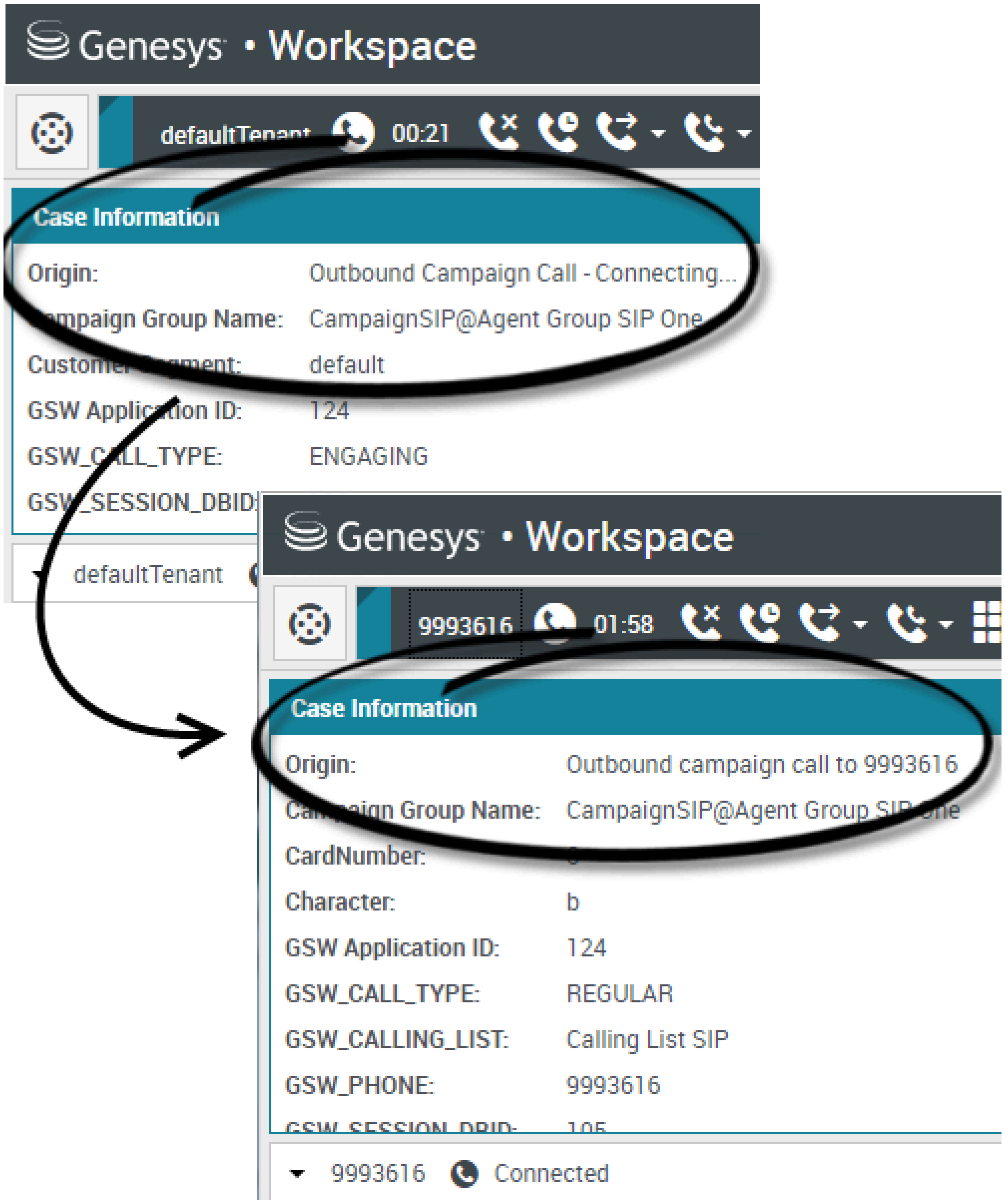
 to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

 to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

 to stop receiving previews (**Done and Stop**). To start receiving previews again, go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.

If asked, select the caller ID details you want to use.

How do I work with Progressive and Predictive campaigns?



In campaigns using Progressive and Predictive dialing modes, outbound calls are directed to your workstation and dialed automatically.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, click **OK** to join the campaign.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list.

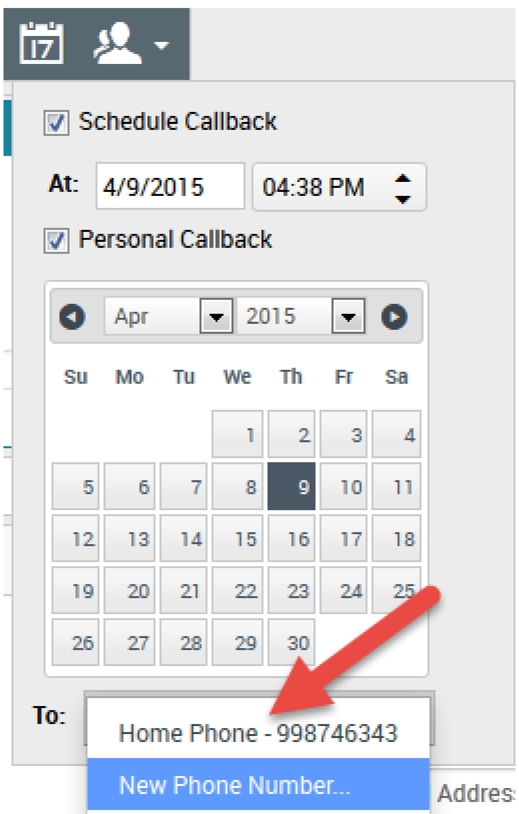
When you accept the call the contact or customer is not yet on the line. In the pop-up notification and in the call **Case Information** areas, you will see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`

As soon as the person answers the phone and the call is connected, the **Origin** of the call changes to `Outbound campaign call to <name or number of contact>`. Information about the call might be added to the **Case Information** area.

When you're connected to the contact, you can view the campaign call information, the Call Status, and the available Call Actions. Use the standard call controls to manage the call.

Note: In some environments, you might not be connected to the outbound call until after the contact has answered the phone. In this case, you will not see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`, instead it will immediately show you the name and or number of the contact.

How do I schedule callbacks for a campaign?



During a campaign, you might not be able to reach the contact or they might request to be called back at another specific date and time. You can schedule a callback at any time while you are handling an Outbound campaign call, even after the call has ended.

-  opens the **Schedule Callback** window, where you can set a date, time, and even a different phone number for the callback. You can also specify whether the callback is personal (you will handle the callback) or whether any available agent will handle the callback.

Tip: During Preview campaigns, you might be able to use this feature to postpone a preview call before the call is dialed.

When you've set the desired properties for the callback, the Schedule Callback button changes to  to indicate that a callback is scheduled. You can then end the call.

If you need to make changes to a scheduled call back, you can open the Schedule Callback window and make changes to the settings.

To cancel a scheduled callback, clear the **Schedule Callback** box. This must be done *before* closing the Outbound Record or the Interaction Preview.

When a rescheduled callback is directed to your workstation, an interaction preview is displayed as usual. The only difference is that the Case Information includes an indication in the **Origin** field that the call is a **Callback** or a **Personal Callback**.

Note: You might see an error message displayed in the Agent Desktop interface when you try to mark done an Outbound interaction that you have rescheduled. This can happen if the specified rescheduled date and time are invalid (for example, you might have set the rescheduled date and time in the past). You must fix any errors or cancel the reschedule first before you can mark the interaction done.

Supervising agents (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Some workers at contact centers are designated to be Team Leads or Supervisors. In this role, it is your responsibility to ensure that the agents that you supervise are successful.

The Supervisor Role

As a supervisor, your account might be set up to enable you to perform different tasks to manage and support your team, assist with interactions, manage in-progress interactions and queues.

Supervisor tasks include the following:

1. Monitor, Coach, and Barge-in

Agent Desktop enables you to monitor, coach, and/or barge-in to voice and/or chat interactions that are being handled by the agents that you supervise.

Depending on how your environment is set up, you might be set up to monitor individual agents or calls. If you are set up to monitor agents, then if an agent transfers a call, the monitoring of the call ends. If you are set up to monitor calls, then you continue to monitor the call as it moves through your company's system.

Overview

You can monitor their performance on voice calls and chat interactions, coach them on voice calls and chat interactions as part of their training or to help with a difficult-to-handle contact, or join (barge-in to) a voice call or chat interaction to help the contact directly.

You select which agent or agents to monitor by using the Team Communicator. You might also have the option of monitoring Interaction Queues (Routing Points); you select Routing Points by DN from Team Communicator.

Tip

- You can monitor only one agent at a time on the voice channel.
- You can monitor several agents simultaneously on the chat channel.
- If an agent that you want to monitor is logged in to both the voice and chat channels, you can monitor that agent on both channels.

When the agent whom you are monitoring accepts an interaction, an interaction notification is displayed on your desktop. If you accept the interaction, an interaction window is displayed on your desktop, and you are connected to the voice call or chat interaction.

If you are monitoring the agent, neither the agent nor the contact can hear you or are aware of your presence unless the agent's account is configured to notify the agent when he or she is being monitored (an icon is displayed in the Voice interaction window), or he or she might be configured to be monitored without his or her knowledge.

If you are coaching an agent during a voice call, the agent can hear you, but the contact cannot. If you are coaching an agent during a chat interaction, the agent can see your chat messages, but the contact cannot.

You can choose to join (barge-in to) a call or chat interaction.

Agent Desktop enables you to switch from certain team supervision modes to others.

2. Agent State

The **My Agents** dashboard lets you view and manage the state of the agents that you supervise. You can log out agents or change their status to Ready or Not Ready.

Overview

A common thing for agents to do is to forget to logoff of media channels at the end of the day or when they are on an extended not ready state, for example for meetings or lunch. If your agent accounts are set to auto answer calls, this behavior can result in interactions being accepted by an agent's unattended workstation. You can monitor the states of all the agents that you supervise and change them to ensure the best customer experience. You can log agents off globally from all logged on channels.

Agents might also forget to change their state to Ready or to Not Ready. The **My Agents** view lets you view and change agent state for each channel.

3. Email QA Review

Agent Desktop enables you to review outbound email interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound email interactions are directed to you before being sent to a customer. As a reviewer, your account might be set up to direct outbound email interactions to you, or you might have to retrieve outbound email interactions from a workbin.

4. Workbin and Queue Management

You can open, mark done, delete, and move in-progress interactions that are stored in the workbins of your team members and in interaction queues that you manage.

How do I monitor my agents?

When you monitor a selected agent who is in the group of agents that you supervise, an interaction preview window tells you that the selected agent is handling a voice or chat interaction. You can monitor the next interaction of an agent. Your account might also be set up to let you monitor the current voice interaction of an agent.

You can start monitoring an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Monitor Agent** ().

You can end monitoring an agent by using the Team Communicator and selecting **Stop Monitoring** in the **Action Menu** ().

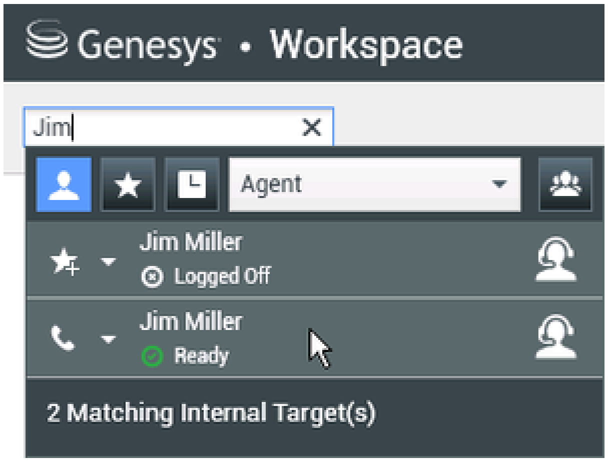
You can stop monitoring the current interaction by clicking **End Monitoring** () in the Call Actions toolbar in the interaction window.

Monitoring a Voice Interaction

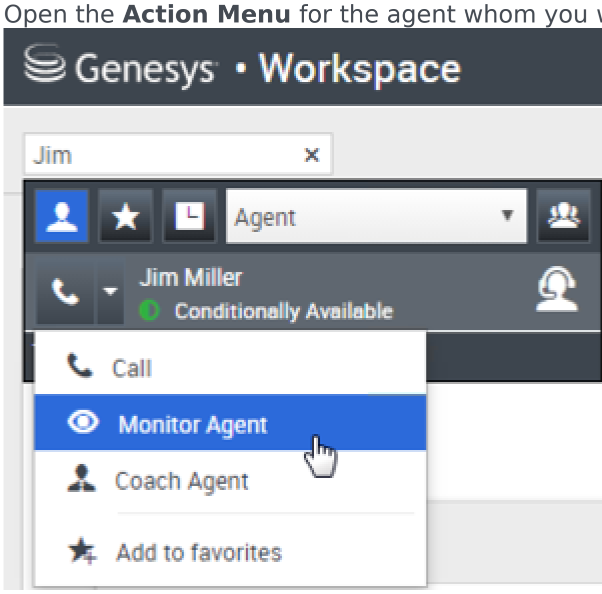
Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next voice interaction of an agent.

> **Tip**
> You can monitor only one voice agent at a time.

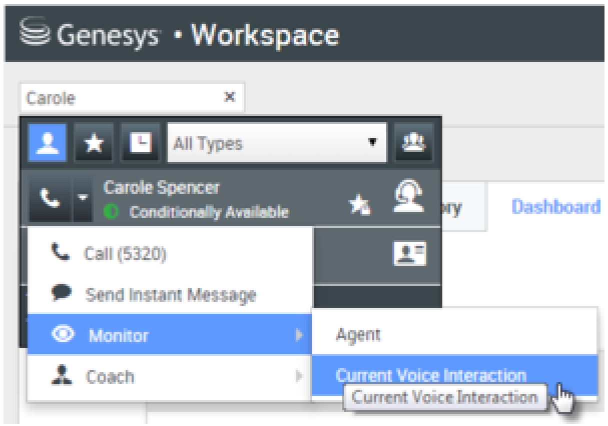
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor or to find a Routing Point.



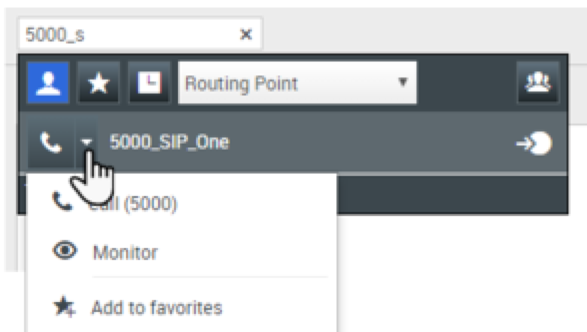
2. Open the **Action Menu** for the agent whom you want to monitor and select **Monitor Agent**.



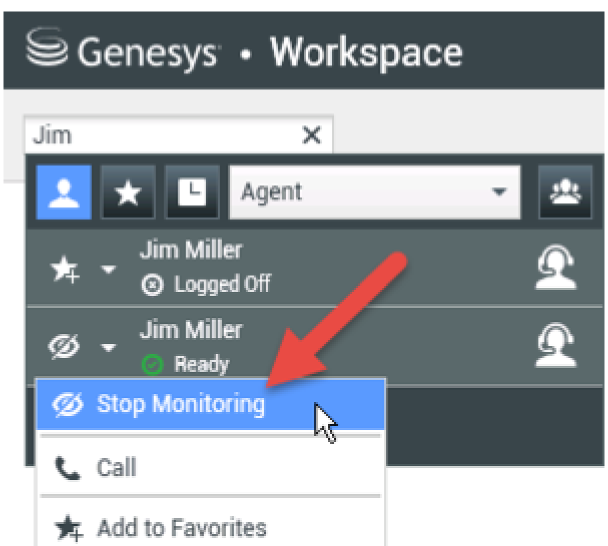
Or, to monitor the next interaction if your account is set up to let you monitor the current or next interaction, open the **Action Menu** for the agent whom you want to monitor and select **Monitor**, then select **Agent**. To monitor the current interaction (if your account is set up for this feature), open the **Action Menu** for the agent whom you want to monitor and select **Monitor**, then select **Current Voice Interactions**.



Or, to monitor calls on a Routing Point if your account is set up to let you monitor the next interaction on a Routing Point, open the **Action Menu** for the Routing Point that you want to monitor and select **Monitor**.

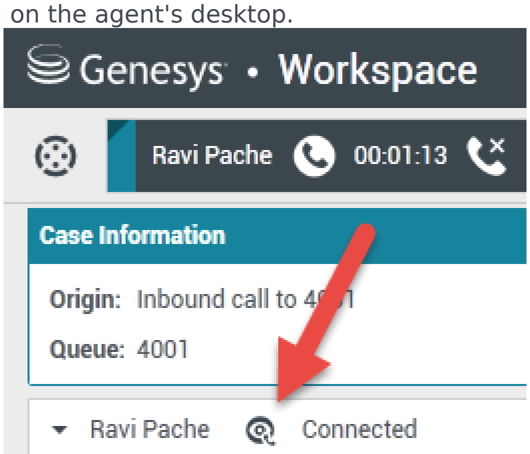


A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent (or Routing Point) whom you are monitoring changes to the **Stop Monitoring** button.

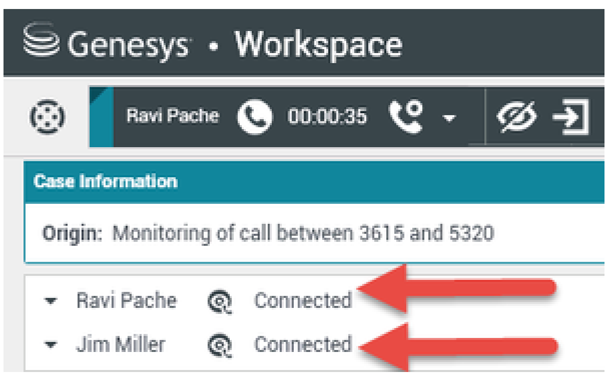


3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on

your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties.
If you do not click **Accept**, the notification will be dismissed automatically.
If the agent is already handling an interaction when you start monitoring, you will have to wait for the next interaction to start monitoring.
If the account of the monitored agent is configured so that the agent is notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party **Action** menu.



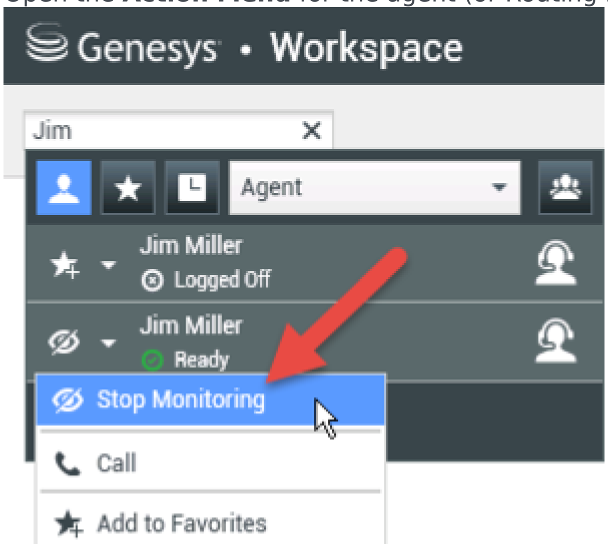
4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
   - Barge-in—Click **Barge-in** () in the Supervisor controls of the **Call Actions** toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking **End the Call** () in the **Call Actions** toolbar.

   If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.
   If the agent ends the call while you are still monitoring the agent, the monitoring session ends automatically.

5. Click **Done** to close the Voice Interaction Monitoring window and mark the interaction as **Done**.

6. To stop monitoring the agent, use the Team Communicator to find the agent (or Routing Point) whom you are monitoring.
7. Open the **Action Menu** for the agent (or Routing Point), and select **Stop Monitoring**.

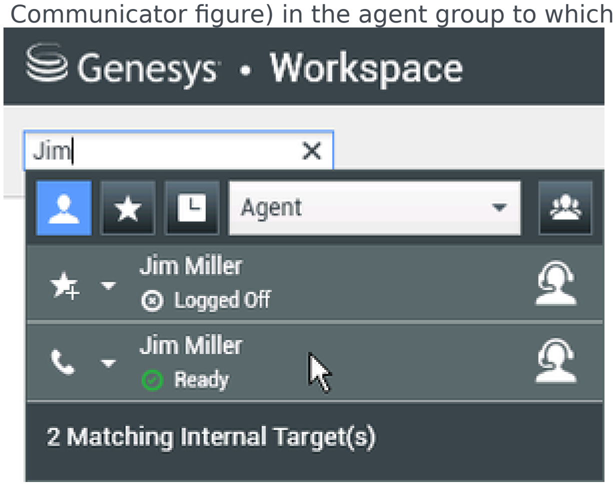


A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

Monitoring a Chat Interaction

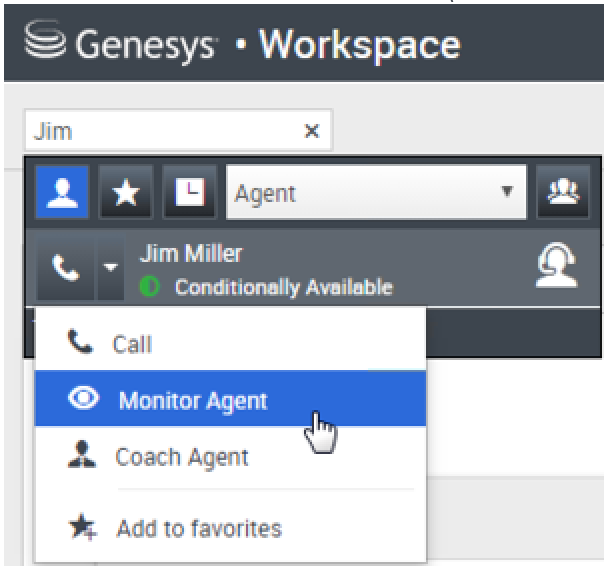
Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agent accounts can be configured to notify agents when they are being monitored. You can monitor the next interaction of an agent.

1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.

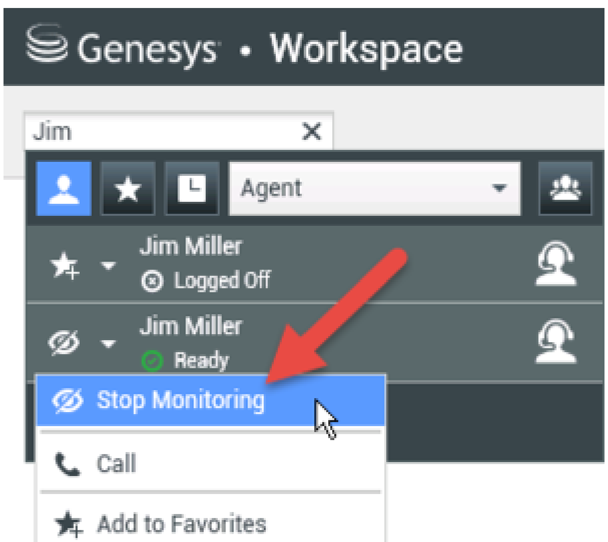


2. To monitor the next interaction, open the **Action Menu** for the agent whom you want to monitor and

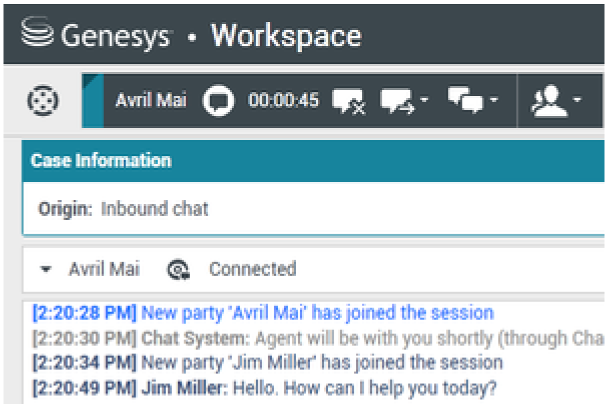
select **Monitor Next Interactions** (see the Internal Target Action Menu figure).



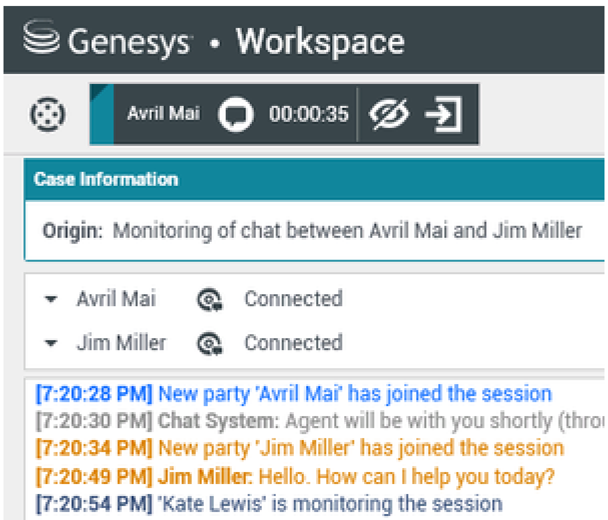
A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the **Action Menu** for the agent whom you are monitoring changes to the **Stop Monitoring** button.



3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent.
If you do not click **Accept**, the notification will be dismissed automatically.
If the agent is already handling an interaction when you start monitoring, you will have to wait for the next interaction to start monitoring.



The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party **Action** menu.

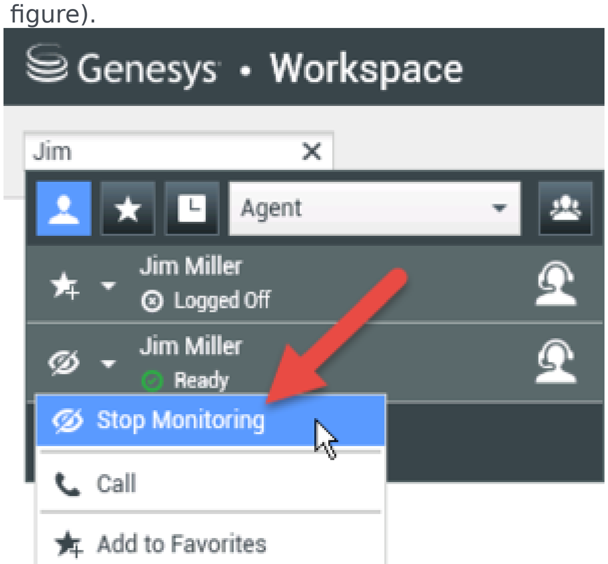


4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
   - Barge-in—Click **Barge-in** () in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking **End Chat** () in the **Call Actions** toolbar.
   - Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. A voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.
   - Coach via chat—Select **Coach via Chat** from the agent party **Action** menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent.
     If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.

If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.

5. Click **Done** to close the Chat Interaction Monitoring window and mark the interaction as **Done**.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the **Action Menu** for the agent and select **Stop Monitoring** (see the Internal Target Action Menu figure).



A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

How do I coach my agents?

When you coach a selected agent who is in the group that you supervise, an interaction preview window tells you that the selected agent is handling a voice or chat interaction.

You can start coaching an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Coach Agent** (). Your account might also be set up to let you coach the current voice interaction of an agent.

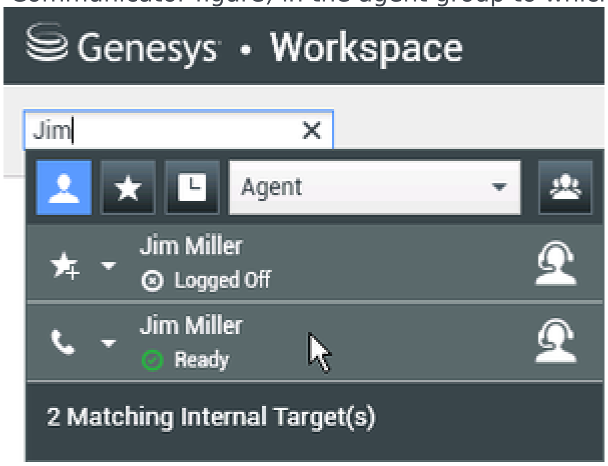
You can end coaching an agent by using the Team Communicator and selecting **Stop Coaching** from the **Action Menu** ().

You can end coaching the current interaction by selecting **End Coaching** () in the Call Actions toolbar in the interaction window.

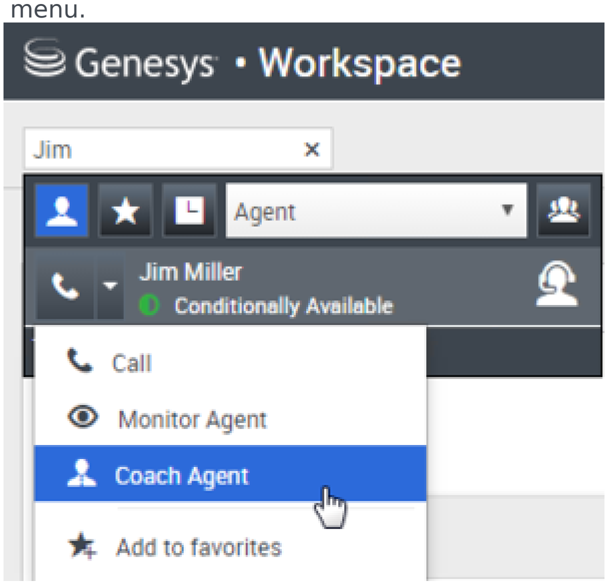
Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next voice interaction of an agent.

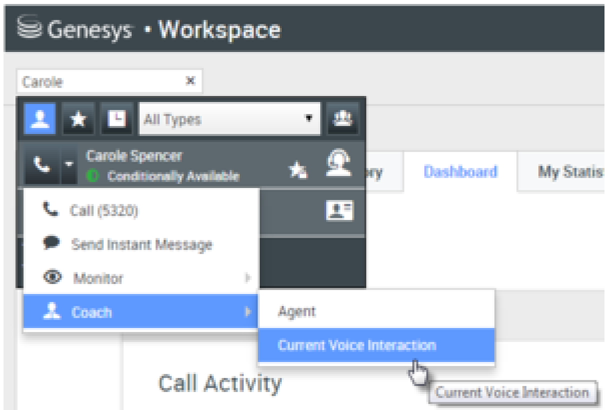
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



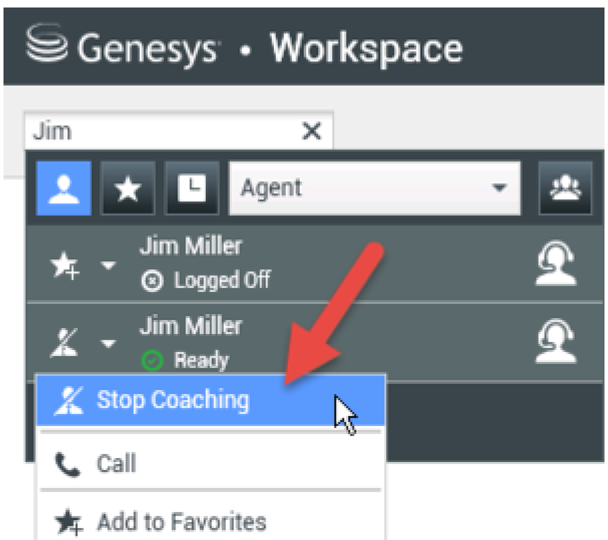
2. Open the **Action Menu** for the agent whom you want to coach and select **Coach Agent** (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the **Coach** menu.



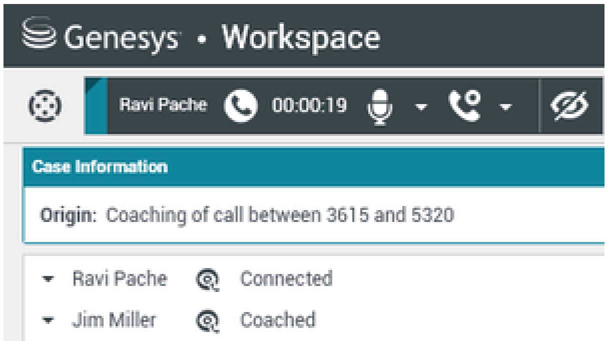
Or, to coach the next voice interaction if your account is set up to let you coach the current or next voice interaction, open the **Action Menu** for the agent whom you want to coach and select **Coach**, then select **Agent**. To coach the current interaction (if your account is set up for this feature), open the **Action Menu** for the agent whom you want to coach and select **Coach**, then select **Current Voice Interactions**.



A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.



3. When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent.
If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.
If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click **Accept**, you will begin coaching the call that is already in progress.
The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party **Action** menu.

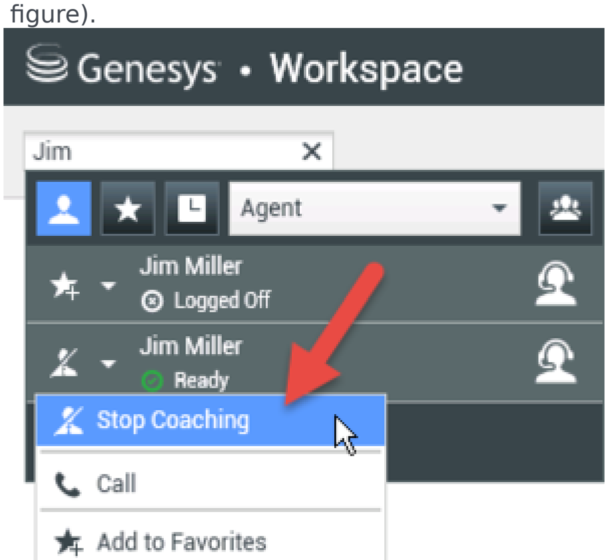


4. During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.

   If you stopped coaching, you are disconnected from the call.
   If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click **Done** to close the Voice Interaction Coaching window and mark the interaction as **Done**.
6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching** (see the Internal Target Action Menu figure).

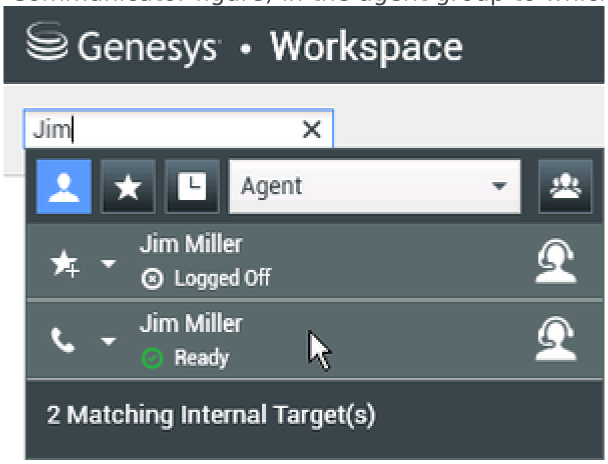


   A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

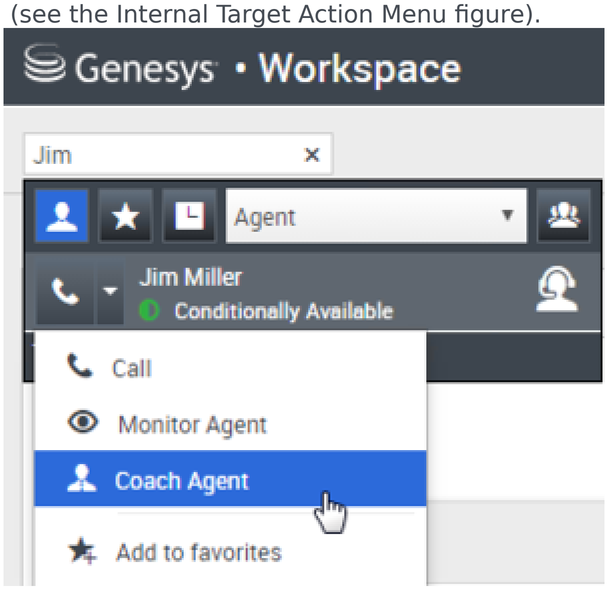
Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the next chat interaction of an agent.

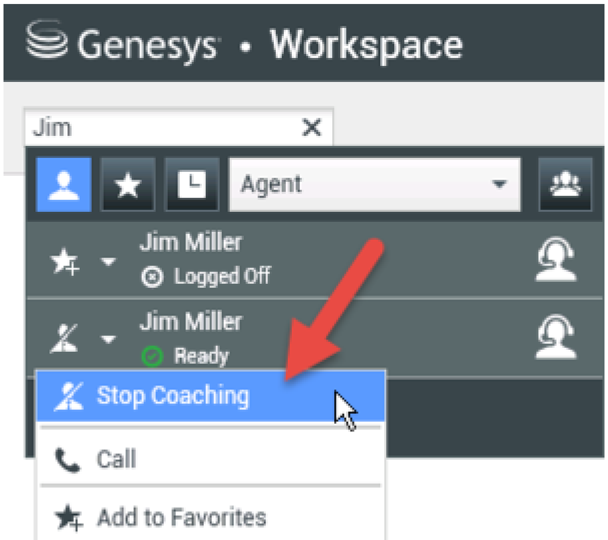
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



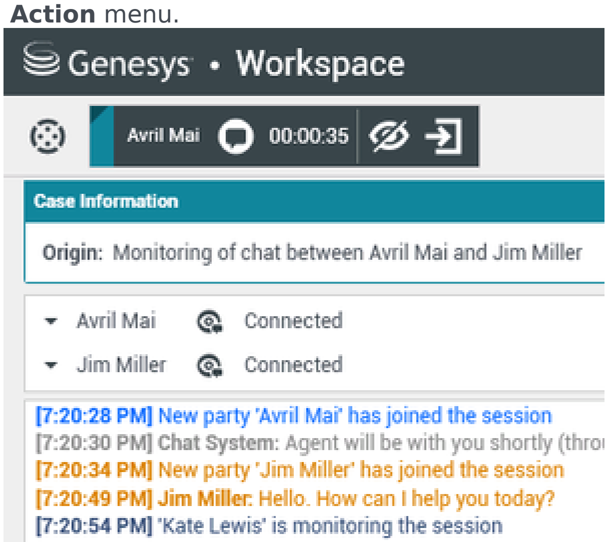
2. Open the **Action Menu** for the agent whom you want to coach and select **Coach next interactions** (see the Internal Target Action Menu figure).



A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.



3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages.
If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.
If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click **Accept**, you will begin coaching the chat session that is already in progress.
The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party **Action** menu.



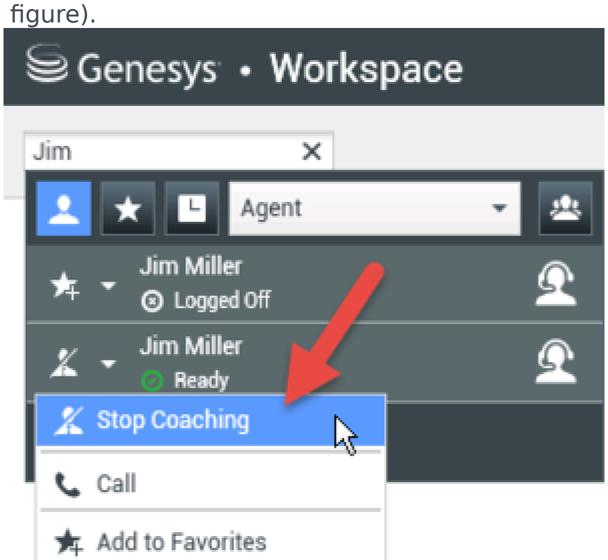
4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.

- Barge-in—Click **Barge-in** () in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.
  Click **Done** to close the coaching session in the window and mark the coaching interaction as **Done**. You can switch to monitoring the chat session (see *Monitoring a Chat Interaction* in the **Monitor** tab) by clicking **End Chat** () in the **Call Actions** toolbar.
- Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.

If you stopped coaching, you are disconnected from the chat session.
If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click **Done** to close the Chat Interaction Coaching window and mark the interaction as **Done**.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching** (see the Internal Target Action Menu figure).



A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

How do I Barge-in on my agent's call?

When you barge-in (join) to an active interaction, you must already be monitoring the interaction.

To barge-in to an active interaction that you are monitoring, click **Barge-in** () in the Supervision toolbar. **Barge-in** is a simple button if you are supervising a single channel interaction (voice or chat).

How do I switch my Agent Monitoring Mode?

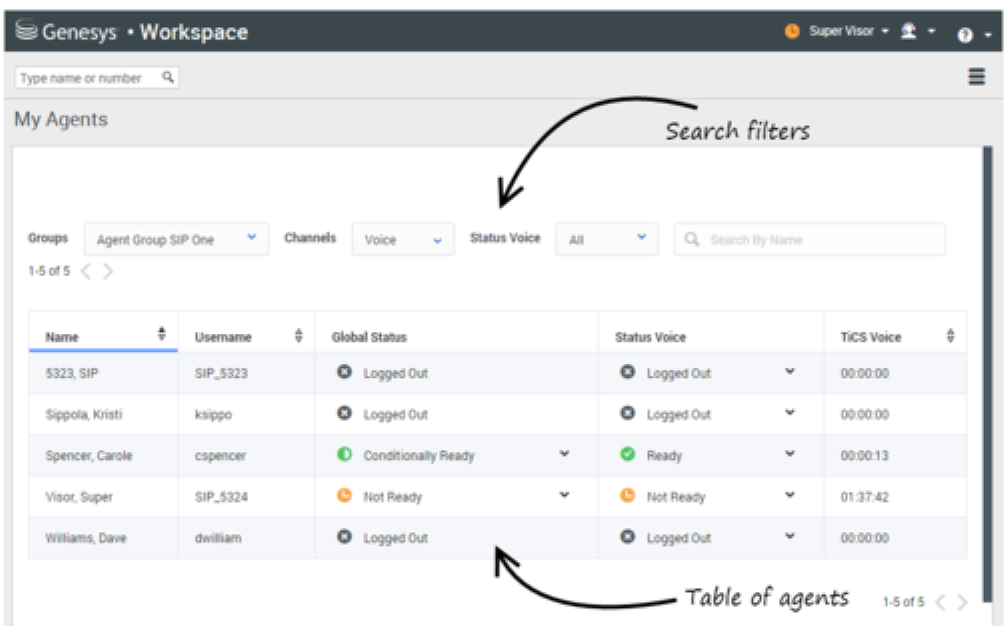
Agent Desktop enables you to switch from certain supervision modes to others. During the monitoring, coaching, or barge-in of an interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to barge-in—Click **Barge-in** ( ) in the `Supervision` bar.
- Coaching to barge-in (chat only)—Click **Barge-in** (in the `Supervision` bar.
- Coaching to monitoring (chat only)—Click **End Chat** ( ).
- Barge-in to monitoring—Click **End Call** ( ) or **End Chat** ( ) in the Interaction toolbar to return to monitoring.
- Use **End Monitoring** ( ) in the Interaction toolbar to end monitoring.

How do I manage the State of my agents?

The **My Agents** view lets you view and control the ready state and logged in state of all of the agents that you manage.

Open **My Agents** from the Supporting Views menu.



This view has two parts, the filters and the table of agents. Use the filters to find agents by **Group**, **Channel**, **Status**, and first and/or last name.

In the table of agents, click a status to change it, for example from **Ready** to **Not Ready**. To set an agent to Ready or Not Ready on more than one channel, you must manage each channel separately.

To log an agent out of all channels, select **Log Out** from the **Global Status** column.

If an agent is Ready on one or more channels, but in a different state on one or more other channels, their global status displays as **Conditionally Ready**.

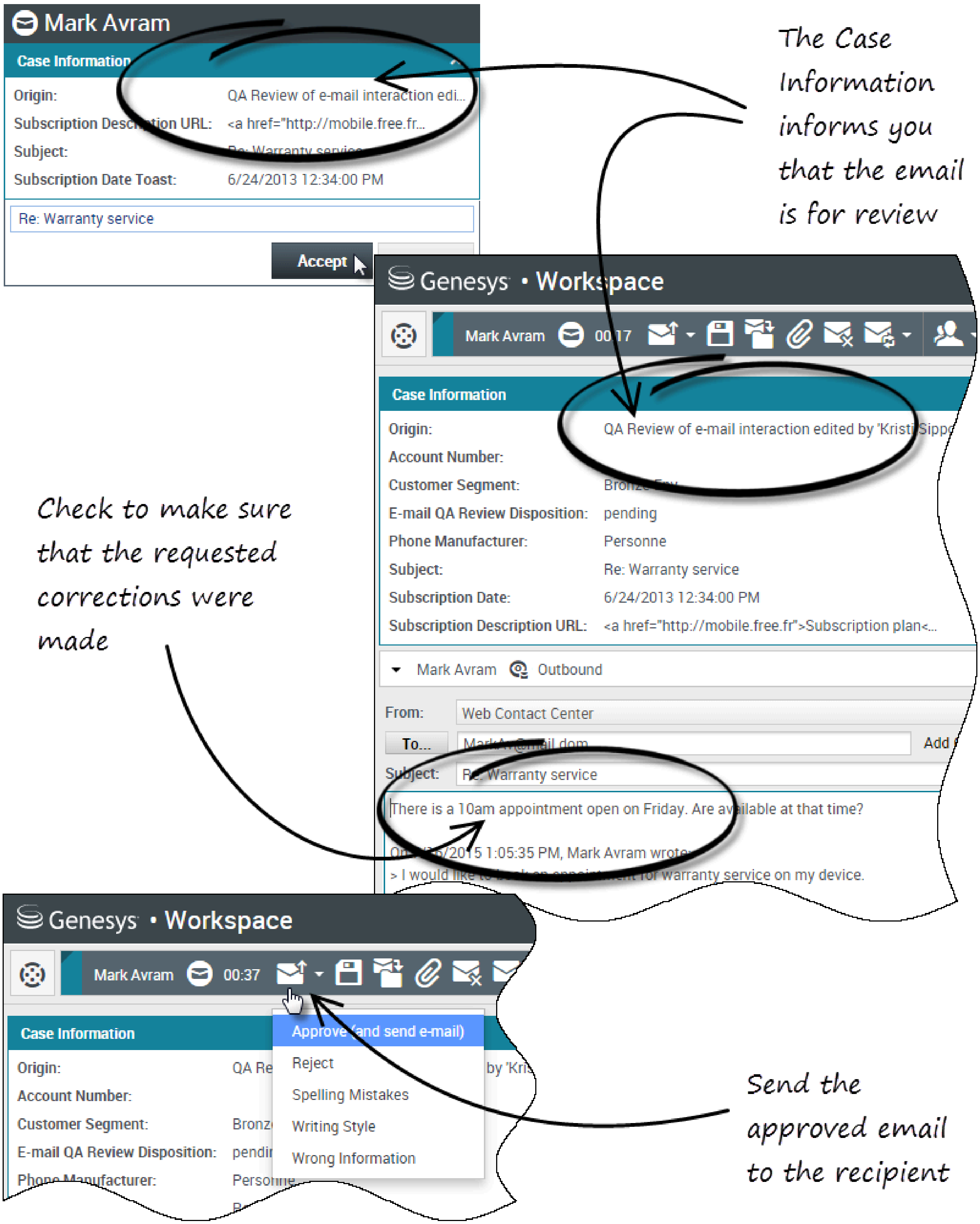
How do I review an outbound email?


Mark Avram
Case Information
Origin:
QA Review of e-mail interaction edi...
Subscription Description URL:
<a href="http://mobile.free.fr...
Subject:
Subscription Date Toast:
6/24/2013 12:34:00 PM
Re: Warranty service
Accept
Reject
The Case Information informs you that the email is for review
Genesys • Workspace
Mark Avram
01:48
Case Information
Origin:
QA Review of e-mail interaction edited by 'Kristi Sippola'
Account Number:
Customer Segment:
E-mail QA Review Disposition:
pending
Dispositions
Note
Use a Disposition, the Note tab, or the Send icon to provide feedback about rejected emails
Send a rejected email back to an agent to be corrected
Genesys • Workspace
Mark Avram
03:05
> M. Avram
Approve (and send e-mail)
Reject
Spelling Mistakes
Writing Style
Wrong Information

Outbound emails are directed to reviewers before they are sent to a contact. In this example, there is problem with the email and it must be returned to the agent to be fixed.

1. When an email interaction for review is directed to you, an interaction preview window opens. The Case Information indicate that the email is for QA review. In this example, the "Origin" field contains the text: "QA Review of email interaction...". Click **Accept** to display the interaction. The email interaction is displayed on your desktop.
    - The Case Information view might be set up to provide you with information about who wrote the email.
    - The Email Review icon () is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.
2. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix. Depending on the policy at your company, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent, or you might discuss the content with the agent verbally. Other actions available to you include:
    - Save changes that you made to the email interaction
    - Move the email to a workbin to save the email in your draft email workbin to process later
    - Attach a file to the email
    - Delete the email
    - Start a consultation
3. Email interactions that are sent to you for review have a drop-down menu on the Send button. The contents of this menu are set up by your administrator and so might be different than in this example. Click to open the menu. Since a problem was found this email is being returned to the agent to fix. In this example, the administrator has set up different Reject Reasons which will be included in the Case Information when the interaction is returned to the agent. Clicke of the "Reject" options to send the email back to the original agent.
4. Now you're ready to approve the email.

How do I approve a fixed outbound email?


Mark Avram
Case Information
Origin: QA Review of e-mail interaction edi...
Subscription Description URL: <a href="http://mobile.free.fr...
Subject:
Subscription Date Toast: 6/24/2013 12:34:00 PM
Re: Warranty service
Accept
The Case Information informs you that the email is for review
Genesys • Workspace
Mark Avram 00:17
Case Information
Origin: QA Review of e-mail interaction edited by 'Kristi Sippo
Account Number:
Customer Segment:
E-mail QA Review Disposition: pending
Phone Manufacturer: Personne
Subject: Re: Warranty service
Subscription Date: 6/24/2013 12:34:00 PM
Subscription Description URL: <a href="http://mobile.free.fr">Subscription plan<...
Mark Avram Outbound
From: Web Contact Center
To...
Subject: Re: Warranty service
There is a 10am appointment open on Friday. Are available at that time?
Check to make sure that the requested corrections were made
Genesys • Workspace
Mark Avram 00:37
Case Information
Origin:
Account Number:
Customer Segment:
E-mail QA Review Disposition:
Phone Manufacturer:
Approve (and send e-mail)
Reject
Spelling Mistakes
Writing Style
Wrong Information
Send the approved email to the recipient

If you are a reviewer, outbound emails are directed to you before they are sent to a contact. In this example, the agent has fixed an earlier identified problem, and the email is directed to you to review.

1. When an email interaction for review is directed to you, an interaction preview is displayed on your desktop. The Case Information will indicate that the email is for QA review. In this example, the "Origin" field contains the text: "QA Review of email interaction...". Click **Accept** to display the interaction. The email interaction is displayed on your desktop.
   - The Case Information view might be set up to provide you with information about who wrote the email.
   - The Email Review icon () is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.
2. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix.
3. Assuming that the email is now okay to send to the contact, click the Send icon to open the menu. Since the email is now ready to send to the contact, select the option that represents Accept. In this example, the administrator has added the **Approve (and send email)** option to the menu.

How do I use the My Team Workbins?

You can perform the following functions on selected interactions in workbins by using the **Workbin Actions** buttons (the available actions depend on the type of interaction that you have selected):

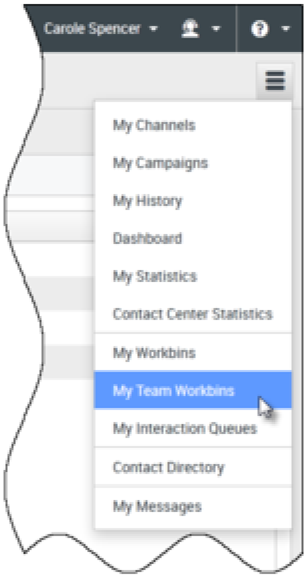
- **Open**
- **Mark Done**
- **Delete** — if you have the correct permissions
- **Move to Queue** — if you have the correct permissions
- **Move to Workbin** — if you have the correct permissions
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

You can also control-click and/or shift-click items in a workbin to select more than one item. With multiple items selected you can move them to a queue, move them to another workbin, mark them as **Done**, or update the case information for all of them in the Case Data tab.

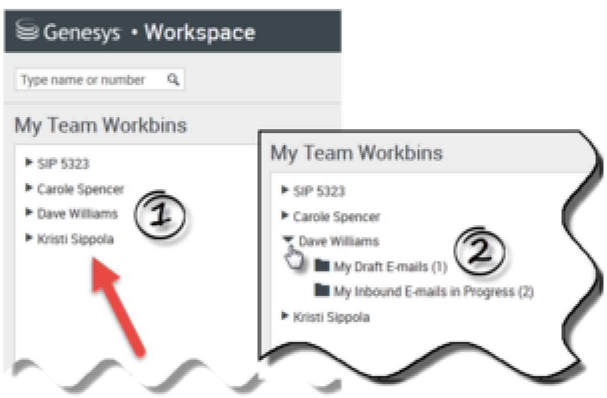
Link to video

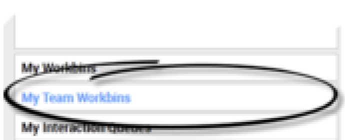
Accessing and Using My Team Workbins

Choose **My Team Workbins** from the **Supporting Views** menu.



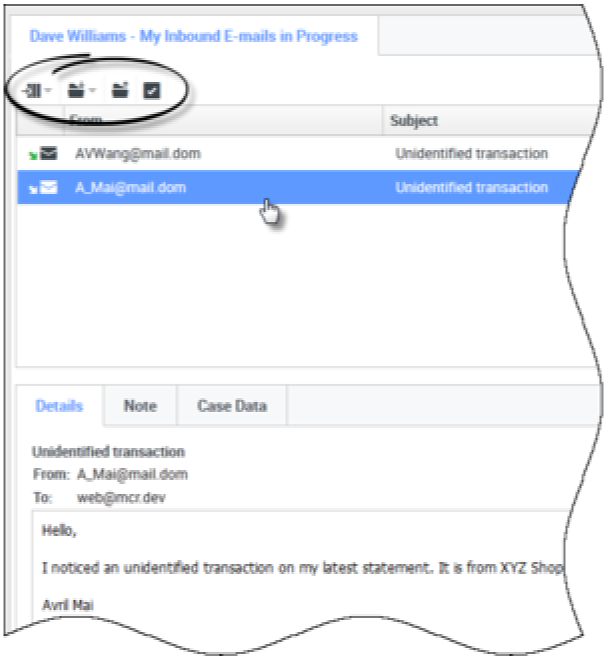
The **My Team Workbins** view contains an expandable list of all of the agents that you supervise who have workbins. If you click the agent name or the arrow next to the name of one of your agents the view expands to show you the workbins for that agent and the number of interactions stored in each.





To view and manage the interactions that are stored in the agent's workbin, click the name of the workbin. The list of interactions stored in the workbin is displayed for you in the panel to the right of the workbin list.

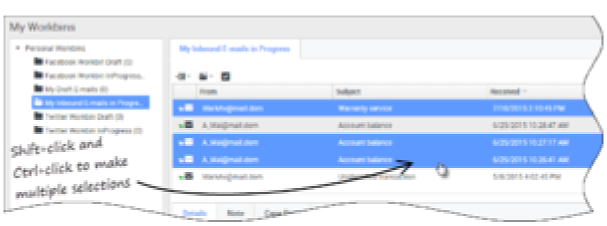
When you select an interaction in a workbin or an Interaction Queue, the contents, notes, and case data are displayed in tabs at the bottom of the Workbin view. Controls are displayed at the top of the Workbin view that let you perform actions on the interaction that you selected.



The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected:

- **Open**
- **Mark Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

You can Ctrl-click and/or Shift-click items in a workbins to select more than one item. With multiple items selected you can move them to a Queue, move them to another Workbin, mark them as **Done**, or update the Case Information for all of them in the Case Data tab.



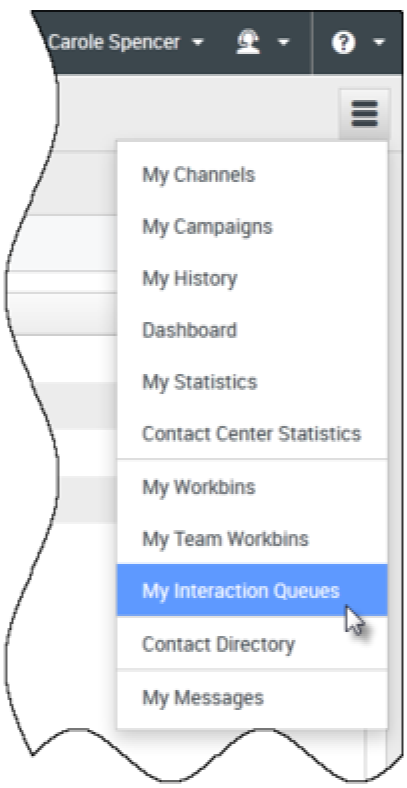
How do I manage My Interaction Queues?

You can perform the following functions on selected interactions in interaction queues by using the **Interaction Queues Actions** buttons (the available actions depend on the type of interaction that you have selected):

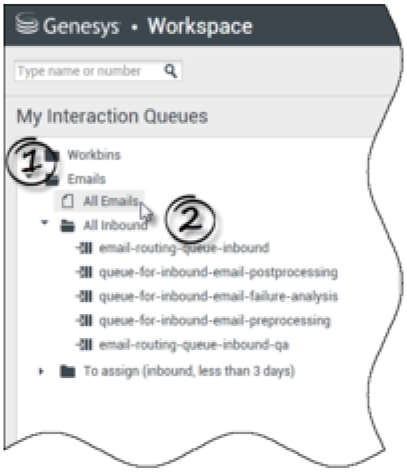
- **Open** — opens the selected interaction in the Agent Desktop interaction view.
- **Mark Done** — marks the interaction as Done and move it from the queue.
- **Delete** — deletes the selected interaction
- **Move to Queue** — moves the interaction to a different interaction queue
- **Move to Workbin** — moves the interaction to one of the queues of one of the agents that you supervise, or to one of your own workbins
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

Accessing and Using Interaction Queues

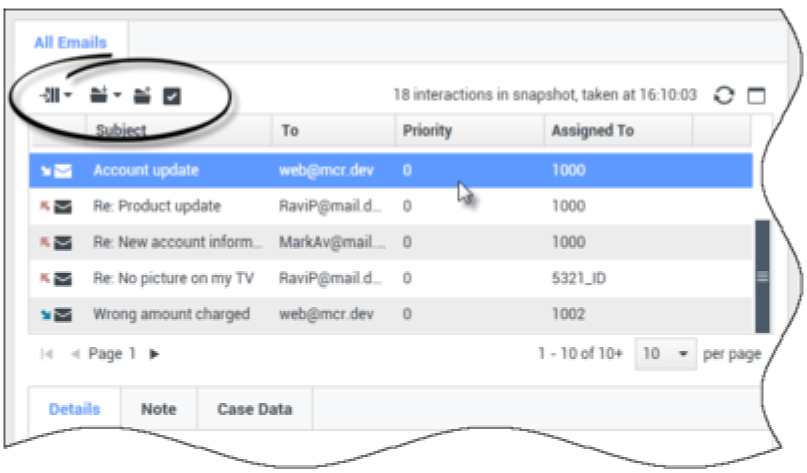
Choose **My Interaction Queues** from the **Supporting Views** menu.



The **My Interaction Queues** view contains an expandable list of all of the interaction queues that your account is set up to manage. Interaction queues might be grouped by type in folders. If you click the folder name or the arrow next to the name of the folders, the view expands to show you the queues in that folder. Click a queue to view its contents. The list of interactions stored in the queue are displayed for you in the panel to the right of the queue list.



When you select an interaction in an interaction queue, the contents, notes, and case data are displayed in tabs at the bottom of the interaction queue list view. Controls are displayed at the top of the interaction queue view that let you perform actions on the interaction that you selected.

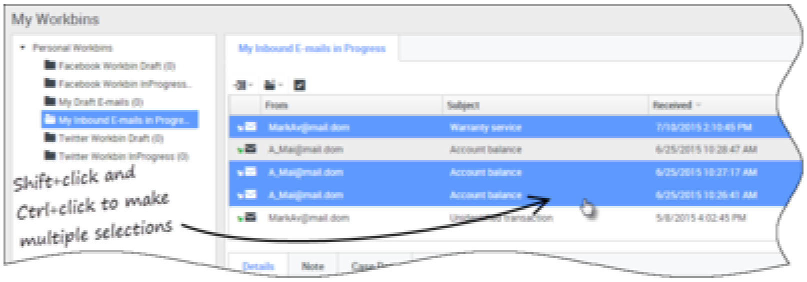


The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected:

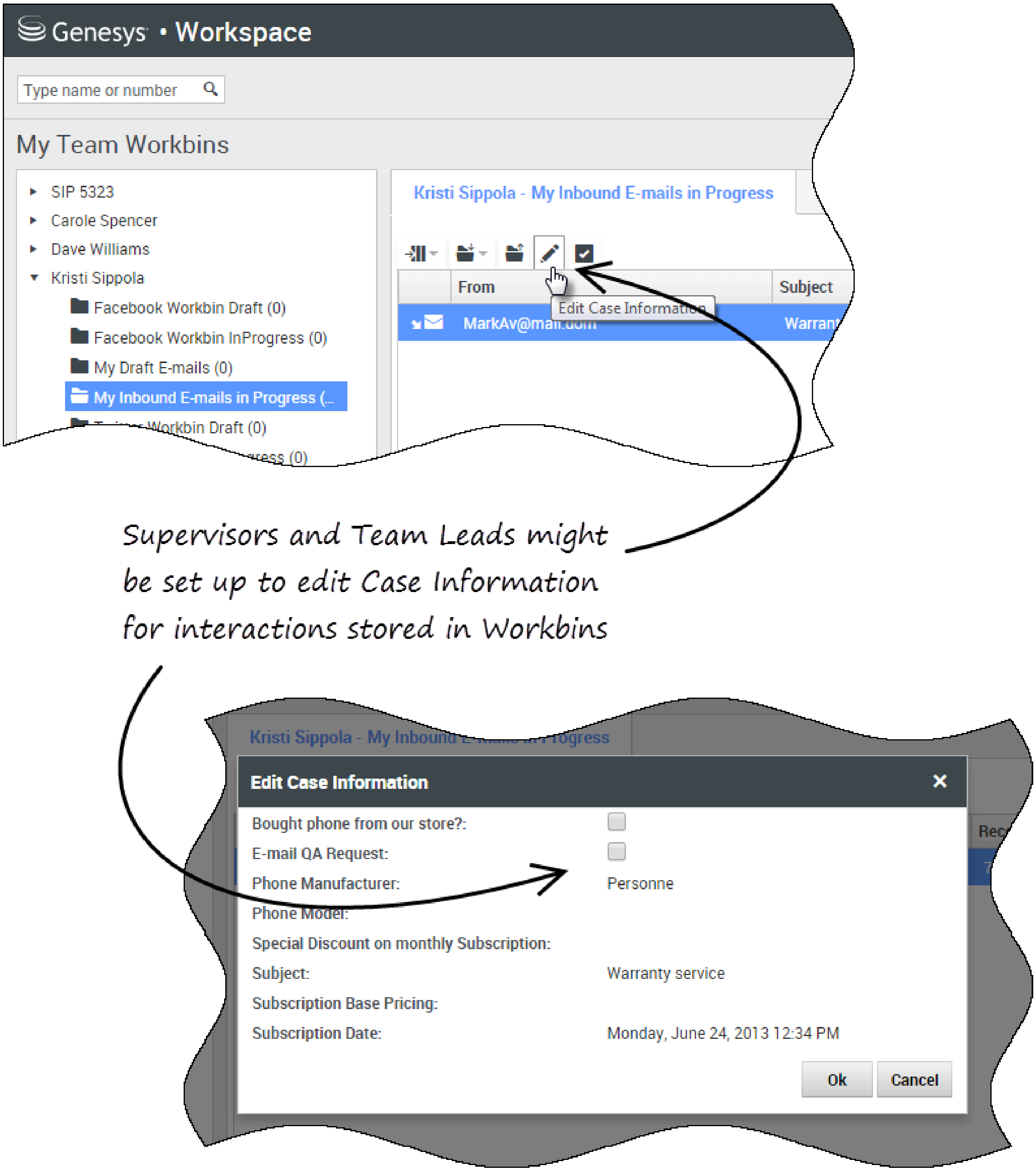
- **Open**
- **Mark Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content

of the Case Data tab for the selected interaction(s).

You can Ctrl-click and/or Shift-click items in a Queue to select more than one item. With multiple items selected you can move them to another Queue, move them to a Workbin, mark them as **Done**, or update the Case Information for all of them in the Case Data tab.



How do I edit Case Information for interactions in Workbins and Queues?



Supervisors and Team Leads might be set up to edit Case Information for interactions that are stored in a Workbin or Queue. Select an interaction to enable the Edit Case Information icon. Click the icon to open the Edit Case Information dialog box. The editing features of this dialog box work the same as the editing features of the Case Information area of an interaction window.

You can edit case information for multiple interactions by selecting two or more interactions. The following rules apply to editing the case information of multiple interactions:

- The Edit Case Information dialog box displays a mix of all of the case information fields that are available in all of the selected interactions.
- Only the common editable fields, check boxes, and menus of the selected interactions are displayed with the edit icon.
- If an editable item has the same value for all of the selected interactions, that value is displayed in the editable field.
- If an editable item has different values for one or more of the selected interactions, the field is displayed as blank.

Agent Desktop (v9)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Agent Desktop lets contact center agents communicate with customers and team members through phone calls and Genesys Digital channels. Supervisors can monitor, coach, and barge-in to interactions and can manage team workbins and QA email.

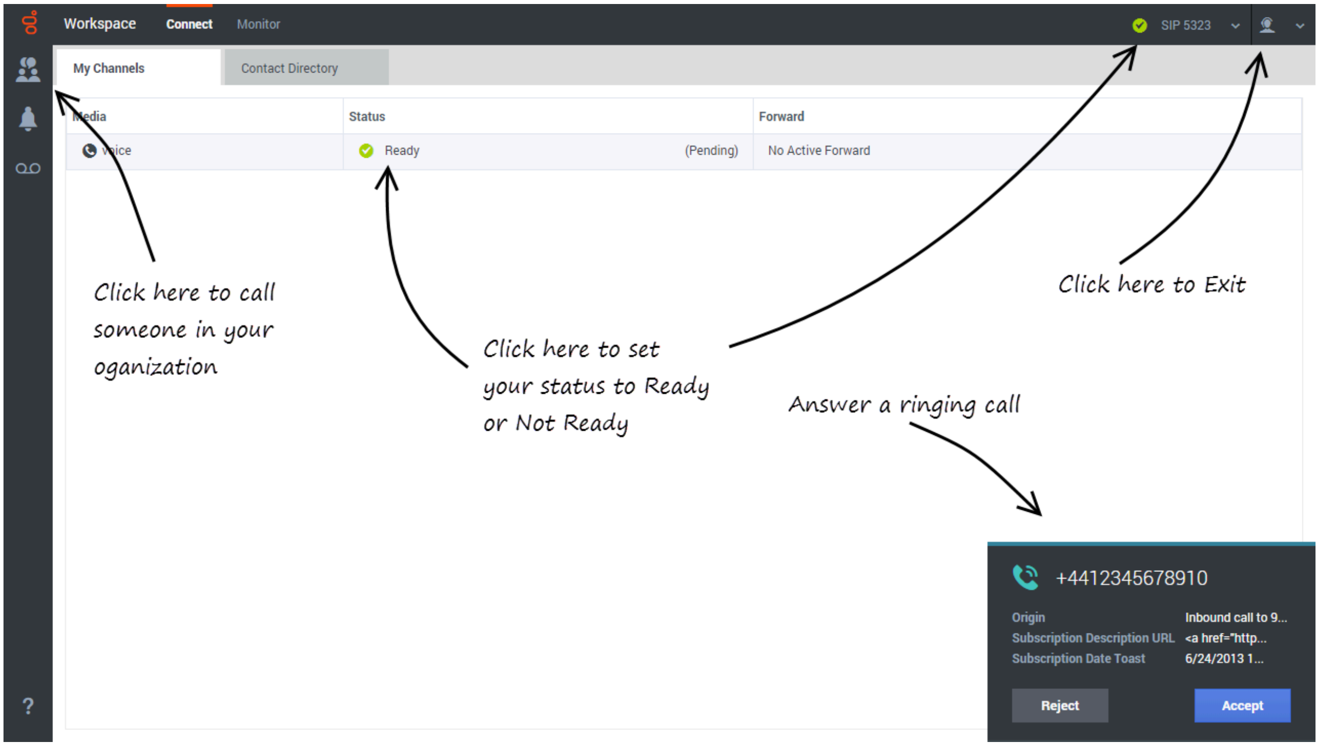
> **Important**
> - Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
> - Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
> - Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

If you are looking for the Agent Desktop v8 help, it is here.

Supervisor Tasks

Supervisors can monitor, coach, and barge-in to interactions and can manage team workbins and QA email.

Agent Tasks



Link to video

Agents can

- respond to or contact customers through the voice and Genesys Digital channels
- get help from team members
- make sure that you are meeting your center's expectations (Statistics and KPIs)

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Lost? See Navigating Agent Desktop.

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels

Are you a **supervisor**? You can monitor agents, calls, and chat interactions.

About The Agent Help

The following topics explain some of the main features of Agent Desktop:

About Agent Desktop

- How to navigate Agent Desktop
- How to use Agent Desktop
- How to login to Agent Desktop
- Watch "How to" videos
- View Contact Center Statistics and Your KPIs

Voice and Digital Interactions

- Call interaction features
- How to handle a call
- Inbound Chats
- Inbound and outgoing email
- In-progress and saved email
- My Workbins

Call Tasks

- Conference Calls
- Transfer Calls
- Consultation Calls
- Recording Calls
- Calling inside your organization
- Calling an Agent Group

Managing Your Status and Communications

- Manage your status
- Launch new interactions
- Manage your channels

Managing Contacts

- The Contact Directory
- Finding Contacts
- Contact Interaction History
- Manual Contact Assignment

Managing Interactions and History

- Interaction Search
- My Interaction History

Customer Journeys

Use Co-browse to guide your customer's journey

Use Altocloud to track your customer's journey

Frequently Asked Questions (FAQ)

How do I change password?

- If this is your first time logging on, you might have to change your password. This happens automatically. A message box is displayed that walks you through the steps. If you are not sure about any of the prompts, your administrator or supervisor can provide you with the details.
- If you need to change your password, send a request to your supervisor requesting a change password email. You supervisor will reset your password, and you will receive a confirmation email. Follow the instructions in the email to change your password.

What happens when I lose connection?

Sometimes network issues can cause Agent Desktop to lose connection to the system. Don't worry, see the Handling a system disconnection article to find out what to do!

What are Skills?

- Skills are things that you are good at, like product specialization or a language that you speak.
- When your supervisor sets up your account, she or he assigns skills and skill levels based on what you can do.
- Skills are used to direct calls to you. If someone calls about a product that you are specialized on, the call will be directed to you and others with the same skill on that product.

How can I find my Call Stats?

- Use the Performance Tracker to see your call activity, worktime, and other reports.
- Use the Dashboard tab to see the list of statistics about the Routing Points, Queues, and other contact center objects.

How do I transfer, conference, or consult on my call?

Agent Desktop lets you start a conference call with someone in your company, transfer your call to another agent or your team lead, or start a consultation call with another member of your team. The call controls at the top of the voice call interaction toolbar open the Team Communicator, a universal lookup tool, that lets you search for and dial other team members. You can also use the Team

Communicator to call someone inside your organization.

How do I call back a contact?

You can also use the **Party Action** menu or Team Communicator to call back the contact if you become disconnected.

What kind of calls and interactions does Agent Desktop let me handle?

- Agent Desktop handles inbound voice calls, Outbound calling campaigns, and Digital Channels: chat, email, social media, and more.

I'm a Team Lead, what can I do with Agent Desktop?

- Agent Desktop has special features for those of you who are Team Leads and Supervisors. You can:
    - Monitor calls and chat (silently listen in)
    - Coach calls and chat (whisper coaching)
    - Barge-in to calls and chat (joining the call)

Supported browsers

You can use any of the following browsers to run Agent Desktop:

- Microsoft Internet Explorer 11
- Microsoft Edge
- Chrome 70+ (Note: Historical Reporting is not supported on Chrome)
- Firefox 63+

What next?

- Getting started
- Watch "How to" videos
- Navigating Agent Desktop
- Calls

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Supervising agents

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Some workers at contact centers are designated to be Team Leads or Supervisors. In this role, it is your responsibility to ensure that the agents that you supervise are successful.

> **Important**
> Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

The Supervisor Role

As a supervisor, your account might be set up to enable you to perform different tasks to manage and support your team and assist with interactions. Supervisor tasks include the following:

Monitor, Coach, and Barge-in

Agent Desktop enables you to monitor, coach, and/or barge-in to voice and/or chat interactions that are being handled by the agents that you supervise.

You can monitor their performance on voice calls and chat interactions, coach them on voice calls and chat interactions as part of their training or to help with a difficult-to-handle contact, or join (barge-in to) a voice call or chat interaction to help the contact directly.

You select which agent or agents to monitor by using the Team Communicator.

> **Tip**

- You can monitor only one agent at a time on the voice channel.
- You can monitor several agents simultaneously on the chat channel.
- If an agent that you want to monitor is logged in to both the voice and chat channels, you can monitor that agent on both channels.

When the agent whom you are monitoring accepts an interaction, an interaction notification is displayed on your desktop. If you accept the interaction, an interaction window is displayed on your desktop, and you are connected to the voice call or chat interaction.

- If you are monitoring the agent, neither the agent nor the contact can hear you or are aware of your presence unless the agent's account is configured to notify the agent when he or she is being monitored (an icon is displayed in the interaction window), or he or she might be configured to be monitored without his or her knowledge.
- If you are coaching an agent during a voice call, the agent can hear you, but the contact cannot. If you are coaching an agent during a chat interaction, the agent can see your chat messages, but the contact cannot.
- You can choose to join (barge-in to) a call or chat interaction that you are monitoring.
- Agent Desktop enables you to switch from certain team supervision modes to others.

How do I monitor my agents?

You start monitoring an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Monitor Agent** ().

You can end monitoring an agent by using the Team Communicator and selecting **Stop Monitoring** in the **Action Menu** ().

You can stop monitoring the current interaction by clicking **End Monitoring** () in the Call Actions toolbar in the interaction window.

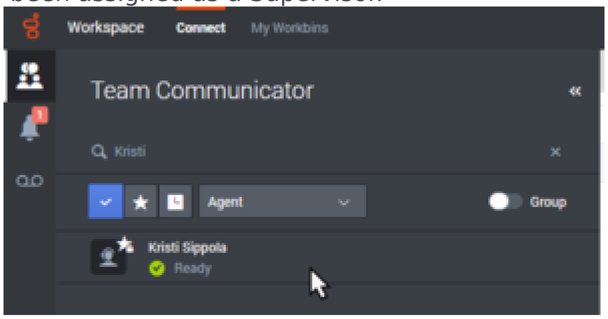
When you monitor a selected agent who is already handling an interaction, an interaction preview window tells you that the selected agent is handling an interaction. Your account might be set up to let you start monitoring the current voice or chat interaction of an agent; if not, you can monitor the next interaction of the agent.

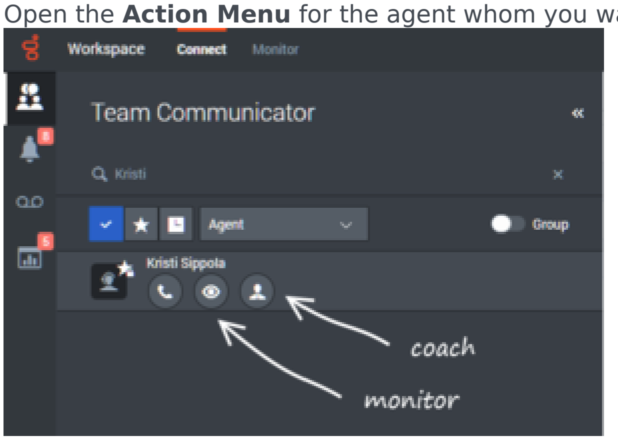
Monitoring a Voice Interaction

Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agent accounts can be configured to notify the agent when they are being monitored.

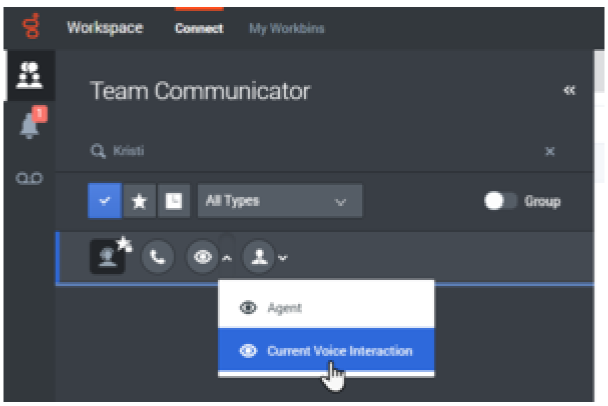
Tip

You can monitor only one voice agent at a time.

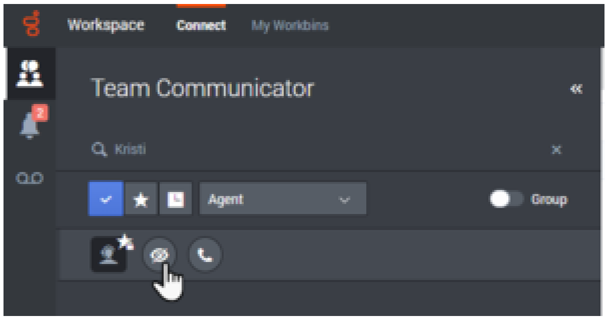
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor.


2. Open the **Action Menu** for the agent whom you want to monitor and select **Monitor Agent**.


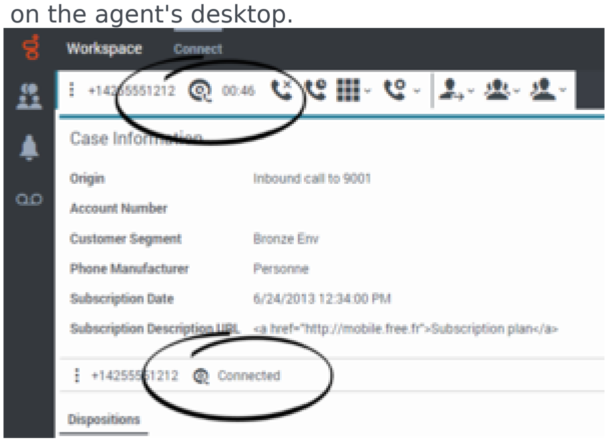
Or, to monitor the next interaction if your account is set up to let you monitor the current or next interaction, open the **Action Menu** for the agent you want to monitor and select **Monitor**, then select **Agent**. To monitor the current interaction, open the **Action Menu** for the agent you want to monitor and select **Monitor**, then select **Current Voice Interaction**.



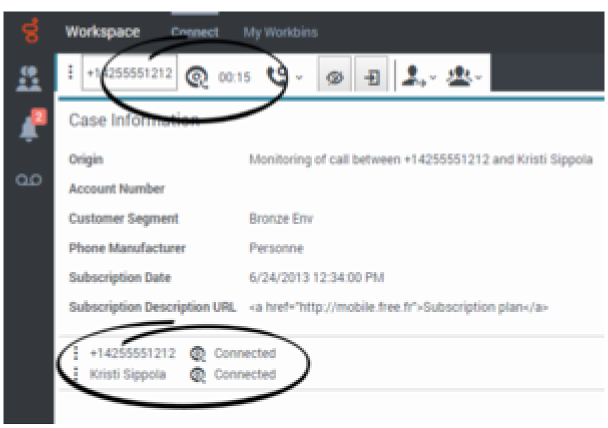
A system message is displayed that informs you that monitoring of interactions has started for the selected agent. In the Team Communicator, the **Action Menu** for the agent whom you are monitoring changes to the **Stop Monitoring** button.



3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties.
   If you do not click **Accept**, the notification will be dismissed automatically.
   If the agent is already handling an interaction when you start monitoring, you might have to wait for the next interaction to start monitoring.
   If the account of the monitored agent is configured so that the agent is notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party **Action** menu.

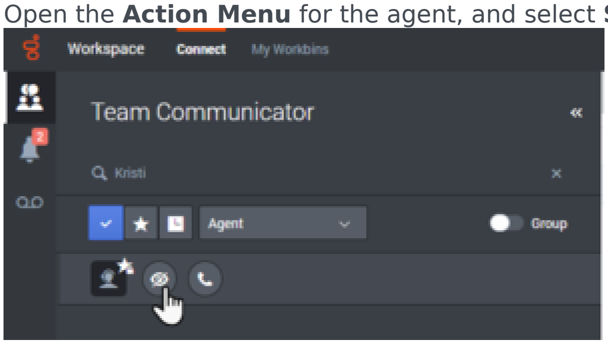


4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:

- End Monitoring—Click **End Monitoring** ( ) in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
- Barge-in—Click **Barge-in** ( ) in the Supervisor controls of the **Call Actions** toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking **End the Call** ( ) in the **Call Actions** toolbar.

If you stop monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.
If the agent ends the call while you are still monitoring the agent, your monitoring session ends automatically.

5. Click **Done** to close the Voice Interaction Monitoring window and mark the interaction as **Done**.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the **Action Menu** for the agent, and select **Stop Monitoring**.

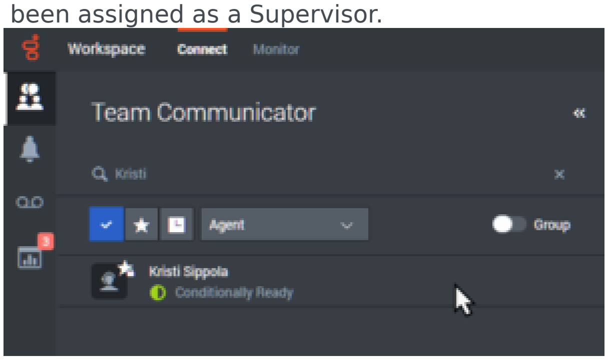


A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

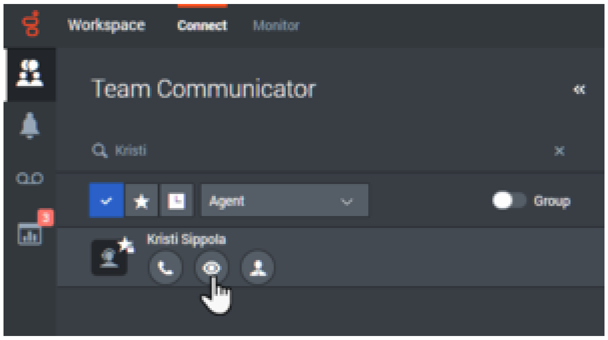
Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agent accounts can be configured to notify agents when they are being monitored.

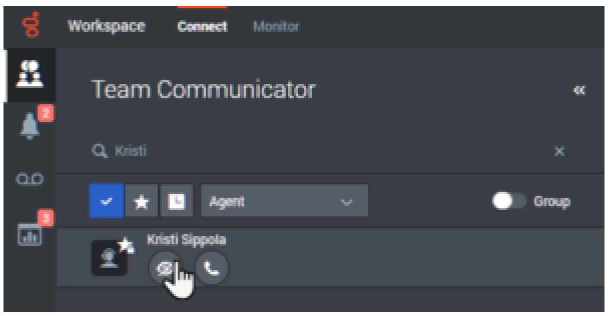
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor.



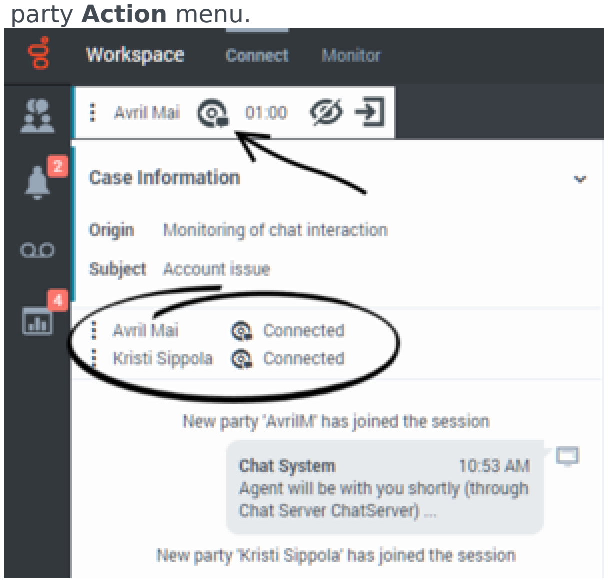
2. To monitor the next interaction, open the **Action Menu** for the agent whom you want to monitor and select **Monitor Next Interactions**.

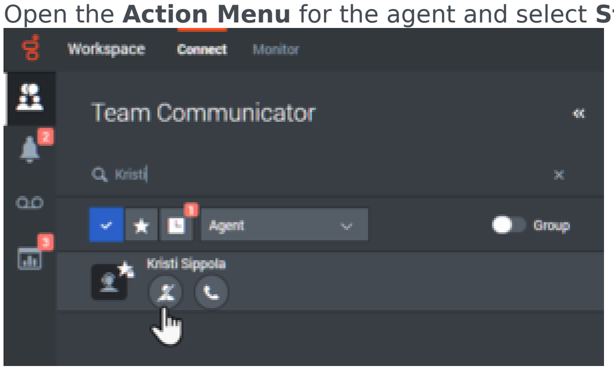


A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the **Action Menu** for the agent whom you are monitoring changes to the **Stop Monitoring** button.



3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent.
   If you do not click **Accept**, the notification will be dismissed automatically.
   If the agent is already handling an interaction when you start monitoring, you might have to wait for the next interaction to start monitoring.
   The monitoring icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party **Action** menu.



4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:
    - End Monitoring—Click **End Monitoring** ( ) in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
    - Barge-in—Click **Barge-in** ( ) in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking **End Chat** ( ) in the **Call Actions** toolbar.
    - Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. A voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.
    - Coach via chat—Select **Coach via Chat** from the agent party **Action** menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent.
      If you stop monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.
      If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.
5. Click **Done** to close the Chat Interaction Monitoring window and mark the interaction as **Done**.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the **Action Menu** for the agent and select **Stop Monitoring**.


   A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

How do I coach my agents?

You can start coaching an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Coach Agent** ( ). Your account might also be set up to let you coach the current voice interaction of an agent.

You can end coaching an agent by using the Team Communicator and selecting **Stop Coaching** from the **Action Menu** ( ).

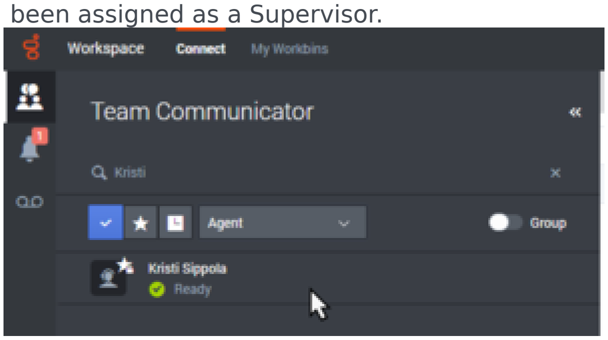
You can end coaching the current interaction by selecting **End Monitoring** ( ) in the Call Actions toolbar in the interaction window.

When you coach a selected agent who is already handling an interaction, an interaction preview window tells you that the selected agent is handling an interaction. Your account might be set up to let you start monitoring the current voice or chat interaction of an agent; if not, you can monitor the next interaction of the agent.

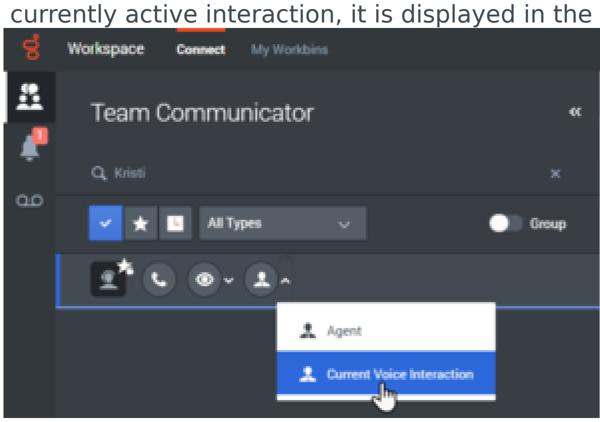
Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next interaction of an agent.

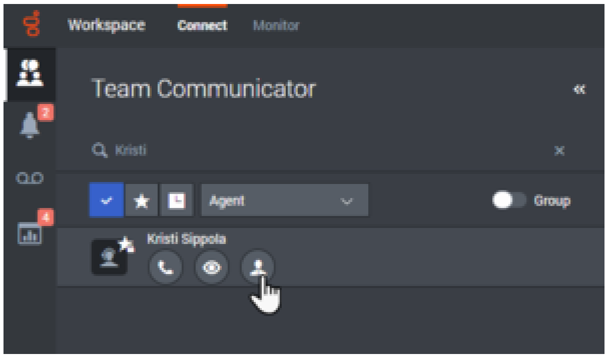
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor.



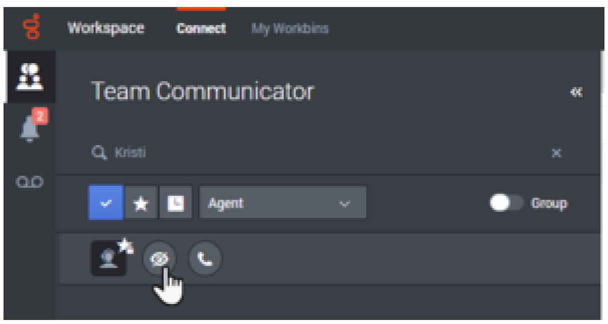
2. Open the **Action Menu** for the agent whom you want to coach and select **Coach Agent**. If there is a currently active interaction, it is displayed in the **Coach** menu.



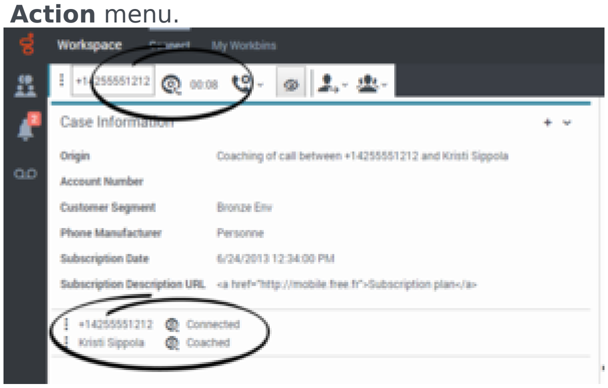
Or, to coach the next interaction if your account is set up to let you coach the current or next interaction, open the **Action Menu** for the agent you want to coach and select **Coach**, then select **Agent**. To coach the current interaction, open the **Action Menu** for the agent you want to coach and select **Coach**, then select **Current Voice Interaction**.



A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.



3. When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent.
If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.
If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click **Accept**, you will begin coaching the call that is already in progress.
The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party **Action** menu.

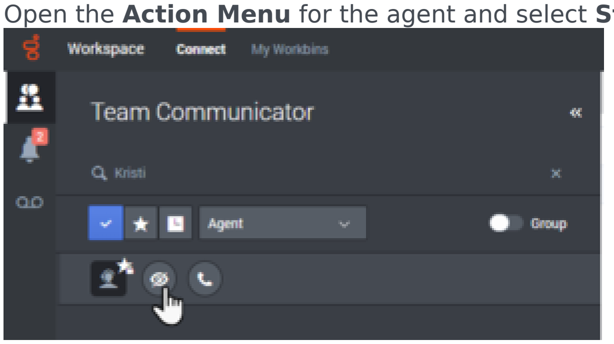


4. During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:

   - End Monitoring—Click **End Monitoring** ( ) in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.

If you stop coaching, you are disconnected from the call.
If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click **Done** to close the Voice Interaction Coaching window and mark the interaction as **Done**.
6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching**.

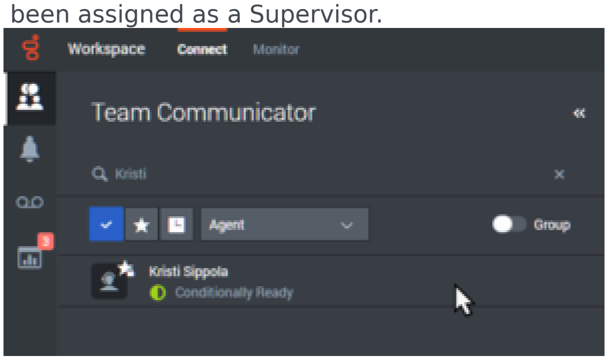


A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

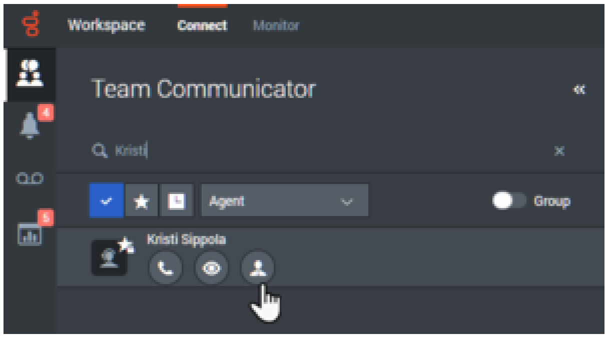
Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent.

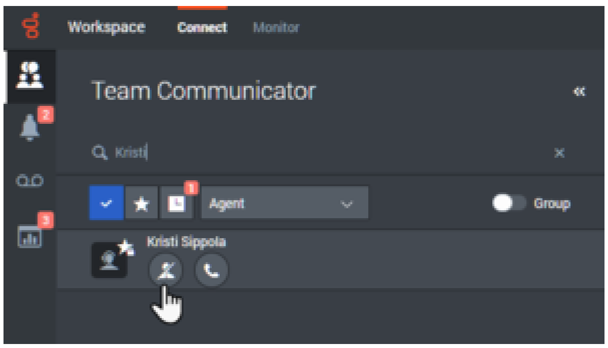
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor.



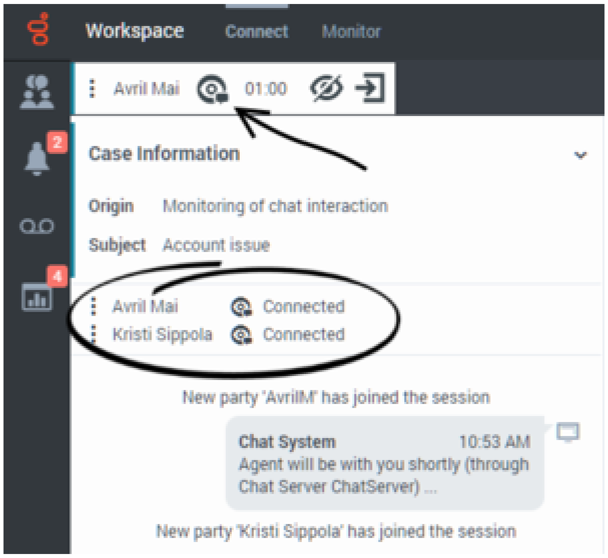
2. Open the **Action Menu** for the agent whom you want to coach and select **Coach next interactions**.



A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.



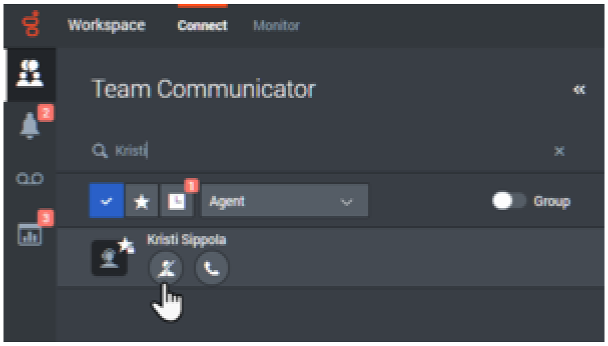
3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages.
 If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.
 If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click **Accept**, you will begin coaching the chat session that is already in progress.
 The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party **Action** menu.



4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:

   - End Monitoring—Click **End Monitoring** ( ) in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.
   - Barge-in—Click **Barge-in** ( ) in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.
     Click **Done** to close the coaching session in the window and mark the coaching interaction as **Done**. You can switch to monitoring the chat session (see *Monitoring a Chat Interaction* in the **Monitor** tab) by clicking **End Chat** ( ) in the **Call Actions** toolbar.
   - Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. A voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.

   If you stop coaching, you are disconnected from the chat session.
   If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.
5. Click **Done** to close the Chat Interaction Coaching window and mark the interaction as **Done**.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching**.



A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

How do I Barge-in on my agent's call?

When you barge-in (join) to an active interaction, you must already be monitoring or coaching the interaction.

To barge-in to an active interaction that you are monitoring, click **Barge-in** () in the Supervision toolbar. **Barge-in** is a simple button if you are supervising a single channel interaction (voice or chat).

How do I switch my Agent Monitoring Mode?

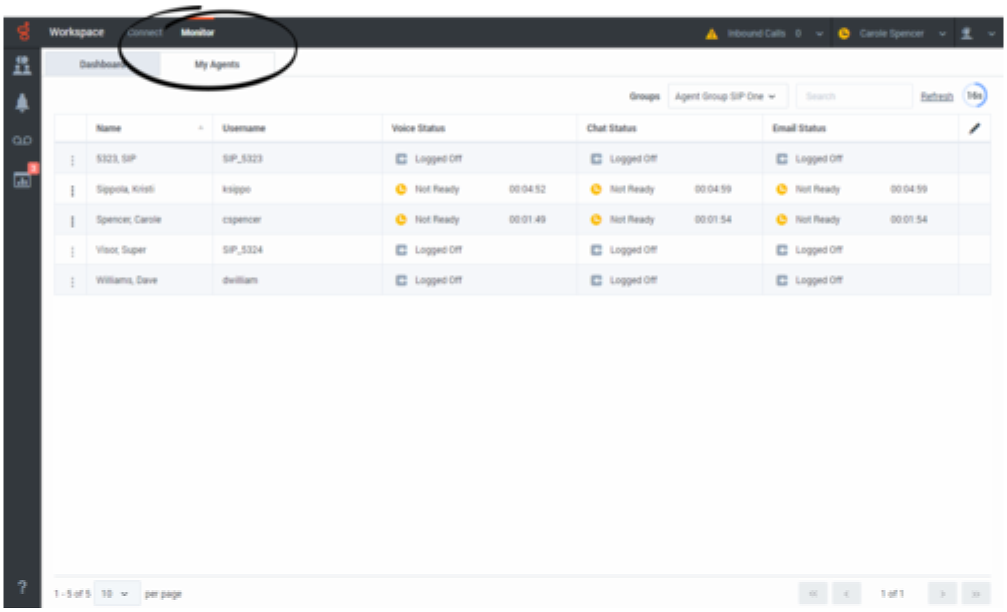
Agent Desktop enables you to switch from certain supervision modes to others. During the monitoring, coaching, or barge-in of an interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to barge-in—Click **Barge-in** () in the `Supervision` bar.
- Coaching to barge-in (chat only)—Click **Barge-in** (in the `Supervision` bar.
- Coaching to monitoring (chat only)—Click **End Chat** ().
- Barge-in to monitoring—Click **End Call** () or **End Chat** () in the Interaction toolbar to return to monitoring.
- Use **End Monitoring** () in the Interaction toolbar to end monitoring.

How do I manage the State of my agents?

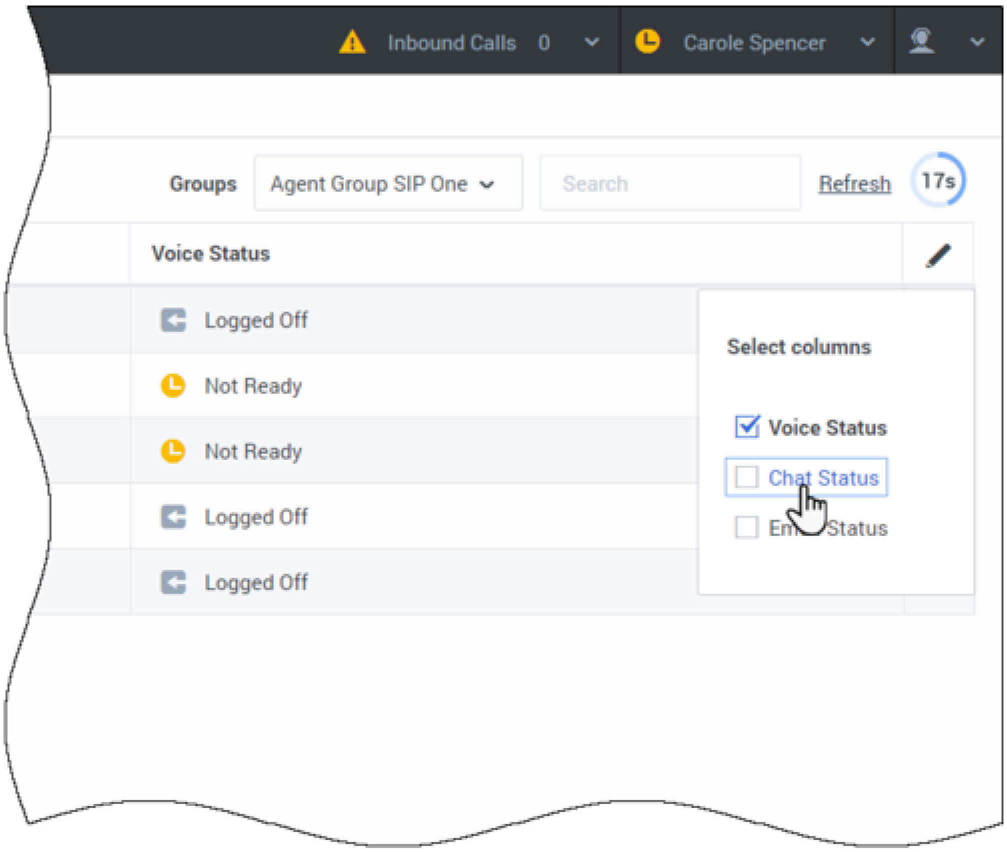
The **My Agents** view lets you view and control the ready state and logged in state of all of the agents that you manage.

Open **My Agents** from the **Monitor** group.



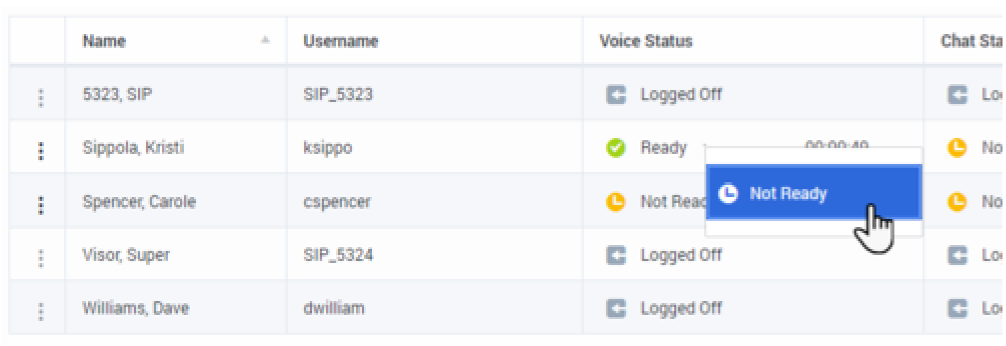
This view has two parts, the filters and the table of agents. Use the filters to find agents by **Group**, **Status**, and **First name** and/or **Last name**. Find a specific agent or agents by using the **Search** field.

Click the pencil icon to select which channels to show in the table.



Refresh the view by clicking **Refresh**. The view might also automatically refresh for you; if your account is enabled for this feature, a countdown to the next refresh is displayed next to the **Refresh** button.

In the table of agents, click a status to change it, for example from **Ready** to **Not Ready**. To change the status of an agent on more than one channel, click the action menu next to their name and select the status.



The table displays different agent states depending on whether they are handling interactions and whether they are at or below capacity.

Agent's state	Handling interaction	At capacity	Table display
Ready	No	No	Ready
Not Ready (with or without reason)	No	No	Not Ready (with or without reason)
After Call Work (with or without reason)	No	No	After Call Work (with or without reason)
Do Not Disturb	No	No	Not Ready
Ready	Yes	No	Engaged
Ready	Yes	Yes	Busy
Not Ready (with or without reason)	Yes	Yes	Busy
Not Ready (with or without reason)	Yes	No	Busy
After Call Work (with or without reason)	Yes	Yes	Busy
After Call Work (with or without reason)	Yes	No	Busy
Do Not Disturb	Yes	Yes	Busy
Do Not Disturb	Yes	No	Busy

Log off an agent

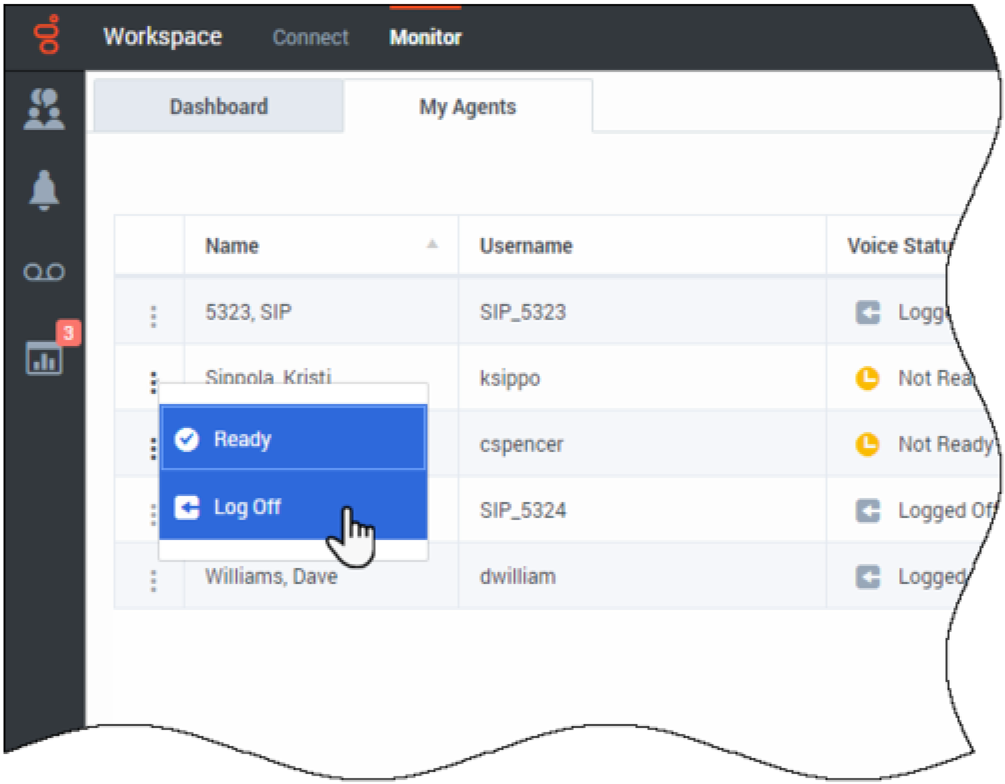
The Log off Agent feature is useful if you discover that an agent has forgotten to log off after their shift. Logging off the agent on all channels is beneficial because it ensures that your company is not unnecessarily consuming seat licenses, and it also prevents interactions from being routed to an agent who is not present but is configured for auto-answer!

To log off an agent, click the action menu next to their name in the table and select **Log Off**.

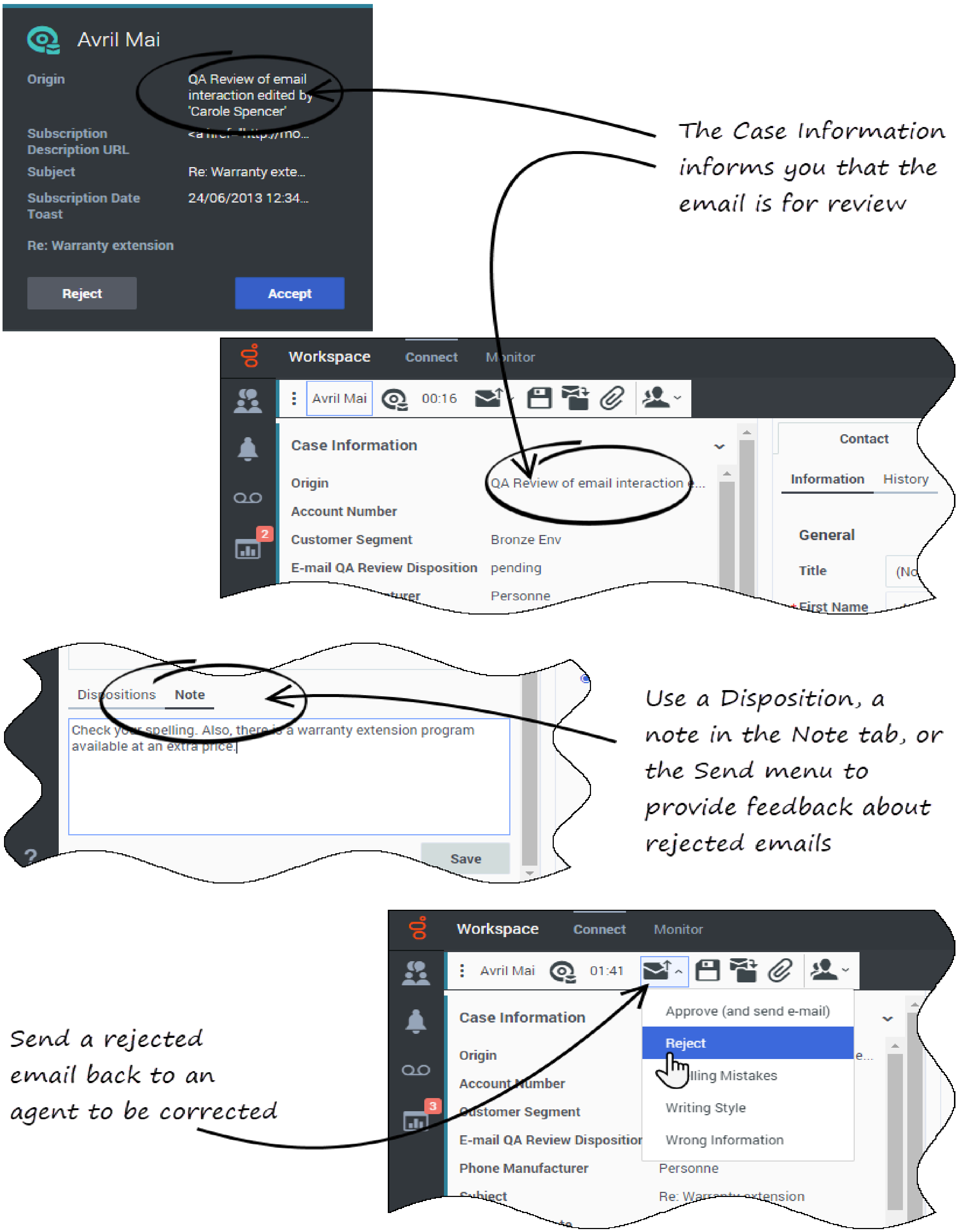
Important

If you log off an agent while they are handling an interaction you are warned that the agent is still handling an interaction and are given the opportunity to cancel the action. If you proceed with the log off, the interaction finalization is handled according to the type of interaction. Voice calls remain connected to the agent's DN, emails return to queue or workbin, and a chat returns to queue.

Genesys does not recommend logging off an agent who is handling a call until the call is ended.


Workspace
Connect
Monitor
Dashboard
My Agents
Name
Username
Voice Statu
5323, SIP
SIP_5323
Logg
Sippola, Kristi
ksippo
Not Rea
Ready
cspencer
Not Ready
Log Off
SIP_5324
Logged Of
Williams, Dave
dwilliam
Logged
3

How do I review an outbound email?


Avril Mai
Origin
QA Review of email interaction edited by 'Carole Spencer'
Subscription Description URL
Subject
Re: Warranty exte...
Subscription Date Toast
24/06/2013 12:34...
Re: Warranty extension
Reject
Accept
The Case Information informs you that the email is for review
Workspace
Connect
Monitor
Avril Mai
00:16
Case Information
Origin
QA Review of email interaction e...
Account Number
Customer Segment
Bronze Env
E-mail QA Review Disposition
pending
Personne
Contact
Information
History
General
Title
First Name
Dispositions
Note
Check your spelling. Also, there is a warranty extension program available at an extra price.
Save
Use a Disposition, a note in the Note tab, or the Send menu to provide feedback about rejected emails
Workspace
Connect
Monitor
Avril Mai
01:41
Case Information
Origin
Account Number
Customer Segment
E-mail QA Review Disposition
Phone Manufacturer
Approve (and send e-mail)
Reject
Writing Style
Wrong Information
Personne
Send a rejected email back to an agent to be corrected

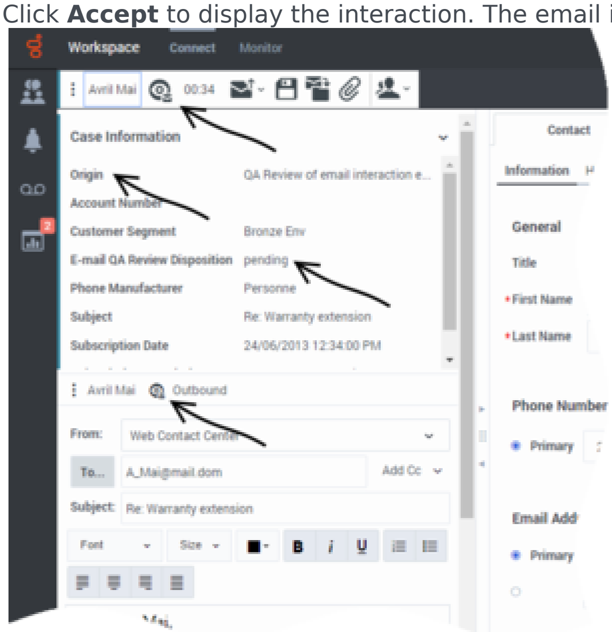
Link to video

Agents: Your outgoing email interactions might be read and edited by your team lead, supervisor, or another person tasked with Quality Assurance at your company. They might edit the email before sending it to the contact, or they might return it to you with comments that you have to fix in the email before it will be sent.

Supervisors/Team Leads/Reviewers: You might be assigned the task of reviewing, editing, or commenting on outgoing email interactions at your company. This section and the next are for you. These sections describe what to do when an outgoing email is directed to you for Quality Review (QA) before being sent to a contact.

Your company might direct outgoing emails to you for QA purposes. The following example shows you what you might do when there is problem with an email and it must be returned to the agent to be fixed.

1. When an email interaction for review is directed to you, an interaction preview window opens. The Case Information indicates that the email is for QA review. In this example, the "Origin" field contains the text: "QA Review of email interaction...".
2. Click **Accept** to display the interaction. The email interaction is displayed on your desktop.



   - The Case Information view might be set up to provide you with information about who wrote the email.
   - The Email Review icon ( ) is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.

3. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix. Depending on the policy at your company, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent, or you might discuss the content with the agent verbally. Other actions available to you include:
   - Save changes that you made to the email interaction

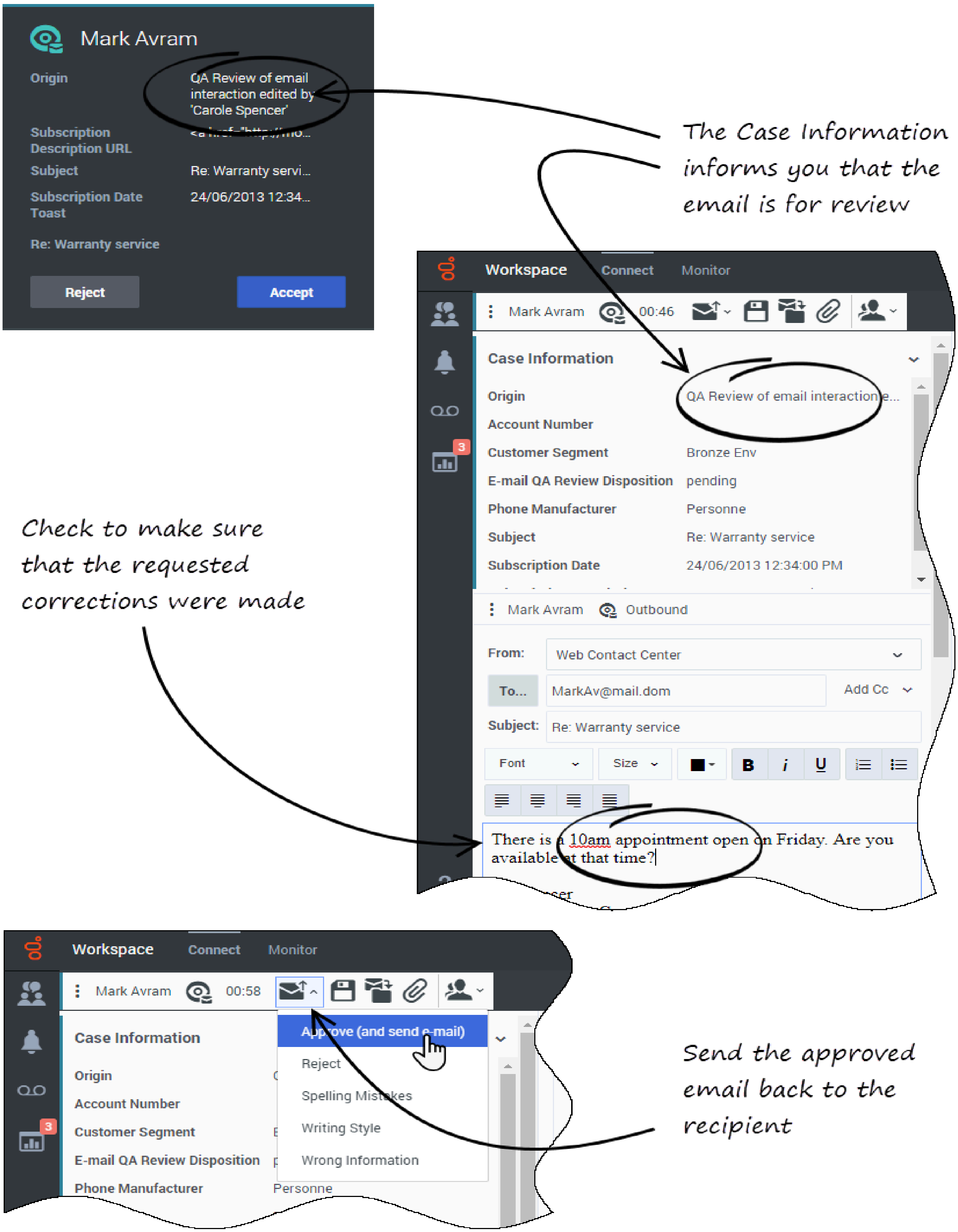
- Move the email to a workbin to save the email in your draft email workbin to process later (in some environments, you might have a 'pending review' workbin in which to save QA review emails)
- Attach a file to the email
- Start a consultation

4. Email interactions that are sent to you for review have a drop-down menu on the **Send** () button.
   The contents of this menu are set up by your administrator and so might be different than in the example and video to the left.

   Click to open the menu.

   In this example, a problem was found, so this email is being returned to the agent to fix. The administrator has set up different 'Reject Reasons' which will be included in the Case Information when the interaction is returned to the agent.
5. Click one of the **Reject** options to send the email back to the original agent.
6. After the agent fixes the email it is directed to you or another reviewer and is ready to be approved and sent.

How do I approve a fixed outbound email?


Mark Avram
Origin
QA Review of email interaction edited by 'Carole Spencer'
Subscription Description URL
Subject
Re: Warranty servi...
Subscription Date Toast
24/06/2013 12:34...
Re: Warranty service
Reject
Accept
The Case Information informs you that the email is for review
Workspace
Connect
Monitor
Mark Avram
00:46
Case Information
Origin
QA Review of email interaction e...
Account Number
Customer Segment
Bronze Env
E-mail QA Review Disposition
pending
Phone Manufacturer
Personne
Subject
Re: Warranty service
Subscription Date
24/06/2013 12:34:00 PM
Mark Avram
Outbound
From:
Web Contact Center
To...
MarkAv@mail.dom
Add Cc
Subject:
Re: Warranty service
Font
Size
There is a 10am appointment open on Friday. Are you available at that time?
Check to make sure that the requested corrections were made
Workspace
Connect
Monitor
Mark Avram
00:58
Case Information
Origin
Account Number
Customer Segment
E-mail QA Review Disposition
Phone Manufacturer
Personne
Approve (and send e-mail)
Reject
Spelling Mistakes
Writing Style
Wrong Information
Send the approved email back to the recipient

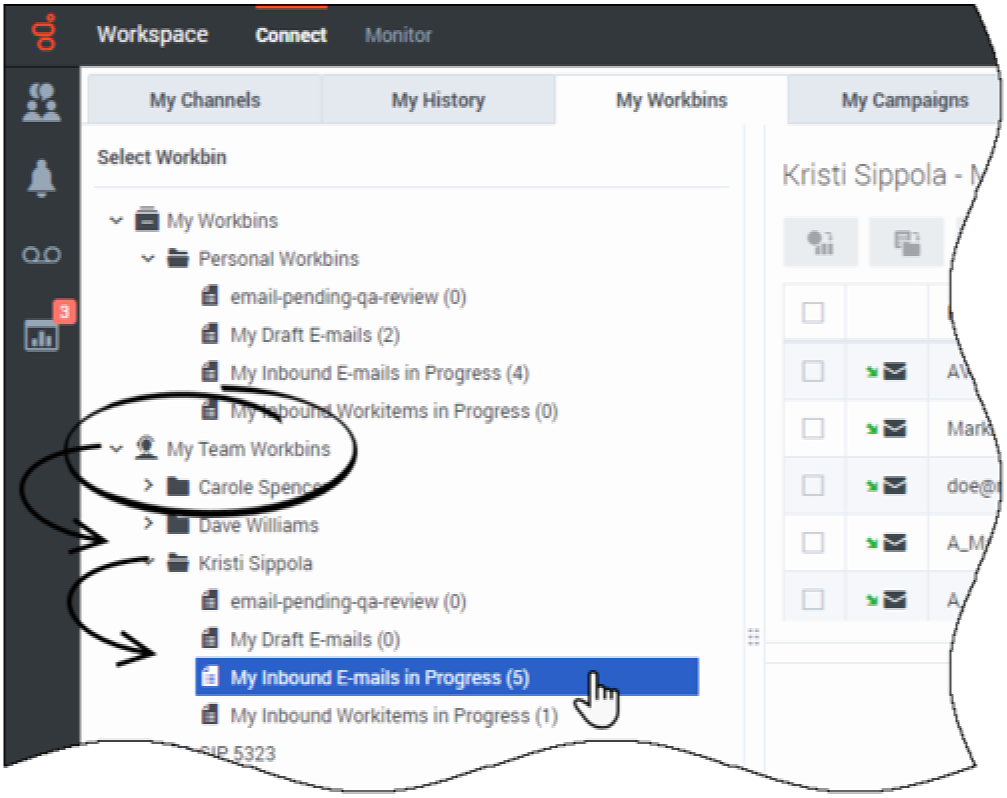
If you are a reviewer, outbound emails might be directed to you before they are sent to a contact. In this example, the agent has fixed an earlier identified problem, and the email is directed to you to review.

1. When an email interaction for review is directed to you, an interaction preview is displayed on your desktop. The Case Information indicates that the email is for QA review. In the example to the left, the "Origin" field contains the text: "QA Review of email interaction...".
2. Click **Accept** to display the interaction. The email interaction is displayed on your desktop.
   - The Case Information view might be set up to provide you with information about who wrote the email.
   - The Email Review icon () is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.
3. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix.
4. Assuming that the email is now okay to send to the contact, click the **Send** () button to open the menu. Since the email is now ready to send to the contact, select the option that represents **Accept**. In this example, the administrator has added the **Approve (and send email)** option to the menu.

How do I use the My Team Workbins?

If your account is set up to enable you to manage the workbins of the agents that you supervise, you will see the **My Team Workbins** list in the **Select Workbin** list of the **My Workbins** tab in the **Connect** group area.

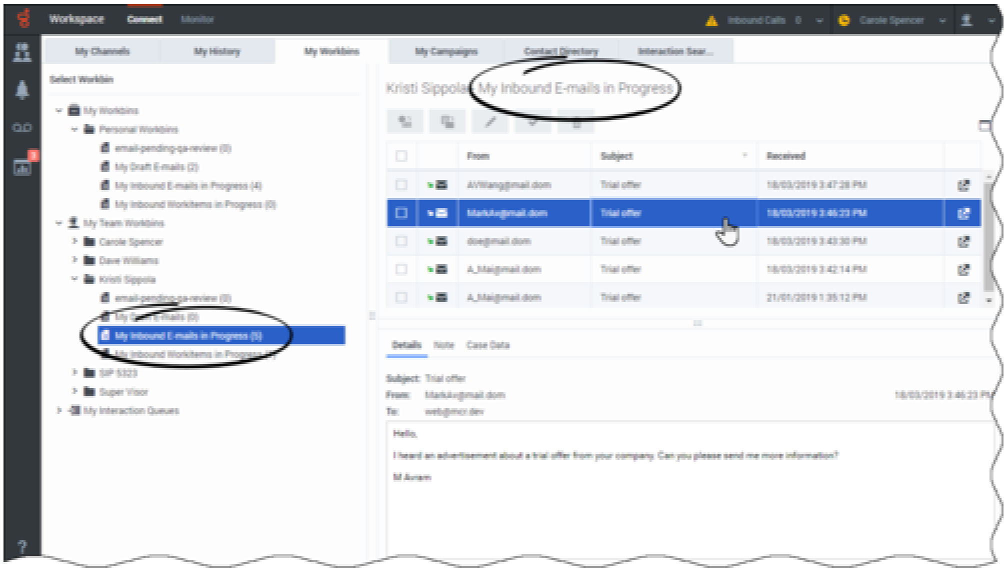
The **My Team Workbins** view contains an expandable list of all of the agents that you supervise. If you click the agent name or the arrow next to the name of one of your agents the view expands to show you the workbins for that agent and the number of interactions stored in each.



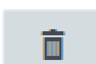
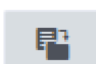
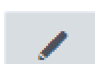
To view and manage the interactions that are stored in the agent's workbin, click the name of the workbin. The list of interactions stored in the workbin is displayed for you in the panel to the right of the workbin list.

When you select an interaction in a workbin, the contents, notes, and case data are displayed in tabs at the bottom of the Workbin view.

You can open an interaction to view or handle it by double-clicking it or by clicking **Open**.



Workbin action controls are displayed at the top of the Workbin view. These let you perform actions on the interaction that you mark. Mark interactions for actions by clicking the check box next to them. The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have marked:

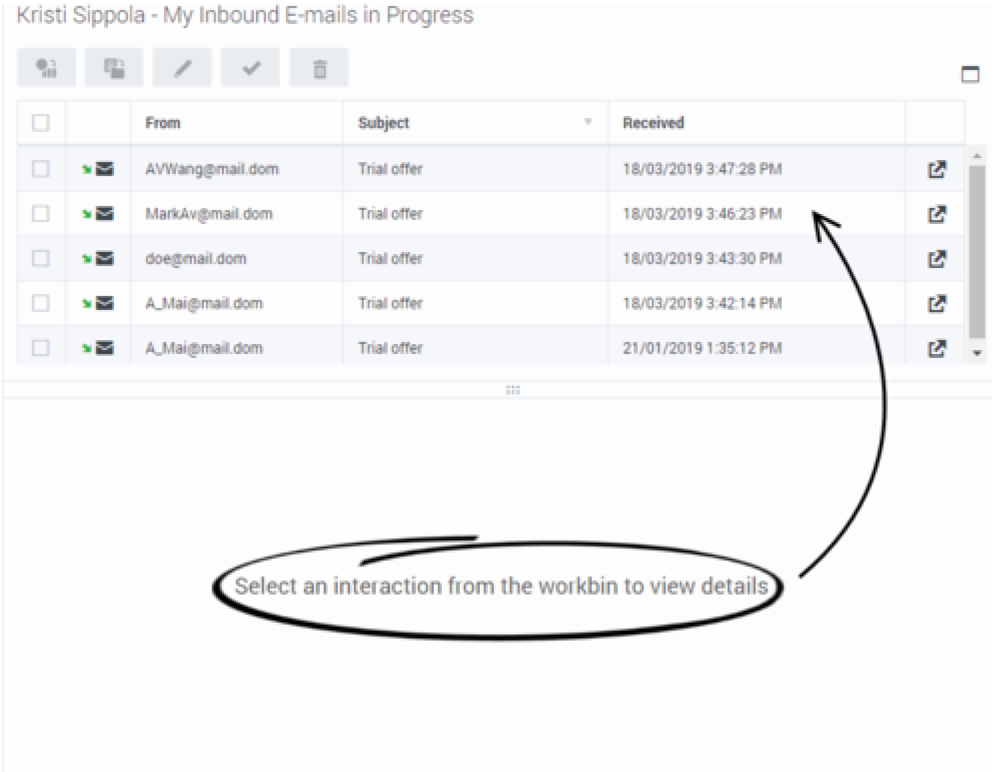
- **Done** 
- **Delete** 
- **Move to Queue** 
- **Move to Workbin** 
- **Edit Case Information**  Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the marked interaction(s).

Watch this video to learn how to use My Team Workbins:

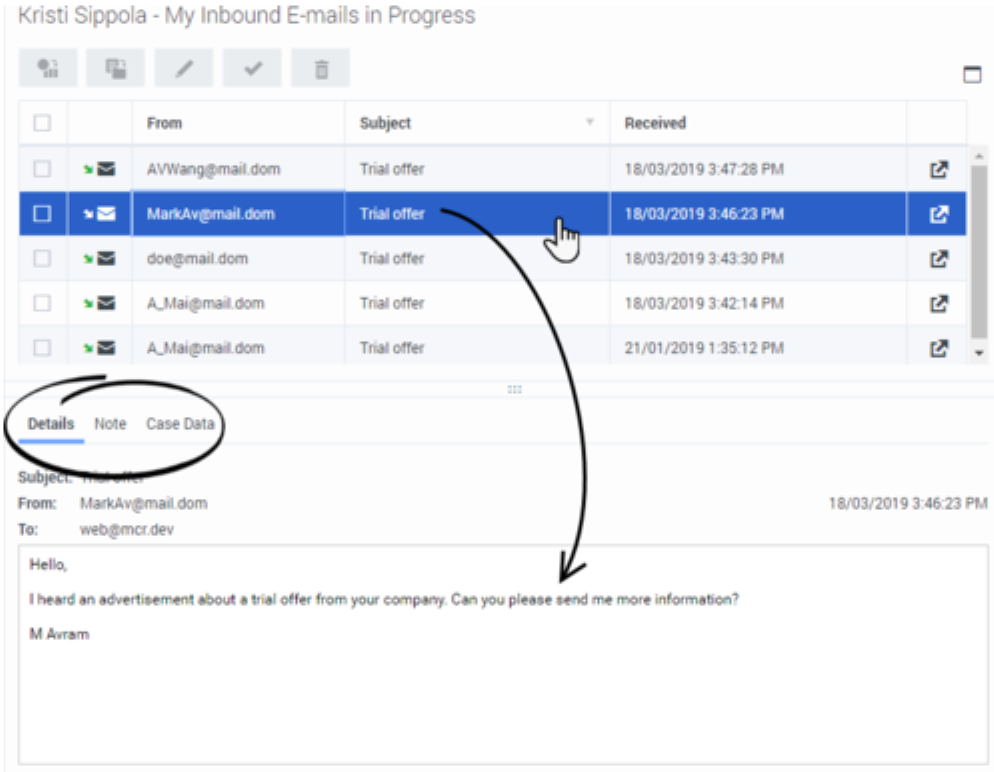
Link to video

How do I manage one or more interactions in a Workbin or Interaction Queue?

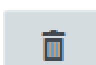
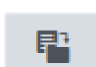
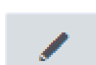
There are two ways to choose items in a Workbin or Interaction Queue, one for viewing and one for different actions.

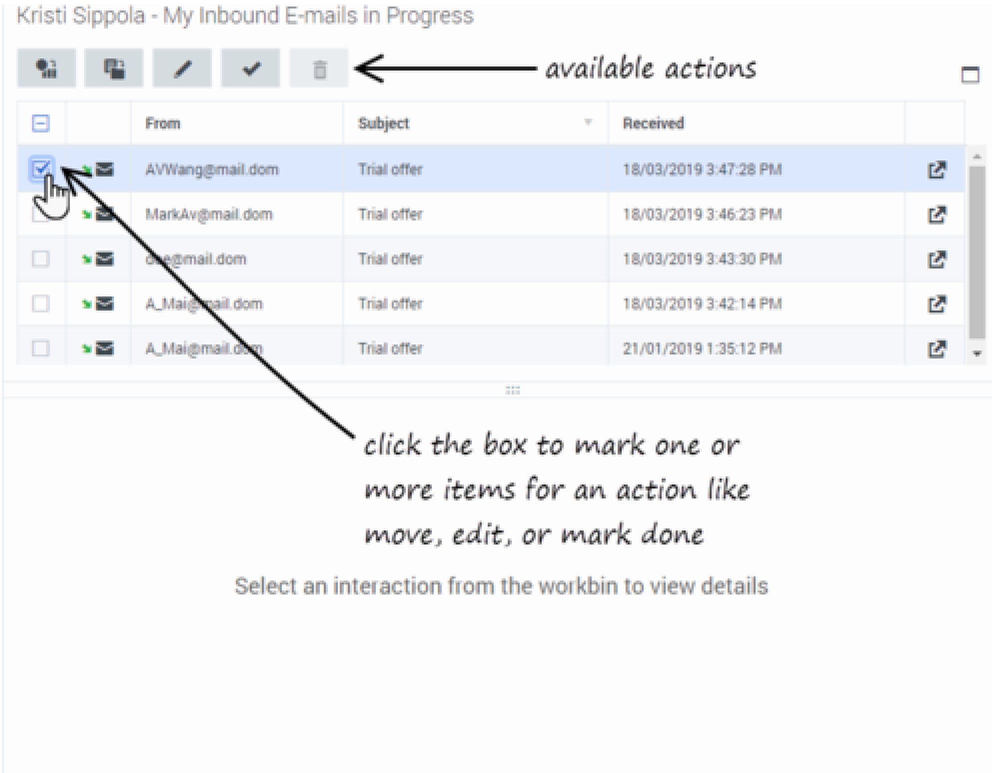


Click a row to view the details, notes, and case data of the interaction in the tabs at the bottom of the view.



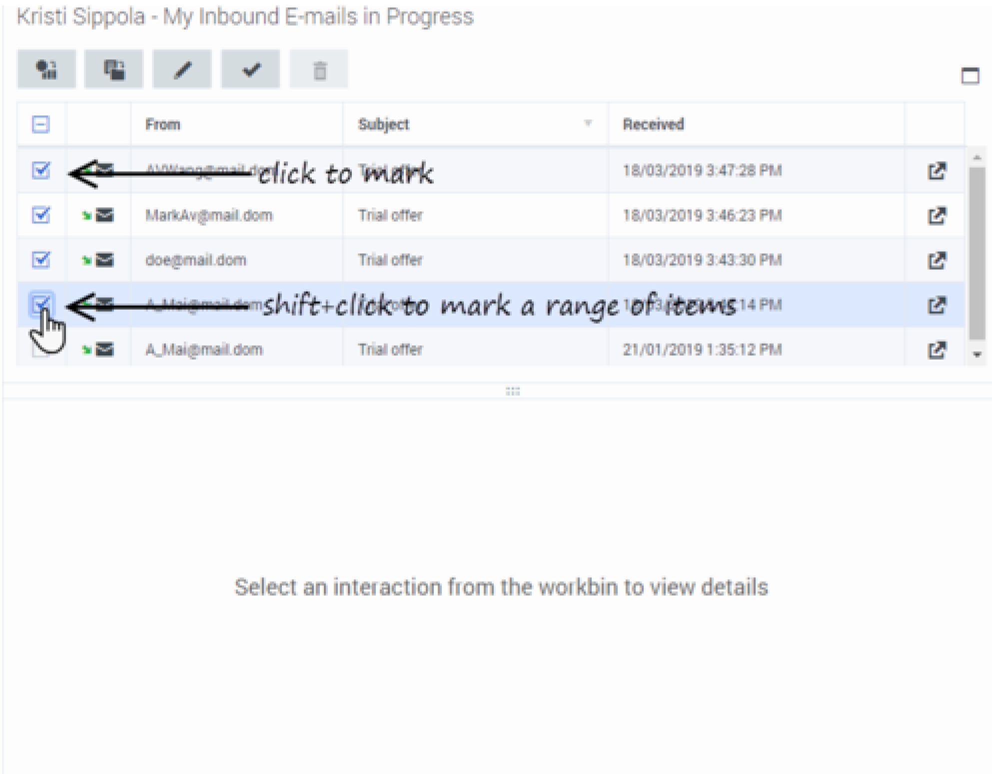
You can also mark one or more items for actions. The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have marked:

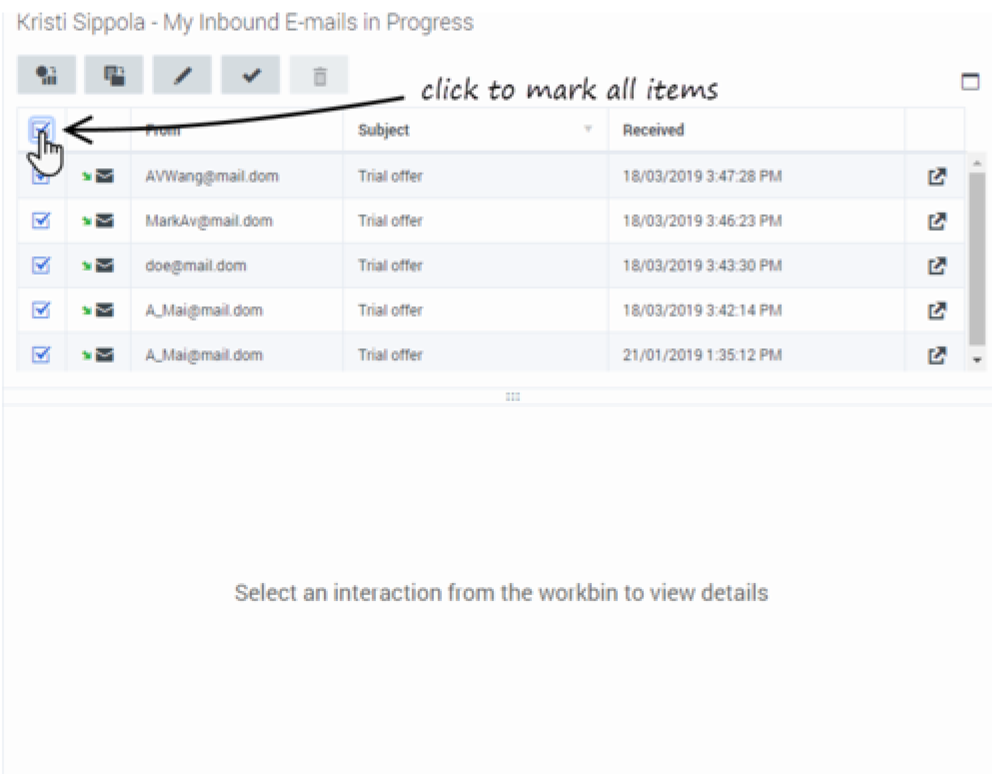
- **Done** 
- **Delete** 
- **Move to Queue** 
- **Move to Workbin** 
- **Edit Case Information**  Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the marked interaction(s).



There are different ways to mark multiple interactions:

- You can click the check box next to each one that you want to mark
- You can click one, then shift+click another to mark both plus all the interactions in between
- You can click the **Mark All** box at the top of the table to mark all interactions (click it again to unmark all)


Kristi Sippola - My Inbound E-mails in Progress
From
Subject
Received
click to mark
18/03/2019 3:47:28 PM
MarkAv@mail.dom
Trial offer
18/03/2019 3:46:23 PM
doe@mail.dom
Trial offer
18/03/2019 3:43:30 PM
shift+click to mark a range of items
A_Mai@mail.dom
Trial offer
21/01/2019 1:35:12 PM
Select an interaction from the workbin to view details

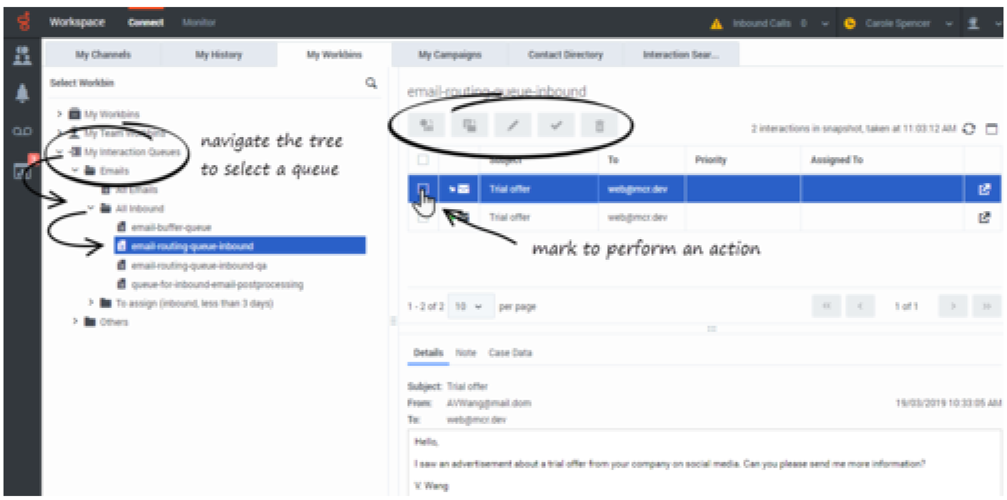

Kristi Sippola - My Inbound E-mails in Progress
click to mark all items
Subject
Received
AVWang@mail.dom
Trial offer
18/03/2019 3:47:28 PM
MarkAv@mail.dom
Trial offer
18/03/2019 3:46:23 PM
doe@mail.dom
Trial offer
18/03/2019 3:43:30 PM
A_Mai@mail.dom
Trial offer
18/03/2019 3:42:14 PM
A_Mai@mail.dom
Trial offer
21/01/2019 1:35:12 PM
Select an interaction from the workbin to view details

After marking one or more interactions, click an action button to perform that action on all the marked interactions.

How do I manage My Interaction Queues?

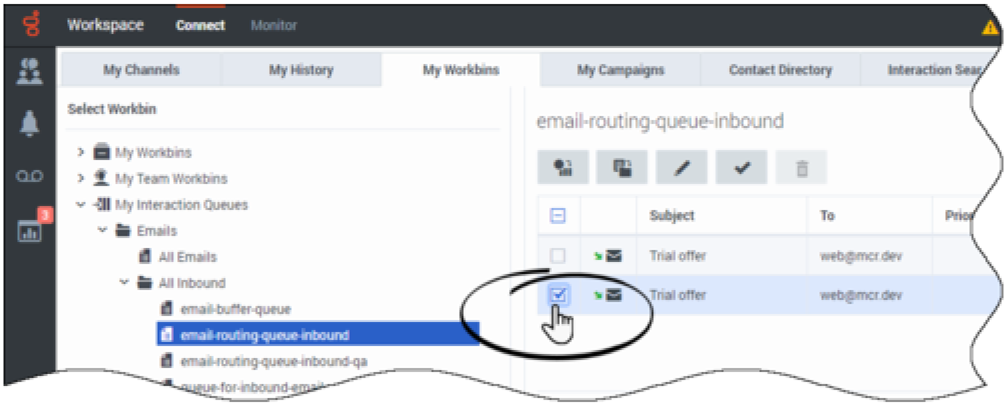
If your account is set up to enable you to manage the Interaction Queues of your contact center, you will see the **My Interaction Queues** list in the **Select Workbin** list of the **My Workbins** tab in the **Connect** group area.

The **My Interaction Queues** view contains an expandable list of all of the interaction queues that your account is set up to manage. Interaction queues might be grouped by type in folders. If you click the folder name or the arrow next to the name of the folders, the view expands to show you the queues in that folder. Click a queue to view its contents. The list of interactions stored in the queue are displayed for you in the panel to the right of the queue list.

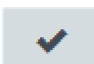
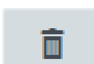
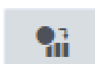
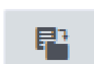
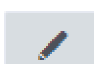


When you select an interaction in an interaction queue, the contents, notes, and case data are displayed in tabs at the bottom of the interaction queue list view.

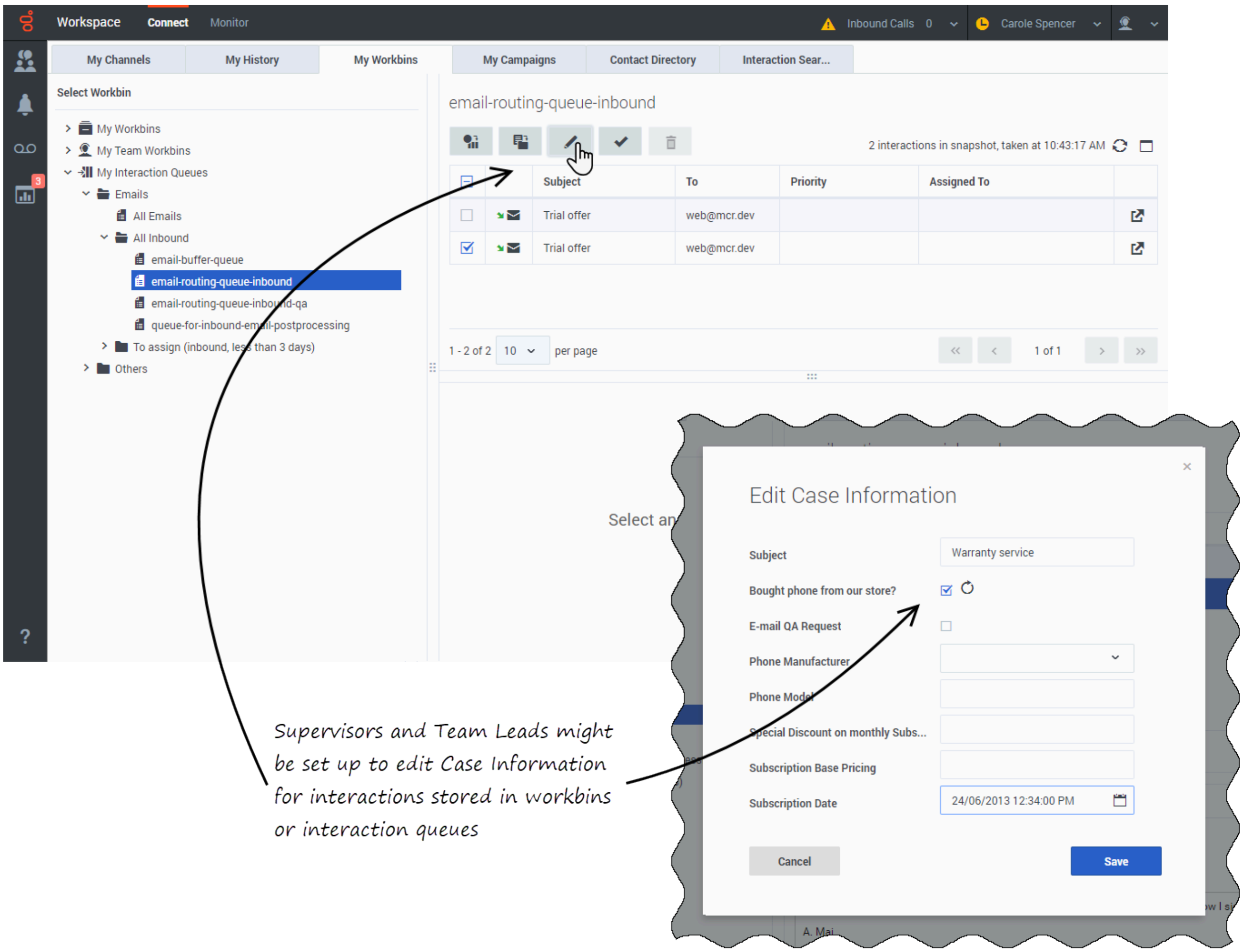
To open an interaction to view or handle it, double-click it or click **Open**.



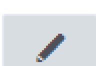
Controls are displayed at the top of the interaction queue view that let you perform actions on the interaction that you mark. Mark interactions by clicking the check box next to them. The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have marked:

- **Done**  marks the interaction(s) as Done.
- **Delete**  deletes the interaction(s).
- **Move to Queue**  moves the interaction(s) to a different interaction queue
- **Move to Workbin**  moves the interaction to the workbin of one of the agents that you supervise, or to one of your own workbins.
- **Edit Case Information**  opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the marked interaction(s).

How do I edit Case Information for interactions in Workbins and Queues?



Supervisors and Team Leads might be set up to edit Case Information for interactions that are stored in a Workbin or Queue.

: Mark an interaction to enable the Edit Case Information icon.

Click the icon to open the Edit Case Information dialog box. The editing features of this dialog box work the same as the editing features of the Case Information area of an interaction window.

You can edit case information for multiple interactions by marking two or more interactions. The following rules apply to editing the case information of multiple interactions:

- The Edit Case Information dialog box displays a mix of all of the case information fields that are available in all of the marked interactions.

- Only the common editable fields, check boxes, and menus of the marked interactions are displayed.
- If an editable item has the same value for all of the marked interactions, that value is displayed in the editable field.
- If an editable item has different values for one or more of the marked interactions, the field is displayed as "Mixed Values".
- If you make an edit and you decide to undo it, click the '*Cancel* icon:

What next?

- Calls
- Chat
- Email
- Team Communicator
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Voicemail for Supervisors

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

You can access your voicemail account from the web or from local or remote telephones.

Before you can access your voicemail, you must set up your user profile. Your mailbox comes with a generic standard greeting. If you want to use a personal greeting or an extended absence greeting, you must record it.

Web access requires Chrome, Firefox, or Internet Explorer 9 or 10.

Access your voicemail from a local telephone

Your desktop telephone might have a Message Waiting Indicator (MWI) in the form of a light or an LED display, which indicates that this phone's mailbox has new messages waiting.

To access your voicemail from a telephone connected to your internal telephone system:

1. Press the **voicemail** key, if your phone includes one, or dial the voicemail access number. Your method of access depends upon your specific telephone model.
2. Enter your mailbox number and password, as required. If you are accessing your voicemail for the first time, you must change your password.
3. From the main menu, select from the following options:
   - Press **1** to play new messages. (Messages become old after 1 play.)
   - Press **3** to play old messages.
   - Press **4** to reach the greetings menu.
   - Press **5** to record your name or change your password.
   - Press **6** to access a group mailbox, if available to you. Press **1** and enter a group mailbox number or press **2** to hear a list of all available group mailboxes.
4. Use these commands while any message plays:
   - Press **1** to rewind 10 seconds.
   - Press **2** to pause or resume.

- Press **3** to forward 10 seconds.
- Press **4** to play a voice menu, which lists all commands for listeners.
- Press **5** to hear envelope information about the call, for example: message length (in H:M:S) and Caller ID of sender.
- Press **6** to forward the message.
- Press **7** to delete. (Message is saved if not deleted.)
- Press **#** (number sign) to go to the next message.
- Press ***** (asterisk) to cancel and return to the main menu.

Note: In the Telephone User Interface (TUI), mailboxes can be accessed only with mailbox credentials (mailbox number). Using DN, agent, or user credentials to access mailboxes is not supported.

Access your voicemail from a remote telephone

To access your voicemail from a telephone not connected to your internal telephone system:

1. Dial the voicemail access number. If you have dialed into a group mailbox, you can only play messages.
2. Enter your mailbox number and password. If you are accessing your voicemail for the first time, you must change your password.
3. Press **#** to confirm.
4. From the main menu, select from the following options:
    - Press **1** to play new messages. (Messages become old after 1 play.)
    - Press **3** to play old messages.
    - Press **4** to reach the greetings menu.
    - Press **5** to record your name or change your password.
5. Use these commands while any message plays:
    - Press **1** to rewind 10 seconds.
    - Press **2** to pause or resume.
    - Press **3** to forward 10 seconds.
    - Press **4** to play a voice menu, which lists all commands for listeners.
    - Press **5** to hear envelope information about the call, for example: message length (in H:M:S) and Caller ID of sender.
    - Press **6** to forward the message.
    - Press **7** to delete. (Message is saved if not deleted.)
    - Press **#** (number sign) to go to the next message.
    - Press ***** (asterisk) to cancel and return to the main menu.

Note: In the Telephone User Interface (TUI), mailboxes can be accessed only with mailbox credentials (mailbox number). Using DN, agent, or user credentials to access mailboxes is not supported.

Manage your greetings

Users can manage greetings for their personal mailboxes. Only users who are Group Mailbox Administrators can change greetings and passwords for group mailboxes.

To manage your greetings from a local or remote telephone, press 4 and use these commands:

- Press **1** to record an `extended absence greeting`.
- Press **2** to record a `personal greeting`.
- Press **5** to activate the `standard greeting` that inserts your recorded name into a standard message. For example: You have reached the mailbox of *play_recorded_name*.
- Press **6** to activate your `personal greeting`. Not available or played unless this greeting exists.
- Press **7** to activate your `extended absence greeting`. Not available or played unless this greeting exists.

After initiating each action, follow the audio prompts.

- Press ***** to exit the Greetings menu and return to main menu.

Forward Your Voicemail

1. Press 6.
2. Enter a mailbox number.
3. Press 1.

   The voicemail is forwarded.

Notes

- Press * to cancel at any step.
- You cannot forward an expired voicemail.
- Forwarding a voicemail resets its retention limit in its destination mailbox.

Genesys Softphone

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Genesys Softphone is an application that enables your computer and phone or headset to connect to the public phone system. This section describes how to use the Genesys Softphone.

This article tells you how to use Genesys Softphone on your workstation, including how to start Genesys Softphone, activate and register users, view device and user status, and make and receive calls.

Genesys Softphone in Connector Mode

For most Genesys Engage cloud users, Genesys Softphone is in Connector Mode and starts automatically when Windows starts up, you do not have to start Genesys Softphone yourself.

If you right-click the Softphone system tray icon, you are given one menu option, **Exit**. Selecting this option stops Softphone. You must restart Softphone to enable you to log in to Workspace.

Important

The Genesys Softphone UI described in the Standalone mode section is not available in Connector Mode.

Softphone status indicators

Genesys Softphone displays different icons in the system tray to let users know its status and if there are any warnings or errors.

If you see a warning icon, hover your mouse pointer over the icon to read a tooltip summary of the problem. This tooltip will include the type of protocol your Genesys Softphone is configured to implement: "SIP" or "WebRTC". Specify which type is displayed when reporting an incident to your Administrator.

System tray Softphone status icons

Icon	Condition
	Waiting for agent login
	Agent logged in and Softphone registered
	Activation or registration error
	Headset issue
	Voice quality is currently degraded
	Microphone is muted

Genesys Softphone in Standalone Mode

If your system does not use Connector Mode, you can start the Genesys Softphone by double-clicking the Genesys Softphone shortcut on your desktop or by selecting it in your **Start** Menu.

To open the Genesys Softphone UI, right-click the Genesys Softphone ( ) icon from the Icon Tray and select **Open**.

Softphone status indicators

Genesys Softphone displays different icons in the system tray to let users know its status and if there are any warnings or errors.

If you see a warning icon, hover your mouse pointer over the icon to read a tooltip summary of the problem. This tooltip will include the type of protocol your Genesys Softphone is configured to implement: "SIP" or "WebRTC." Specify which type is displayed when reporting an incident to your Administrator.

System tray Softphone status and warning icons

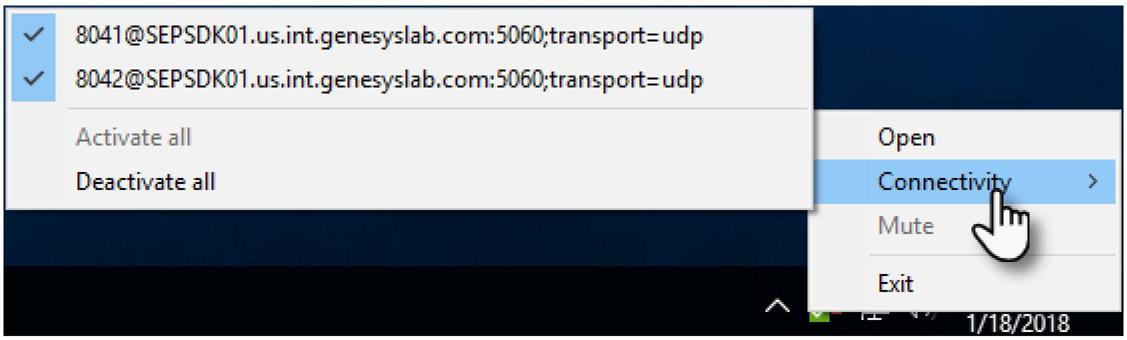
Icon	Condition
	Registered
	Registration error
	Headset issue
	Voice quality is currently degraded

Icon	Condition
	Microphone is muted

Activating and registering the user

When the Genesys Softphone first starts, it reads the user's information from the `Softphone.cfg` file, and automatically registers the user.

To verify that the user is registered, after starting the Genesys Softphone, right-click the Softphone icon from the Icon Tray and hover over the **Connectivity** menu. You can register or un-register a connection by clicking and toggling the check marks. The notification area shows that the Softphone is active and ready to take calls.

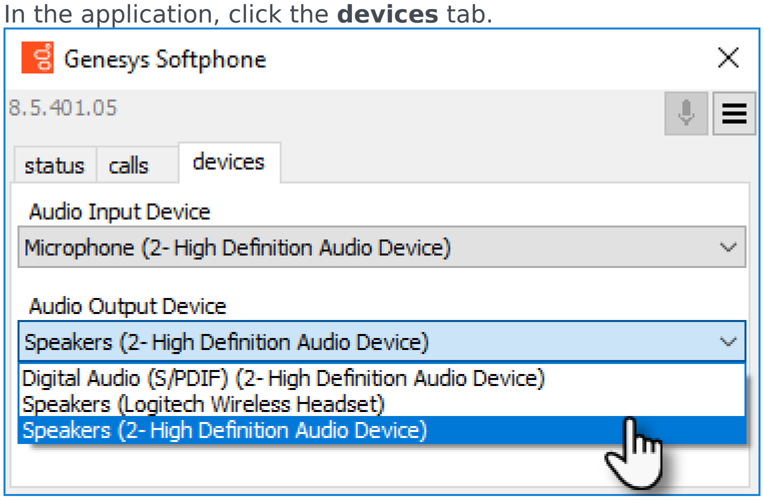


Selecting the input and output devices

The Genesys Softphone configures the input and output devices during start-up when it reads the list of devices from the Softphone.config file. However, if required, the softphone user can change the brand of device used while the Genesys Softphone is running.

To select an input or output device:

1. In the application, click the **devices** tab.

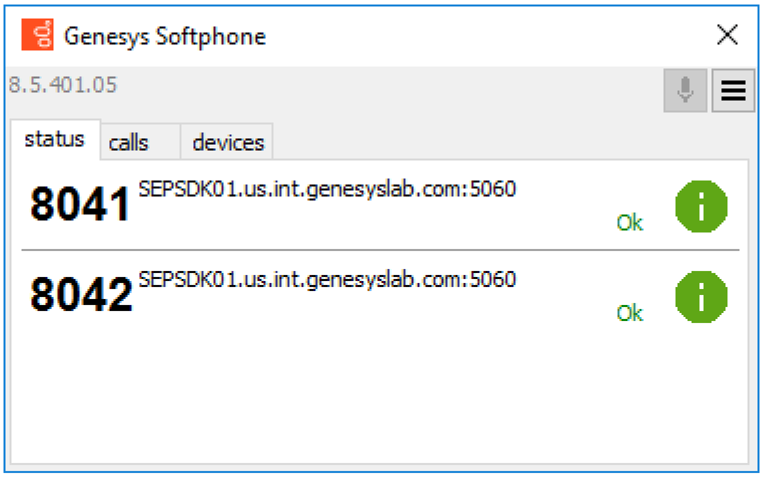


2. Select the appropriate microphone from the **Input Device** drop-down list.
3. Select the appropriate speaker from the **Output Device** drop-down list.

Viewing the Softphone users and status

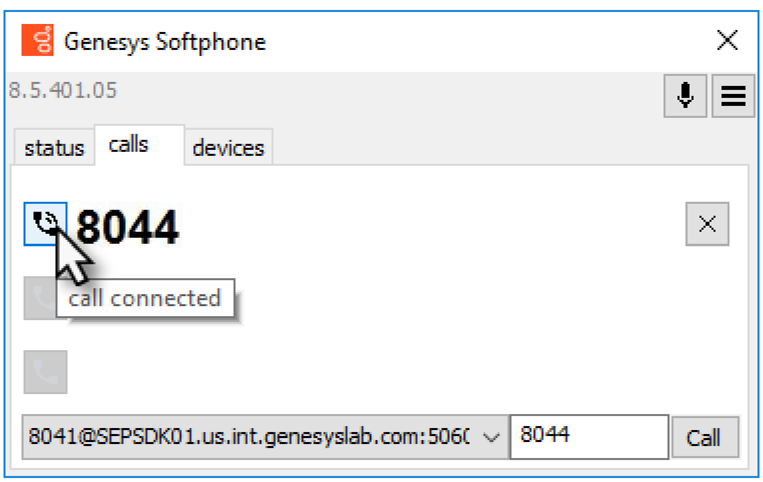
Each Genesys Softphone instance can have up to six SIP user accounts configured.

To view the number of users configured and their statuses, right-click the Softphone icon, and click **Open**. The **Genesys Softphone** window displays. Click the **status** tab.



Making and receiving calls

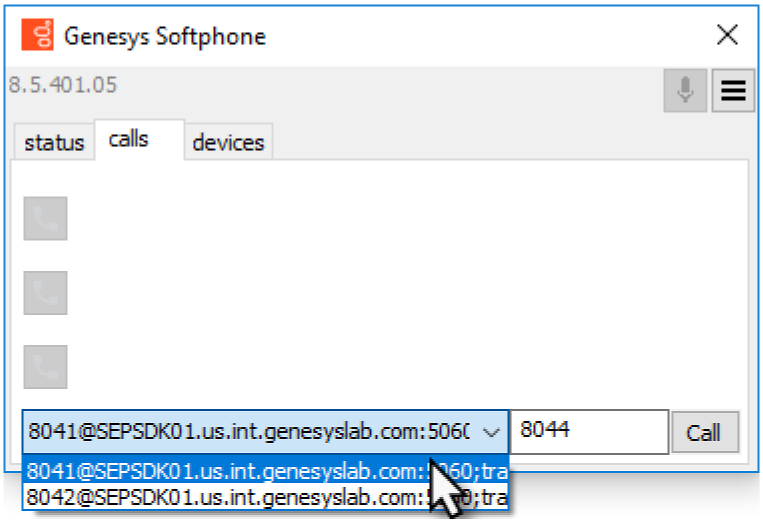
You can make and receive calls from the **calls** tab.



From this tab, you can perform the following operations:

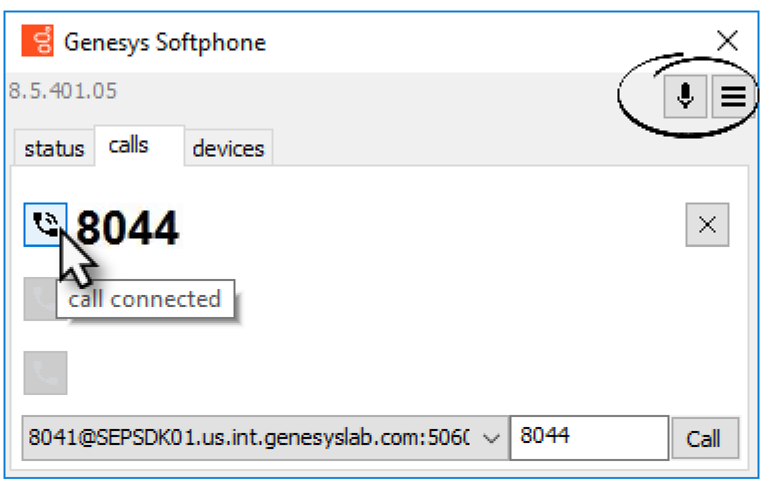
- Answer an incoming call—click the button of an *alerting* call to answer. If you were on another call, that call will be placed on hold.

- Hold a call—when you switch to another call, the currently active call is placed on hold.
- Retrieve a call—click the the line button of a call on hold to retrieve that call.
- Hangup a call—click the hangup button to terminate a call. You can terminate calls that are on hold.
- Dial and make a call—you can make a call by selecting an originating account (connection) from the connections combo box, entering a destination number, and clicking **Call**. Making a new call while another call is active places the existing call on hold.



Muting the microphone

The microphone button shows the current mute status, either muted or un-muted. Clicking the microphone button changes the status.



Mute/un-mute functionality works on the application level and not the system level:

- The mute button is only available when there is an active call.

- Muting the microphone in the Softphone is done on the session level. The mute status does not depend on the selected devices nor on device presence and status. A session may be muted even if a microphone is not plugged in.

You may also mute/un-mute the microphone from the tray icon menu. To mute/un-mute the input device:

1. Right-click the Softphone icon, and click **Mute**.
2. From the same menu, click **Un-mute** un-mute the input device.

> **Important**
>
> The mute menu item is clickable only when the Genesys Softphone is in an active session.

Platform Administration

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Welcome to the Platform Administration Help. This document introduces you to the GUI of Platform Administration and describes concepts and procedures relevant to using Platform Administration in your contact center.

About Platform Administration

Platform Administration introduces the next-generation user interface for Genesys that reduces both the overall operating costs and the time to deployment, by providing user-friendly interfaces that perform complex operations while at the same time preventing user error.

Configuration Manager

Within Platform Administration, Configuration Manager enables you to create and manage system-level configuration object.

The **Configuration Manager** page is a central location for viewing and managing the configuration objects used by your system.

Configuration objects, also known as Configuration Database objects, contain the data that Genesys applications and solutions require to operate in a particular environment. These objects are all contained in the Configuration Database.

Configuration Manager lists these objects by type. For example, configuration objects related to users and their accounts are listed under the **Accounts** heading.

Hover over a configuration object type to view a list of the related configuration objects on your system.

Naming Conventions

[+] Click here to reveal section

Because most objects in the Configuration Database mirror physical objects in your contact center (for example, switches, agents, and installed applications), this document uses an initial capital letter for Configuration Database objects. For example, the word switch appears in lowercase when it refers to a physical switch in your contact center, but it is capitalized when it refers to the configuration object that mirrors your physical switch. Similarly, the word application appears in lowercase when it refers to a physical installation in your contact center, but it is capitalized when it refers to the configuration object that mirrors the installed program.

Common Object Properties

All objects have the following configuration properties and elements:

- **Name**—Names uniquely identify objects within a certain range. Therefore, the name, which can be up to 255 characters, is a required parameter for most types of objects. The exceptions are:
    - DNs and Agent Logins—Their unique numbers and codes identify them within a Switch.

  The way you name objects in your environment is important. Consistent and sensible naming conventions make your configuration environment easier to understand and faster to browse, leading to a more maintainable and usable configuration.

  > **Important**
  > Although Platform Administration supports the full character set in object names, the use of certain characters can cause problems in the behavior of other Genesys applications. Therefore, avoid spaces, dashes, periods, or special characters in object names. Consider using underscores where you might normally use spaces or dashes.

  The names you set for some types of objects must match the names of the entities that those objects represent elsewhere in an environment. For example, the names of Hosts must match the names given to the computers they represent in the data network environment.

- **State Enabled**—If checked, indicates that the entity represented by an object is in regular operating condition and can be used without any restrictions. If not checked, indicates that the entity represented by an object is being used in a non-production environment. Customer interactions cannot be directed to this target, even if operating information indicates that this object is available.

  Disabling a folder or an object that is a parent to other objects also disables all objects within the folder or all child objects of that parent object.

  For example:

    - Disabling an Agent Group folder disables all Agent Groups configured within this folder.

  However, if you disable a group of objects (for example, an Agent Group), the individual members of this group (in this example, Agents) remain enabled.

Accounts

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Accounts section of Configuration Manager enables you to configure the following objects:

- Access Groups
- Agent Groups
- Roles
- Users (Persons)

Access Groups

Important
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Access Groups are groups of Users who need to have the same set of permissions for Configuration Database objects.

In many cases, users fall into a small number of categories with similar access needs. A team of agents all performing the same tasks often has identical access needs. Two or three people responsible for maintaining a specific site of the contact center may also have identical access needs. You can greatly simplify access control by adding individuals to Access Groups and then setting permissions for those groups.

Overview

Display Options

The **Access Groups** list shows the Access Groups that are in your environment.

Important
Access Groups that are disabled will appear grayed out in the list.

To select or de-select multiple objects at once, click **Select**.

Click the name of an Access Group to view additional information about the object.

Change Members

Changing the Members of an Access Group

Changing Access Group Members

To change the members of an Access Group, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Access Groups**.
3. In the **Members** tab, click **Add** to add a User. To remove Users, click the check box beside each User that you want to remove and click **Remove**.
4. When you are done, click **Save**.

Agent Groups

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

An Agent Group is a logical grouping of Agents. Agent Groups are typically set up to provide particular sets of contact-center services.

Overview

Display Options

The **Agent Groups** list shows the Agent Groups that are in your environment.

> **Important**
> Agent Groups that are disabled appear grayed out in the list.

To select or de-select multiple objects at once, click **Select**.

Modify

Modifying Agent Group Objects

> **Important**
> You must have sufficient permissions assigned by your Administrator to view and modify Agent Groups.

To modify an Agent Group object, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Agent Groups**.
3. Select an Agent Group from the list and click **Edit**.

You have the ability to:

- Change the name of an Agent Group.
- Manage Supervisors for an Agent Group.
- Assign Agents to an Agent Group.
- Manage Origination DNs for an Agent Group.

Enabling or Disabling

Enabling or Disabling Agent Groups

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Agent Groups**.
3. Click the check box beside each Agent Group that you want to enable or disable.
4. Click **More**. In the pop-up menu, select **Enable** to enable the selected Agent Groups, or select **Disable** to disable the selected Agent Groups.
5. A dialog box appears to confirm the action. Click **OK** to continue.

Agent Skills

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Overview

Display Options

The **Skills** list shows the Skills that are in your environment.

> **Important**
> Skills that are disabled will appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

To select or de-select multiple objects at once, click **Select**.

Add/Remove

Add or Remove Skills for an Agent

To add or remove skills for an Agent's profile, perform the following actions:

1. In the header, click **Configuration**.

2. Under the **Accounts** heading, click **Persons**.
3. Select the Agent to be modified.
4. Select the **Skills** tab.
5. Add or Remove skills for this agent.
6. Press **Save**

Roles

Important

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Roles define what you can do in a given application. In Platform Administration, roles and their privileges are controlled by the use of Role objects, which are assigned to Users (including Agents) and Access Groups. Roles are application-specific, and must be defined for each application that supports them.

Overview

Display Options

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

To select or de-select multiple objects at once, click **Select**.

Users (Persons)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The **Persons** window is a central location for creating, provisioning, and managing user accounts.

Users are the contact-center personnel, including agents, who need access to Genesys applications. Agents are users who handle customer interactions directly.

Overview

User (Persons) list

The **Persons** list shows the Users that are in your environment. You can quickly distinguish between Users and Agents by looking at the icon to the left of the object name.

> **Important**
> Users that are disabled appear grayed out in the list.

To filter the contents of this list:

- Click **Show Quick Filter** and type the name or partial name of an object in a Quick Filter field.

  After you click **Show Quick Filter**, the following buttons are available:

  - **Group By**—Group objects by various criteria.
  - **Column Picker**—Select which columns to display in this list.

- Click a column head to sort items in the list alphabetically. Click the column head again to reverse the sort order.
- To select or de-select multiple objects at once, click **Select**.

Procedures

Possible Procedures

To create a new User, click **New**. To view or edit details of an existing object, click the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a User.
- **Move To**—Move a User to another folder.
- Enable or disable Users.
- Create a folder.

> **Important**
> When a User is either disabled or removed, Platform Administration invalidates all sessions that are associated with this User. Upon the User's next action, he or she will be redirected to the login page.

Click the name of a User to view additional information about the object.

Creating User accounts

To create a user account, perform the following steps:

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Persons**.
3. In the **Persons** window, click **New**.
4. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - **User Name**—Enter the email address of the user.
    - **Agent**—A check box that you can select to indicate that this User is an Agent. If selected, additional fields appear.
    - **First Name**—The first name of the User.
    - **Last Name**—The last name of the User.

- **E-mail Address**—The email address of the User.
- **Employee ID**—A code of up to 64-characters that identifies this User within the contact-center staff. You must specify a value for this property and that value must be unique.
- **Password**—A password no longer than 64-characters that this User must use to log in to the environment. You cannot view the existing password. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if **Reset Password** is not selected.

> **Important**
> Passwords can be subject to format rules.

- **Confirm Password**—Confirmation of the password entered. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if **Force Password Reset on Next Login** is not selected.
- **Force Password Reset on Next Login**—A check box that, if selected, will prompt the User to enter a new password upon the next login.
- **External ID**—This setting applies only if your environment is using external authentication, either LDAP or RADIUS. This may be the user name in the external authentication system. For LDAP, it might be a whole, or partial, LDAP URL corresponding to RFC 2255.
- **Tenant**—N/A
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

5. If **Agent** is selected, enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from the following list:
    - **Default Place**—The Place assigned to this Agent, by default. This optional parameter applies to a limited number of configurations, in particular those where a real-time association between a Place and an Agent cannot be established through a telephony login procedure.
    - **Capacity Rule**—N/A
    - **Cost Contract**—N/A
    - **Site**—N/A
6. In the **Member Of** tab, click the **Add** button to add an Access Group.
7. If **Agent** is selected, click the **Apply** button to display the following tabs.
    - In the Skills tab, click the **Add** button to add a Skill.
    - Enter the following information in the pop-up window that displays on your screen:
        - **Skill**—The Skill assigned to this Agent.
        - **Level**—The relative measure of the Agent's proficiency in this Skill.
    - In the **Agent Logins** tab, click the **Add** button to add an Agent Login.
    - Enter the following information in the pop-up window that displays on your screen:
        - **Agent Login**—The Agent Login code assigned to this Agent. You cannot assign an Agent Login

to more than one Agent.

- **Wrap-up Time**—N/A

8. Click the **Save** button.

Passwords

Setting and Resetting Passwords

There are multiple methods to change or reset a password. Choose a procedure below:

Resetting a Password for a Single User

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Persons**.
3. In the **Persons** window, click the name of the user for whom to reset the password. A new window opens.
4. In the new window, select **Force Password Reset on Next Login**.
5. Click **Save**.

> **Important**
> The **Force Password Reset** button is grayed out if the password has already been flagged to be reset by the User. It remains grayed out until the User logs in and clears the flag by resetting the password.

Specifying a New Password for a Single User

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Persons**.
3. In the **Persons** window, click the name of the user for whom to change the password. A new window opens.
4. In the new window, type a new password in the **Password** field and confirm the password by typing it in the **Confirm Password** field.
5. Click **Save**.

Routing/eServices

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Routing/eServices section of Configuration Manager enables you to configure the following object:

- Business Attributes

Business Attributes

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Business Attributes are objects that serve as containers of a particular type for Attribute Value objects. Instances of this object are available enumerations (classifications), such as Media Type, Service Type, and others.

Important

Business Attribute names and values may be stored using UTF-8. This enables the attributes and their values to be entered and displayed in any language, including non-ASCII languages such as Japanese. If required, two or more languages can be combined for a single Business Attribute.

Overview

Business Attributes Overview

The **Business Attributes** list shows the Business Attributes that are in your environment.

Important

Business Attributes that are disabled appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Environment

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Environment section of Configuration Manager enables you to configure the following object:

- Scripts

Scripts

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Scripts identify processing scenarios or treatments that can be applied to customer interactions. For example, an Alarm Reaction Script specifies how to react when an Alarm Condition is triggered.

> **Important**
> Depending on the application type, a scenario or treatment itself might be part of the Script object, in which case it is listed in **Options** tab of the Script object.

Display Options

Display Options

The **Scripts** list shows the Scripts that are in your environment.

> **Important**
> Scripts that are disabled will appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Switching

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Switching section of Configuration Manager enables you to configure the following objects:

- Agent Logins
- DNs
- DN Groups

Agent Logins

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Agent Logins are unique codes defined within a Switch and assigned to agents. They identify which Agent is working at which Place during a particular working session.

The configuration of Agent Logins in the Configuration Database must match exactly the configuration of those Agent Logins in the switching system. Before adding or deleting a particular Agent Login, make sure that the same change was made in the database of the switching system.

When you specify Agent Logins as objects in a Switch, they are not associated with any particular agents. For information about how to assign Agent Logins to Agents, refer to Assigning Agent Logins to Agents.

Overview

Agent Logins Overview

The **Agent Logins** list shows the Agent Logins that are in your environment.

> **Important**
> - The **Switches** list displays when you select **Agent Logins** in Configuration Manager. To access the **Agent Logins** list, you must first select a Switch object and then an Agent Logins folder.
> - Agent Logins that are disabled appear grayed out in the list.

To select or de-select multiple objects at once, click **Select**.

Procedures

Possible Procedures from this Panel

To create a new Agent Login object, click **New**. To view or edit details of an existing object, click the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

> **Important**
> When you delete an Agent Login, the Agent Login is removed from the Configuration Database and from any Agent to which it is assigned. This might affect the configuration of a particular Agent in the contact center. Before deleting an Agent Login, consider viewing the dependencies tab to identify the Agent to which this Login is assigned. If you want to remove only the Agent Login from the Agent to which it is assigned, but leave it still existing in the Configuration Database and available for assignment to another Agent, open the User Account for the Agent, remove the Agent Login from the Agent, and click **Save**.

Otherwise, select the check box beside one or more objects and click **More** to perform the following tasks:

- **Clone**—Copy an Agent Login.
- **Move To**—Move an Agent Login to another folder.
- Enable or disable Agent Logins
- Create a folder.

Click the name of an Agent Login to view additional information about the object.

Creating Agent Login Objects

To create an Agent Login object, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Switching** heading, click **Agent Logins**.
3. The **Switches** list displays.
4. Click the Switch object in which you wish to create an Agent Login.
5. Click the Agent Logins folder in which you wish to create an Agent Login.
6. Click **New**.

7. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:

- **Code**—The Agent Login code. You must specify a value for this property, and that value must be unique within the Switch. Once you set the value, you cannot change it.
- **Switch**—The Switch to which this Agent Login belongs. This value is automatically set, based on the Switch being viewed in the **Agent Logins** list.
- **Override**—N/A
- **Switch-specific Type**—N/A
- **Password**—N/A
- **Confirm Password**—N/A
- **Tenant**—N/A
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

- Click **Save**.

DNs

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

DNs are communication devices, uniquely identified by their directory numbers (DNs), where customer voice interactions reside and are handled.

Because most types of DNs represent the actual devices of the telephone system, their specification in the Configuration Database must always correspond to their Switch settings. Remember that Platform Administration has no way of verifying this correspondence.

As a general rule, changes made to DN configurations in the Configuration Database must always follow the changes made to DNs within the telephone system, and never the other way around.

Overview

Display Options

The **DNs** list shows the DNs that are in your environment.

Important

- The **Switches** list displays when you select **DNs** in Configuration Manager. To access the **DNs** list, you must first select a Switch object and then a DN folder.
- DNs that are disabled appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Procedures

Possible Procedures from this Panel

To create a new DN object, click **New**. To view or edit details of an existing object, click the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

> **Important**
> When you delete a DN, it is removed from the Configuration Database and from any DN Group of which it is a member. If you want to remove only the DN from a DN Group of which it is a member, but leave it still existing in the Configuration Database and available for assignment to another DN Group, you must remove it from the DNs tab of the DN Group.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a DN.
- **Move To**—Move a DN to another folder.
- Enable or disable DNs.
- Create a folder.

Click the name of a DN to view additional information about the object.

Creating DN Objects

To create a DN object, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Switching** heading, click **DNs**. The **Switches** list displays.
3. Click the Switch object in which you wish to create a DN.
4. Click the DN folder in which you wish to create a DN.
5. Click **New**.
6. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - **Number**—A directory number assigned to this DN within the Switch. You must specify a value for

this property, and that value must be unique within the Switch for all DN types. Once you set the value, you cannot change it.

- **Type**—The type of the DN. This value must be set to **Extension**.
- **Switch**—The Switch to which this DN belongs. This value is automatically set, based on the Switch being viewed in the **DNs** list.
- **Association**—N/A
- **Register**—N/A
- **Alias**—N/A
- **Route Type**—N/A
- **DN Group**—The DN Group to which this DN belongs.
- **Override**—N/A
- **Login ID**—N/A
- **Switch-specific Type**—N/A
- **Number of Trunks**—N/A
- **Tenant**—N/A
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

7. Click **Save**.

DN Groups

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

DN Groups are logical groupings of DNs. You can use DN Groups in network-level routing algorithms and in some types of statistics.

Although a DN Group can contain DNs that belong to a number of different Switches, you can receive correct statistical information about this DN Group only if the reporting applications connect to the servers associated with those Switches.

Overview

Display Options

The **DN Groups** list shows the DN Groups that are in your environment.

> **Important**
> DN Groups that are disabled appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Agents

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Agents are Users who handle customer interactions directly. The **Agents** window lists all Agents in your environment (or Tenant, if you are in a multi-tenant environment). You can only see those objects for which you have access.

You can filter the contents of this list in several ways:

- Click **Show Quick Filter** and type a search term in the **Quick Filter** field. The list updates dynamically to show items that match the text in the **Quick Filter** field.
- Click **Show Column Filter** to show search fields for each column header. Enter a search term in one of these fields to quickly search the column for the search term.
- Click the cube icon to open the **Tenant Directory** window. In this window, click the Tenant that you want to select. Use the **Quick Filter** field to filter the Tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Creating an Agent

To create a new Agent, click **Add** in the Platform Administration **Agents** window.

[+] Show Procedure

Procedure: Creating an Agent

Purpose: To create an Agent in the **Agents** window.

Steps

1. Click **Add**. The **Add Agent** window appears.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - User Information
        - **User Name**—The name that this User should use to log into the environment. You must specify a value for this property, and that value must be unique within the Configuration Database.
        - **First Name**—The first name of this User.
        - **Last Name**—The last name of this User.
        - **External ID**—This setting applies only if your environment is using external authentication, either LDAP or RADIUS. This may be the user name in the external authentication system. For LDAP, it might be a whole, or partial, LDAP URL corresponding to RFC 2255.
        - **Email**—The email address of this User.
        - **Employee ID**—A code of up to 64-characters that identifies this User within the contact-center staff. You must specify a unique value for this property.
        - **Password**—A password no longer than 64-characters that this User must use to log in to the environment. You cannot view the existing password.

            > **Important**
            > Passwords can be subject to format rules.

        - **Organization**—The folder in which the Person object for this User is stored.
        - **Default Number**—The phone number of this User. This field is used to create the associated DN, Place, and Agent Login objects for this User. Platform Administration uses existing objects, if available.
    - Skills
        - You can add Skills to the Agent by:
            - Selecting an existing Skill—In the **Skills** section, select existing Skills from a list to add to the Agent. To select a Skill, click the check box beside the Skill and enter a numerical value in the **Rating** field.
    - Agent Groups
        - You can add the Agent to an Agent Group by clicking the check box beside an item in the list.

3. Click **Save**.

> ### Important
> When adding an Agent in **Hidden** mode, Platform Administration also makes the following configuration changes:
>
> - Create Agent Logins in each Switch, using information that was entered in the **Default Number** field.
> - Create the User object and associate Agent Logins to the User object. **Wrap-up Time** for each Agent Login is set to `0`.

Other Actions

Once you select an Agent, you can:

1. Edit Agent Information—Select an Agent and click **Edit** to edit Agent information. If you edit the **Default Number** field:
   - If this field is emptied, the Agent is disassociated from the current Place and its Agent Login objects are emptied.
   - If a new value is given, the agent is associated with a new Place, DN, and Agent Login that match the value. New objects are created, if they do not already exist. Existing objects are emptied and not deleted.
2. Copy an Agent—Select an Agent and click **Clone** to make a copy of the Agent object.
3. Change State—Select an Agent and click either **Enable** or **Disable** to change the state of an Agent.

> ### Important
> - Agents that are disabled appear grayed out in the list.
> - When a User is either disabled or removed, Platform Administration invalidates all sessions associated with this User. Upon the User's next action, he or she will be redirected to the login page.

To delete one or more Agents, click the check box beside the Agent(s) in the list and click **Delete**.

Important

When deleting an Agent, Platform Administration does not delete the DN, Place, or Agent Login objects assigned to the Agent.

Gplus Adapter User Guide (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Welcome to the *Gplus Adapter User Guide*. This guide provides all the information you need to start working with the adapter in your environment.

The Gplus Adapter can be implemented in two different options:

- **Gplus Adapter for Salesforce** is a soft phone that can be embedded in your Salesforce sales or service console or be accessed in a separate window that is launched from a **Phone** icon. The standard adapter has a fixed size and therefore the features and functionality is designed for a small screen space.
- **Gplus Adapter for Salesforce - Agent Desktop** is an enhanced soft phone that has a larger window size and thus provides many of the same features and functionality as the Genesys Workspace Agent Desktop.

Click any of the topics below for details.

Gplus Adapter for Salesforce

This chapter explains the features and functionality of this product.

Getting Started

Handling an Incoming Call

Chatting with a Customer

Gplus Adapter for Salesforce - Agent Desktop Option

This chapter explains the features and functionality of this product.

Gplus Adapter for Saleforce - Agent Desktop Option

Gplus Adapter for Salesforce (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

As an agent, you'll be handling calls and making sure that you keep on top of your KPIs. Gplus Adapter is your softphone for handling calls (both inbound and outbound) and other interactions, such as chat or emails. The softphone is launched from your Contact management or ticket management system.

> **Important**
> What you see in the adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

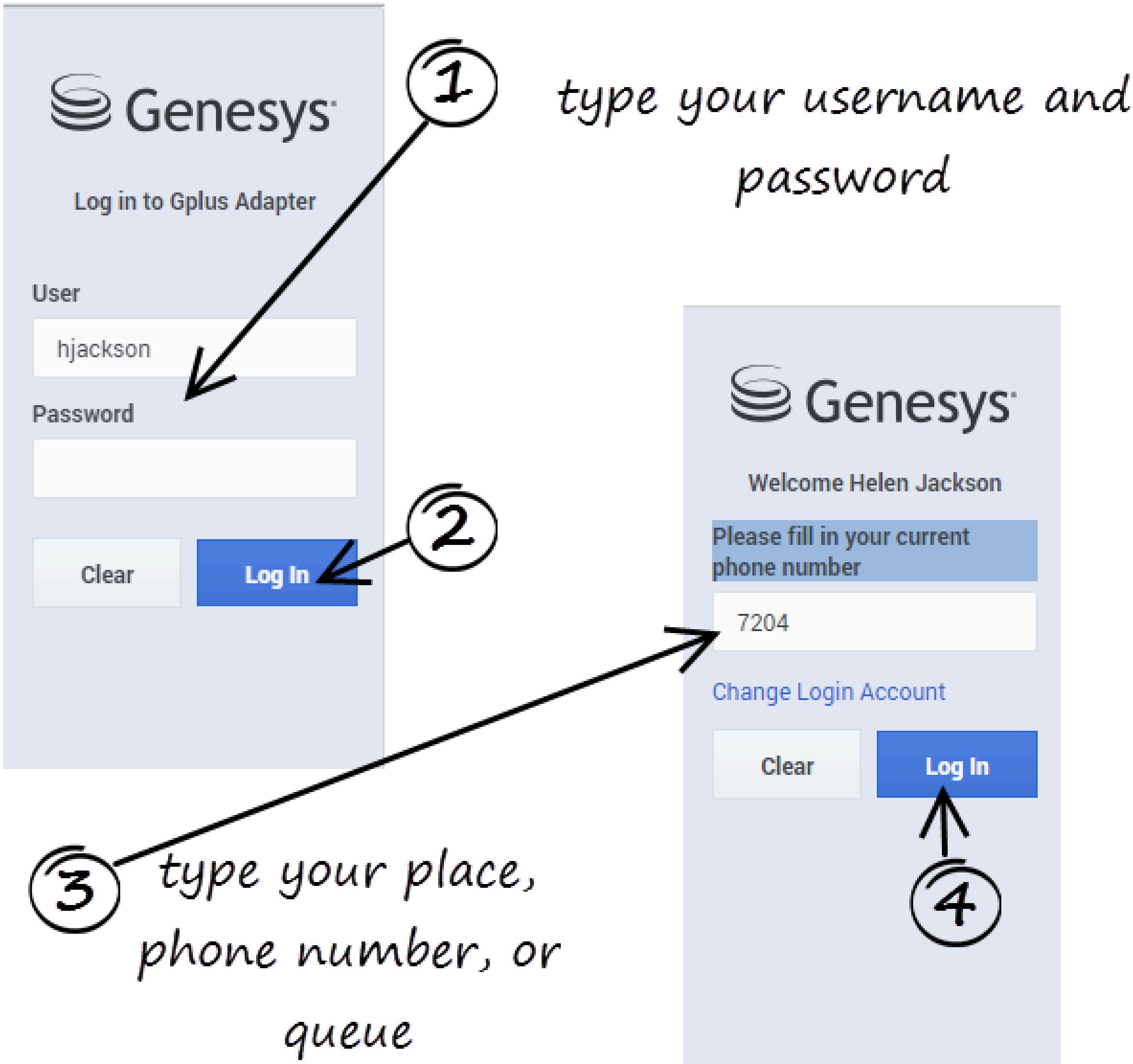
To get quickly up and running with your Gplus Adapter for Salesforce, see Getting Started.

Getting started (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Now that you know what the Gplus Adapter is, you’re probably wondering how to use it. Let’s get started.

How do I log in?

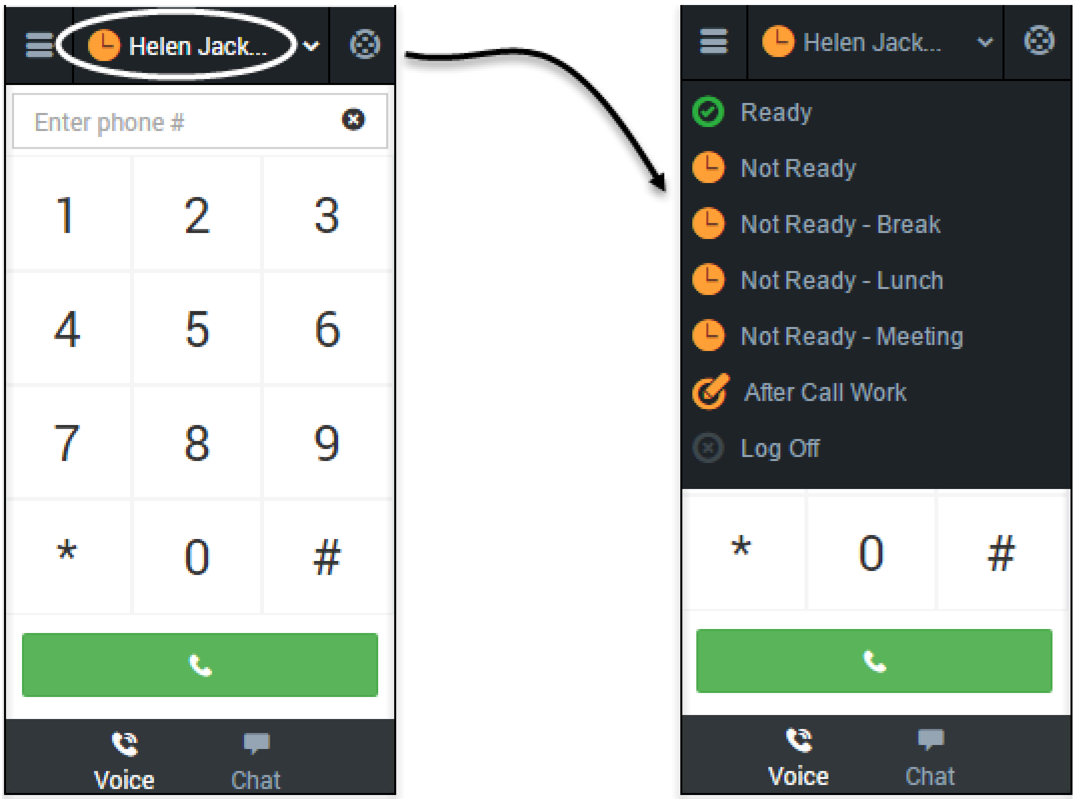


Open a browser (if your system uses a web-based phone, use Chrome) and enter the link for the CRM or ticket application that your supervisor gave you. The Adapter is either in the left pane or you can launch it by clicking **Phone** in the bottom right corner of the screen—it's one or the other, depending on how your administrators have configured the CRM.

Depending on how your administrator has configured the adapter, you might also see a secondary login page where you're prompted to enter the name of a place, a phone number, or enter a queue.

See Logging in for more details.

How Do I Start Taking Calls?



Typically, your status will be **Not Ready** after you log in. Keep in mind that your administrator might have configured your status to be set to **Ready** after login, so it is a good idea to check your status.

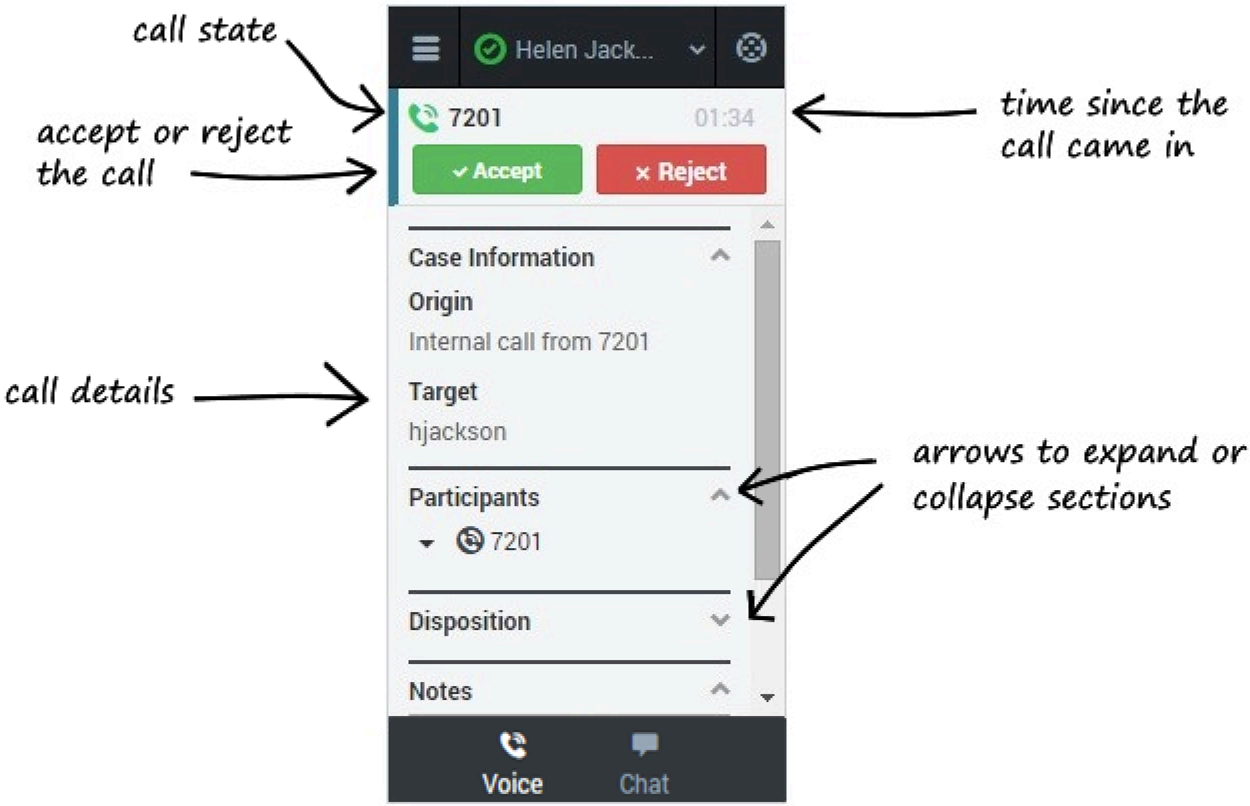
You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the adapter. You can also hover over the status with your mouse to see more details about login time, phone number, overall state, and media channel state.

You can update your status on all channels that you are logged into or update your status on a single channel:

- To update your overall status, click the agent status bar, and select a new status.
- To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

For more information about changing your status, including a video that demonstrates how to do it, see Changing your status.

How do I handle customer interactions?



When a call, chat, or email is directed to you, you'll receive a "toast" pop-up in the bottom right-hand corner of your screen. You might also hear a sound.

To answer it, click **Accept**. (If you do not accept, it will go to the next available agent and your status will change to **Not Ready**.)

- Go here to learn about handling **calls**.
- Go here to learn about handling **chats**.

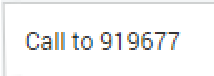
To get you started, here are some common call handling features:

 places the caller on **hold**.

 **restores** the call.

 instantly **transfers** the call to a contact that you select.

 **ends** the call.



calls back the participant that is disconnected from the active call. You can call back a disconnected participant by using the Participants drop down.

Your organization might require you to note a reason for the call (or a *disposition*). If so, after the call is complete, click **Disposition** and select one of the items from the list. Then you can click **Mark Done** to complete the interaction.

Depending on how your organization is set up, you might now enter an **After Call Work** state. This is a period of time during which you would remain in a **Not Ready** state to allow time for completing other tasks related to the call. When this period ends, you automatically return to a ready state and can again receive calls.

Logging in (v8)

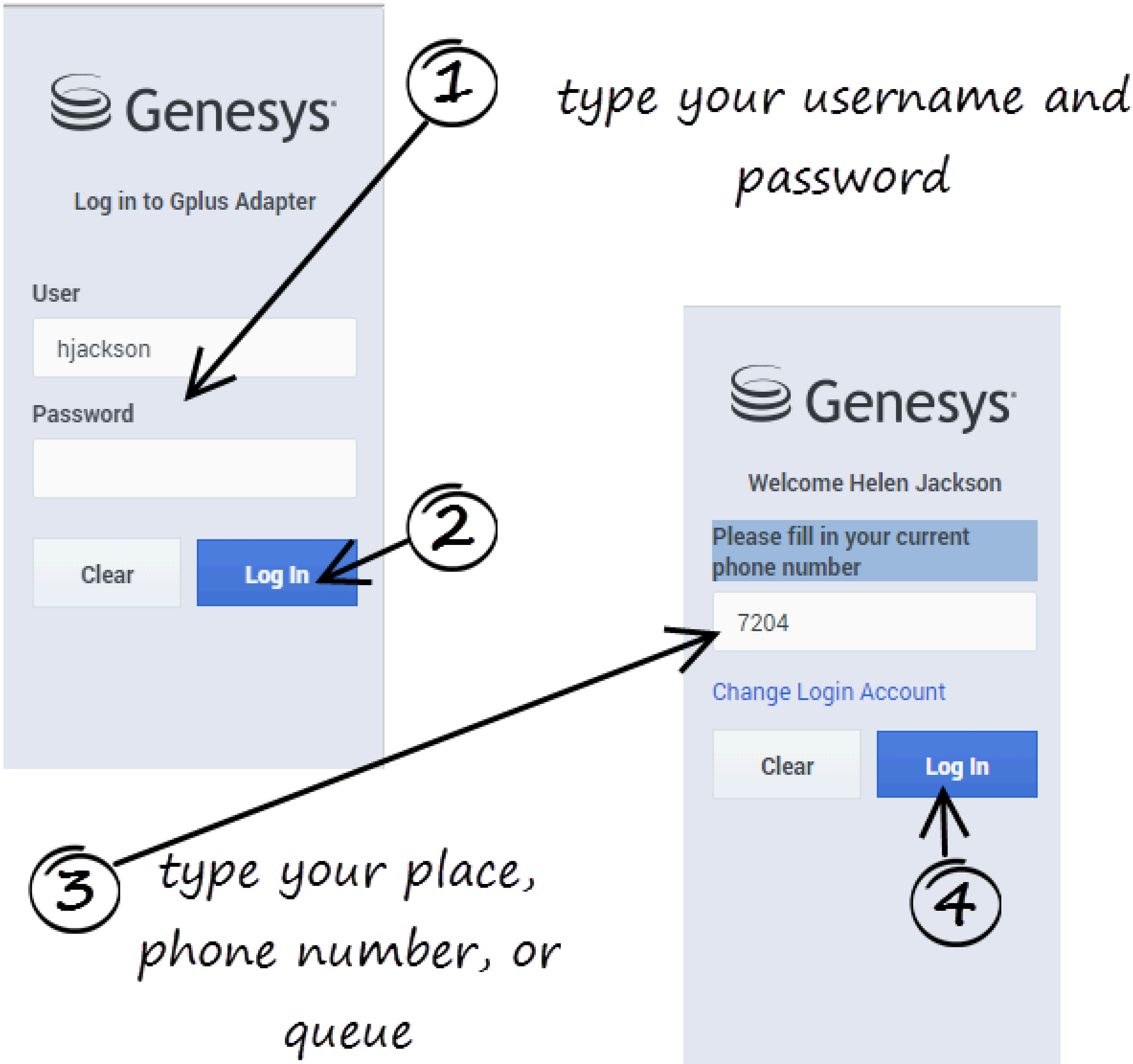
Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The adapter is either in the left pane or you can launch it by clicking **Phone** in the bottom right corner of the screen—it's one or the other, depending on how your administrators have configured the CRM. If your CRM is configured for single sign-on, you don't need to log in into your Gplus Adapter. When you launch the Adapter, you should have immediate access. If your CRM isn't configured for single sign-on, you are prompted to log in.

If your Adapter is located in the bottom right of the screen, you can also undock the Adapter by clicking the arrow at the top right of the Adapter. This opens the Adapter in a new browser window that you can resize and drag to a new location. If you want to redock the window, just click the arrow again and the window returns to the standard location.

How do I log in to the Adapter?

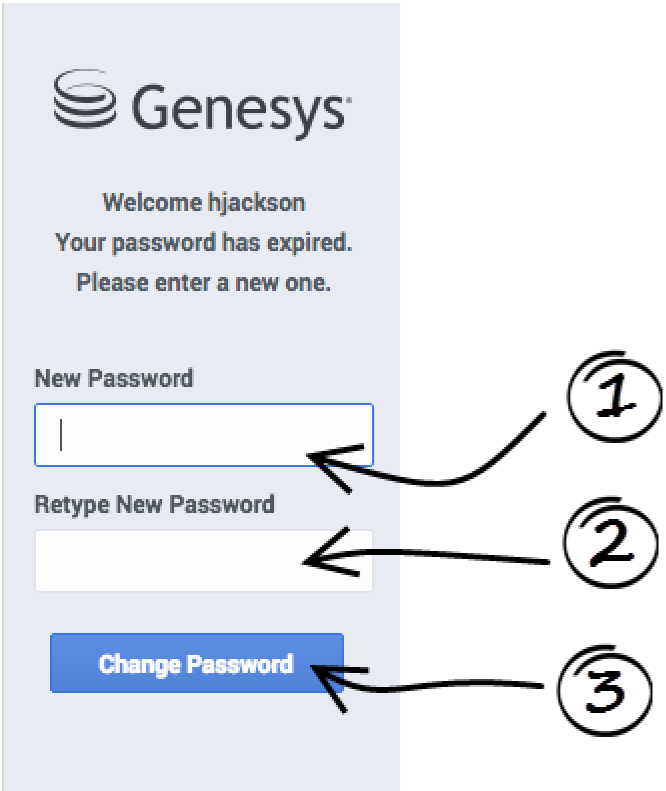


If you are prompted to log in, enter your Genesys username (such as an email address) and password and click **Log In**. If you have logged in before, your username should already be entered for you.

Depending on how your administrator has configured the adapter, you might also see a secondary login page where you're prompted to enter the name of a place, a phone number, or enter a queue.

If you have logged into the Adapter before, the login page automatically inputs your last known place. Most often, you can accept the last known place. If you have changed your place, phone number, or queue, you must update the field before you click **Log In**.

Changing your password



If your password has expired, you are prompted to change your password.

If needed, contact your administrator for password rules.

Adapter main view

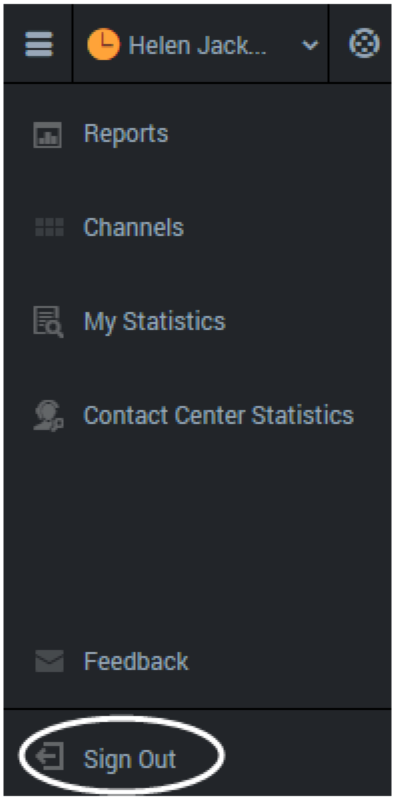
After you log in, the main view is displayed. From this view, you can change your status, navigate among your channels, and make a call by using Team Communicator or the **Dial Pad** tab.

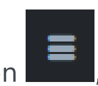
When you first log in, notice that your agent status is set for you — for instance, it could be **Not Ready**. The default state is determined by your system administrator. If your status is not already set to ready, change your status to **Ready**.

Tip

After refreshing the page or after a call is completed, you must click anywhere within Salesforce or the adapter. If you don't, screen pops may fail to occur.

Logging out

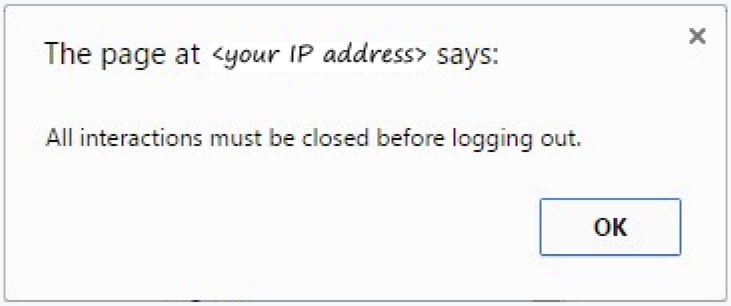


To log off all channels and sign out of Gplus Adapter for Salesforce, click the menu button , and then select **Sign Out**. The adapter returns you to the login page, where you can enter your credentials again, if needed.

When you log out, all interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

Tip

You can't sign out if you have any active calls. If you try, the following error message is displayed. You must click **OK** before you can continue working with the adapter.

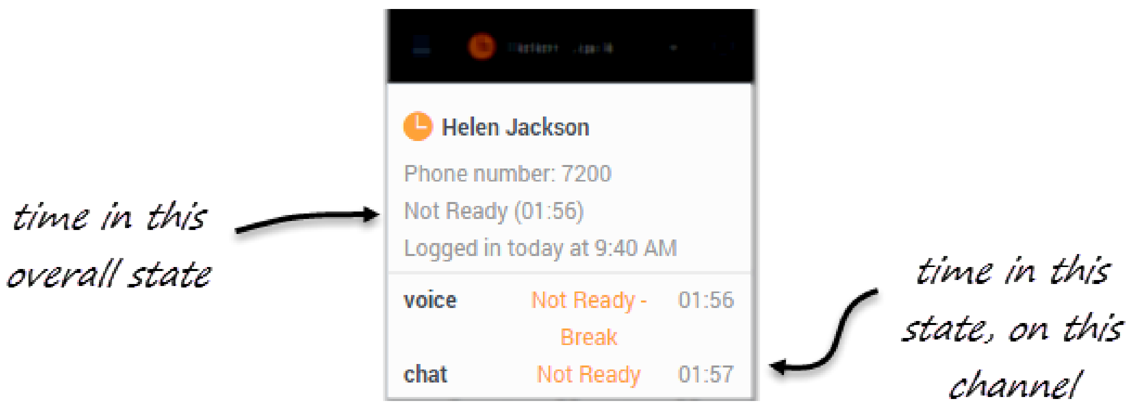

The page at <your IP address> says:
All interactions must be closed before logging out.
OK

Changing Your Status (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the adapter. You can also hover over the status with your mouse to see more details about login time, phone number, overall state, and media channel state.



The following video gives you a demonstration on how to change your status on a particular channel:

[+] Show video: Updating your agent status on a channel

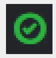
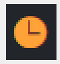
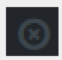
Link to video

Status choices

When you change your status, you choose from a list of states set by your administrator. Generally, you'll see **Ready**, **Not Ready**, and **After Call Work**, but you could also see variations of these options with specific reasons.

Here's a table to describe at the status choices you might see in your adapter:

[+] Show table

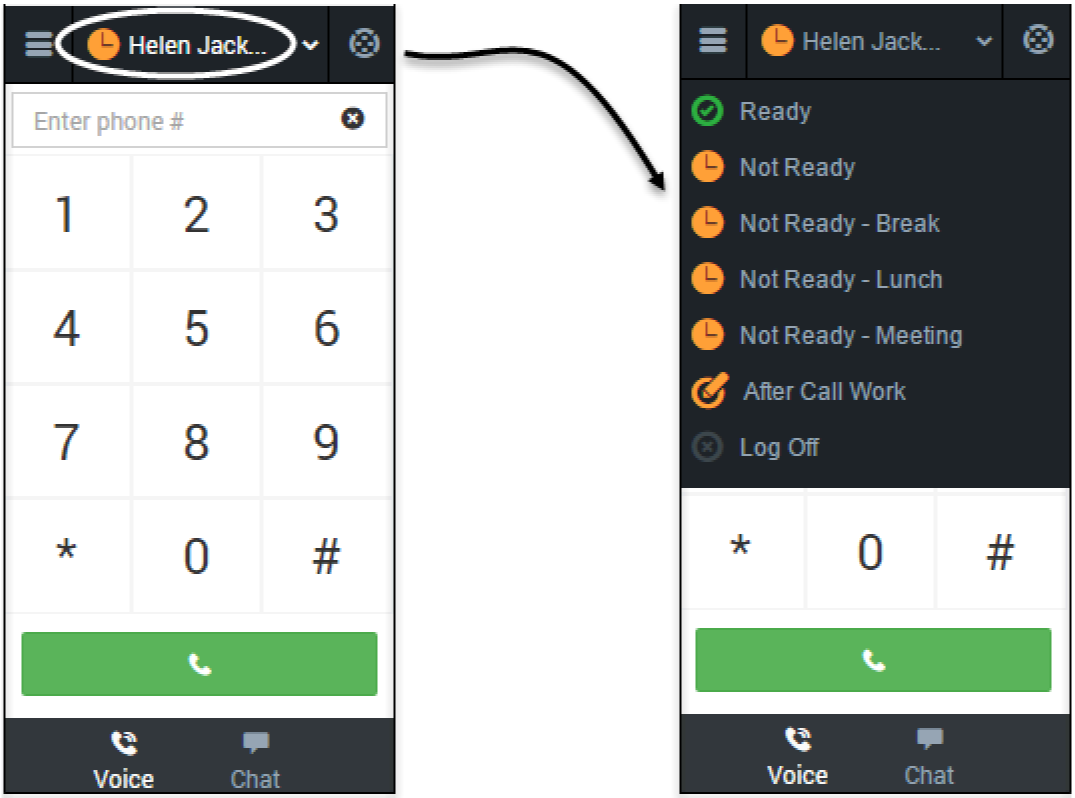
Status	Icon	Description
Ready		You're ready to start accepting calls.
Mixed status		Your status is **Not Ready** on at least one of your logged-in channels.
Not Ready		You're not ready to accept calls. You might also see options such as **Not Ready - Lunch**.
After Call Work		You're not ready to accept calls because you're completing some admin duties for a previous call. You might also see options such as **After Call Work - Verification**.
Log Off		Log off all channels. You can log off all channels on your adapter and still remain logged into the adapter.

Tip

Your environment might be configured to automatically change your status:

- When a call ends, your status might be set to **After Call Work** .
- When you click **Mark Done**, your status might be changed from **After Call Work** to **Ready**, **Not Ready**, or some other value, .

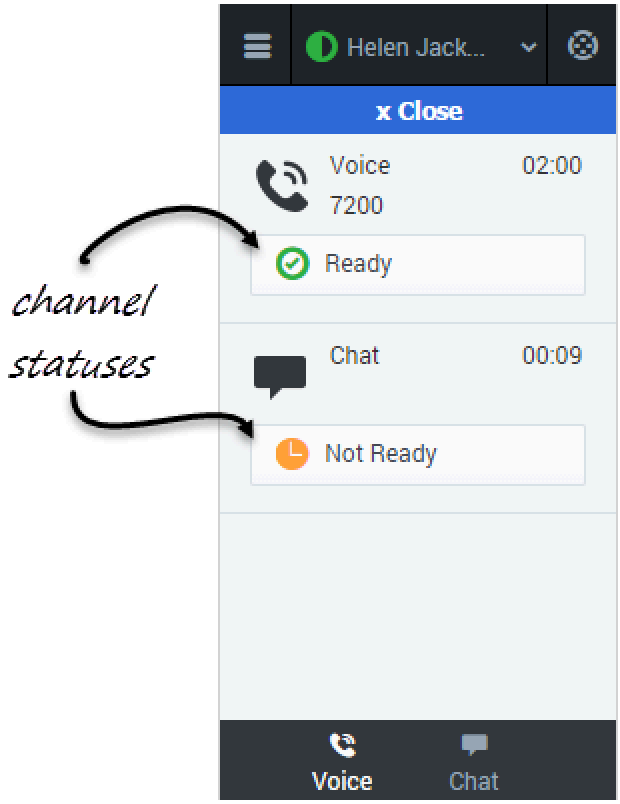
Updating your overall status



If you're logged in to multiple channels, selecting a new status from the status bar changes the status across all channels. Your overall agent status only considers the status of the channels that you are logged into. For example, if you are logged into the voice channel and in **Ready** state, but not logged into the chat channel at all, your global agent status indicates that you are in a global **Ready** state.

To update your overall status, click the agent status bar, and select a new status.

Updating your status on a single channel



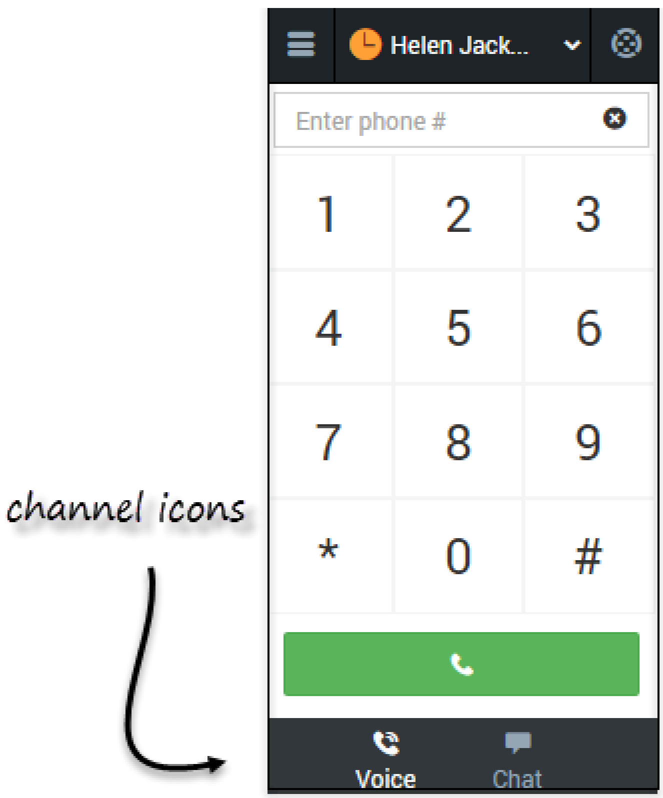
To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

Navigating to a Channel (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

You can navigate to a different media channel in the Gplus Adapter for Salesforce by selecting the channel icon at the bottom of the adapter.



You can also view details about all your channels through the main menu: click **Channels** to see the list of channels that you're configured to use. You can use channel list to change your status on a particular channel.

Handling calls (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

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).

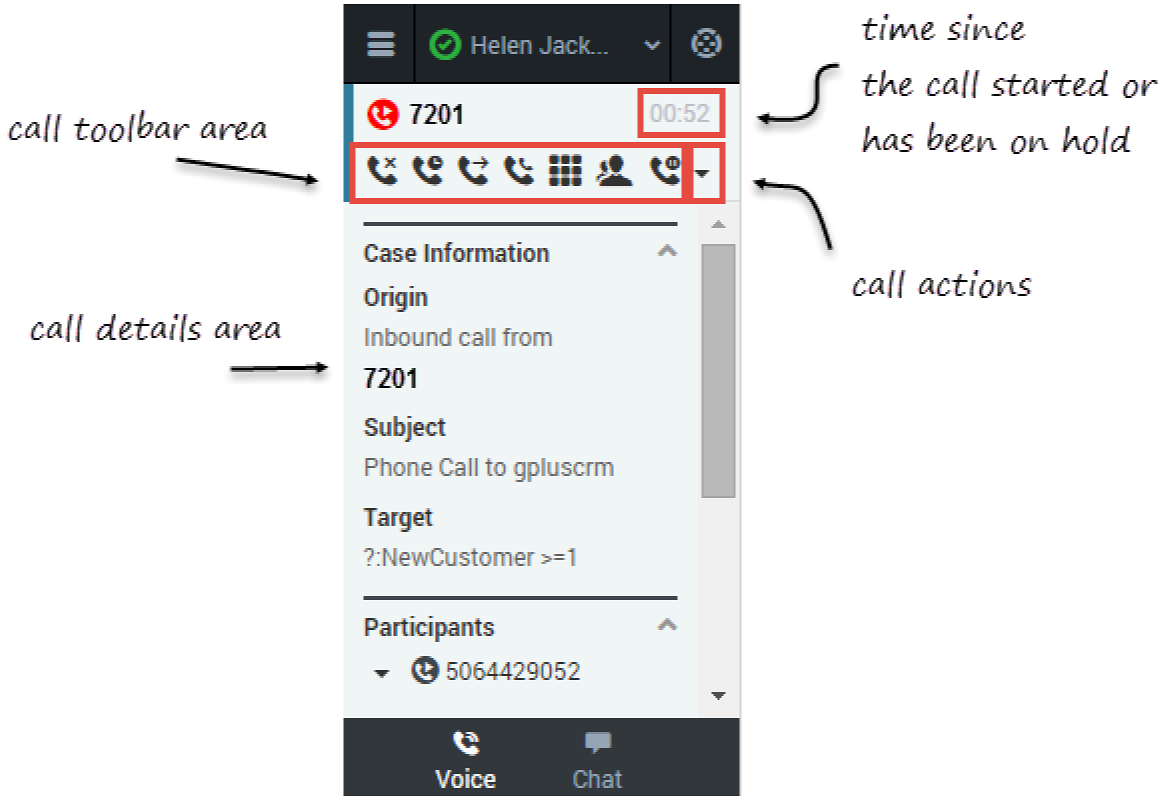
How do I handle calls in the adapter?

Link to video

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

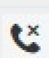
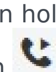
- Handle an incoming call
- Dial a call
- Transfer a call
- Perform an instant conference call
- Initiate a consultation
- Call back a disconnected party
- Record a call

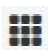
Adapter Main View



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.

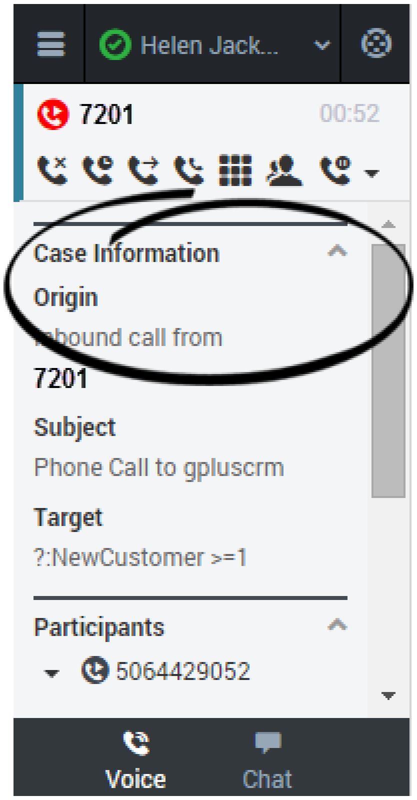
Icon	Description
	Redirects the call to another contact you select using Team Communicator. See Transferring a Call for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
	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.
	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.

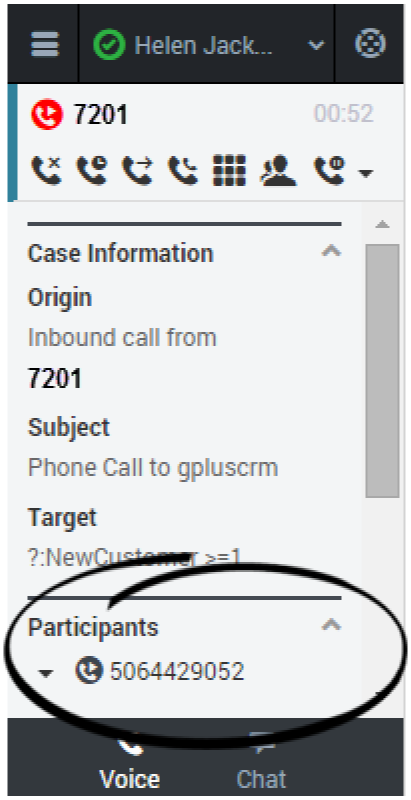
Here are a few examples of some information you might see in your call view:

- 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.

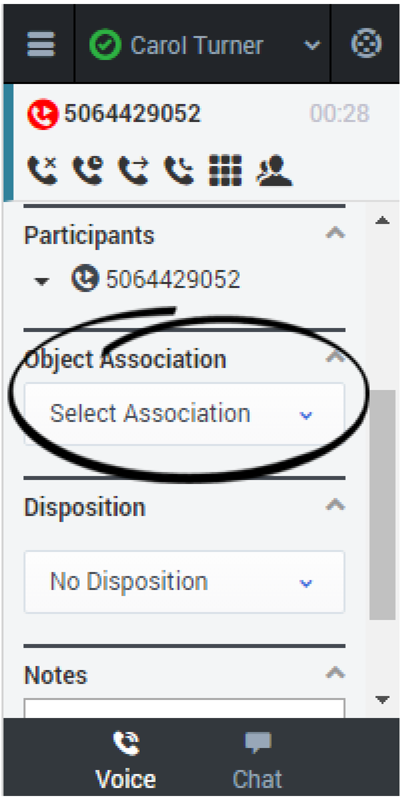
Participants



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 that was disconnected from the current call. To call back, expand the **Participants** drop down, hover over the participant number and click the **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.

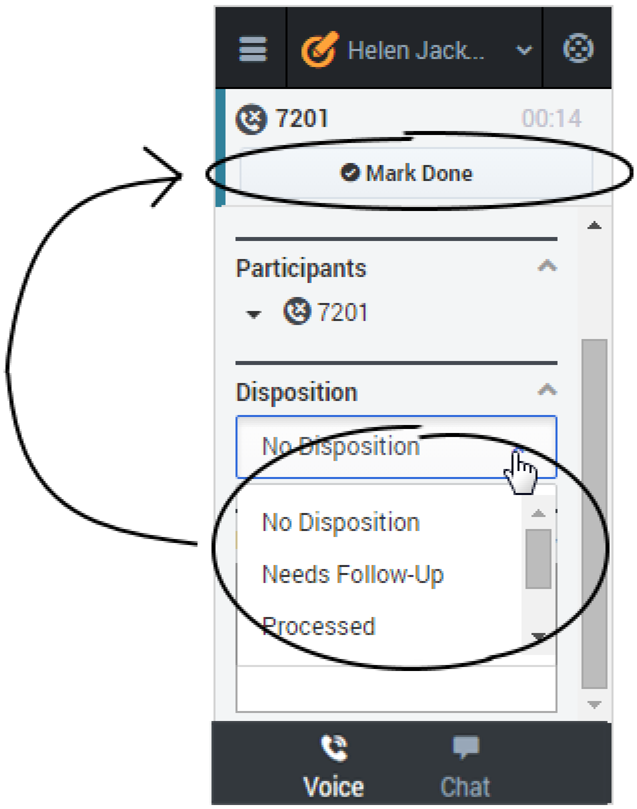
To understand the connection between the **Object Association** menu and Salesforce objects, consider this scenario:

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

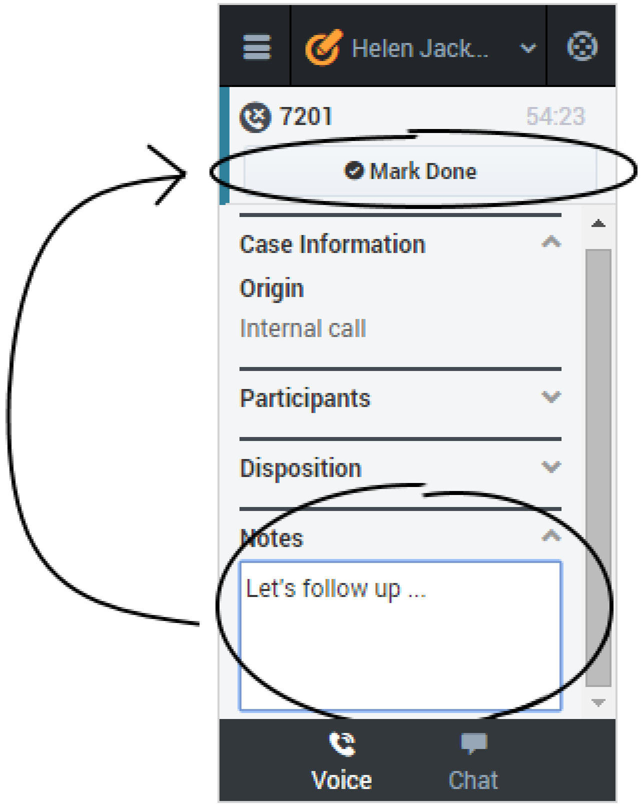
- If your contact center does not permit you to edit case data, the **Object Association** menu is not displayed.
- Avoid opening the Adapter in multiple browser tabs. Object association works only in a single browser tab.

Disposition



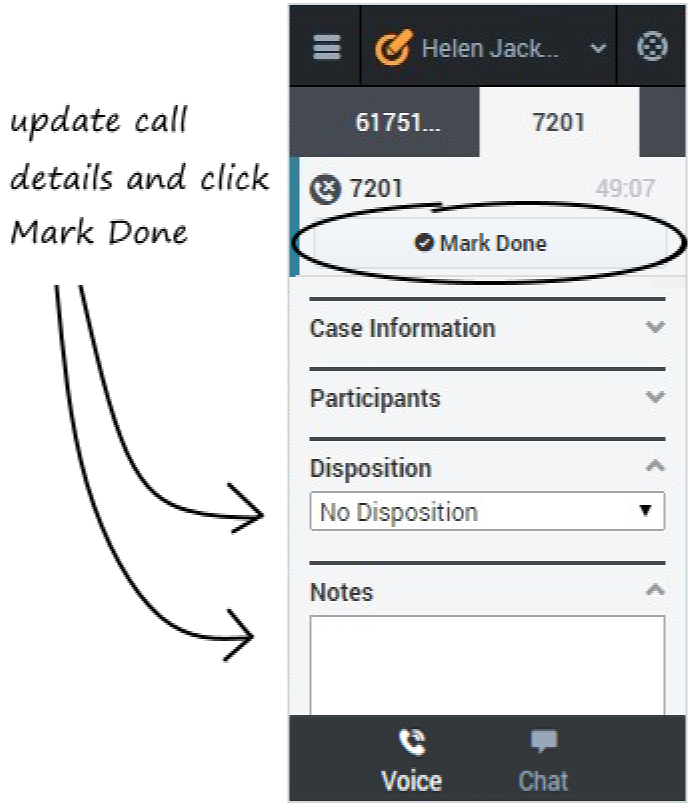
If configured by your administrator, you can change the disposition for a call either during the call or as part of your after-call work. You can use this field to record the business outcome of the call. To update, click the drop-down list, and then select a disposition. Ensure that you don't click **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.

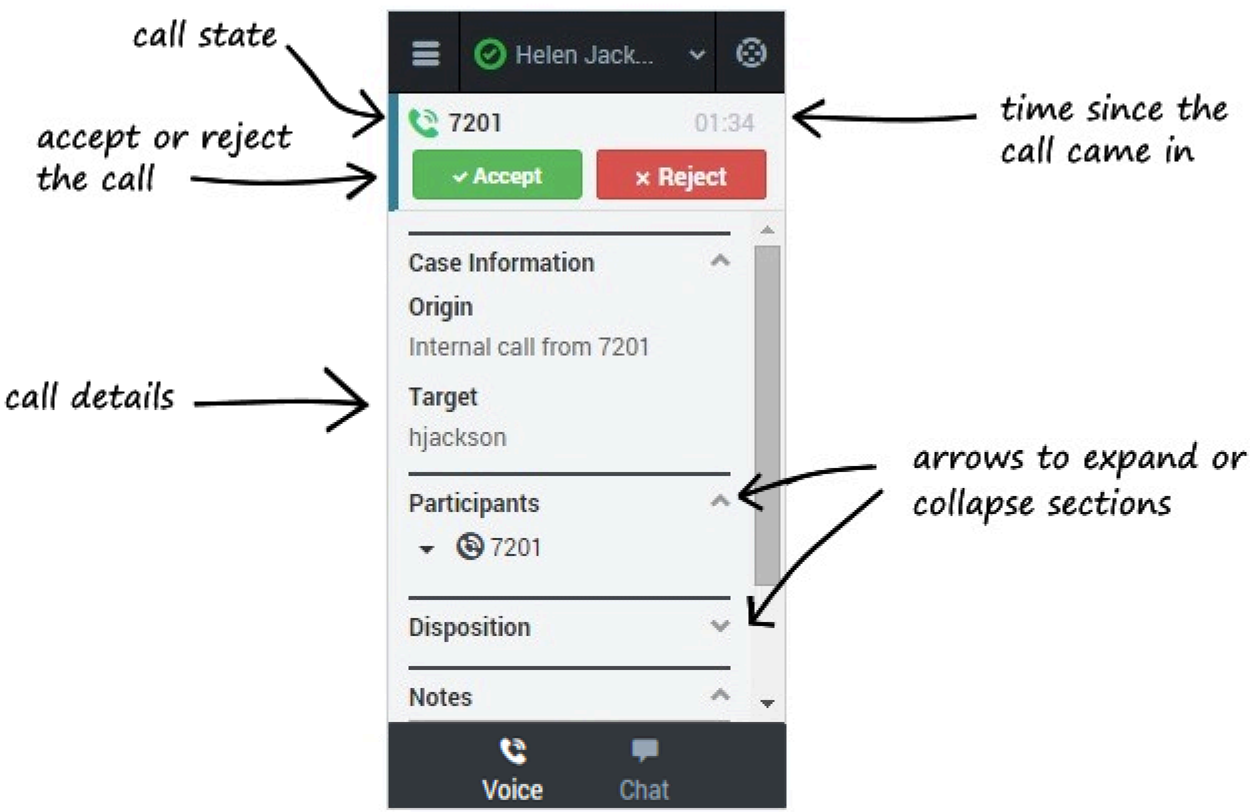
Answer incoming calls (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

You can start receiving calls as soon as you set your status to **Ready** on the voice channel in the Gplus Adapter for Salesforce.

How do I accept a call?



When you get a call, the adapter's incoming call screen displays. You can **Accept** or **Reject** the call, see the amount of time since the call came in, and see the call's state. You also see the call details area, which displays sections for Case Information, Participants, Disposition, and Notes. You can review this information before deciding whether to accept or reject the call. Take a few moments to identify the components of the incoming call screen.

Another visual indicator that you have calls waiting is a red circle with a number displayed on the **Voice** icon at the bottom on the adapter. The number indicates how many invitations are pending. This is useful for when incoming calls are waiting for you while you are on another screen in the adapter or working in another channel.

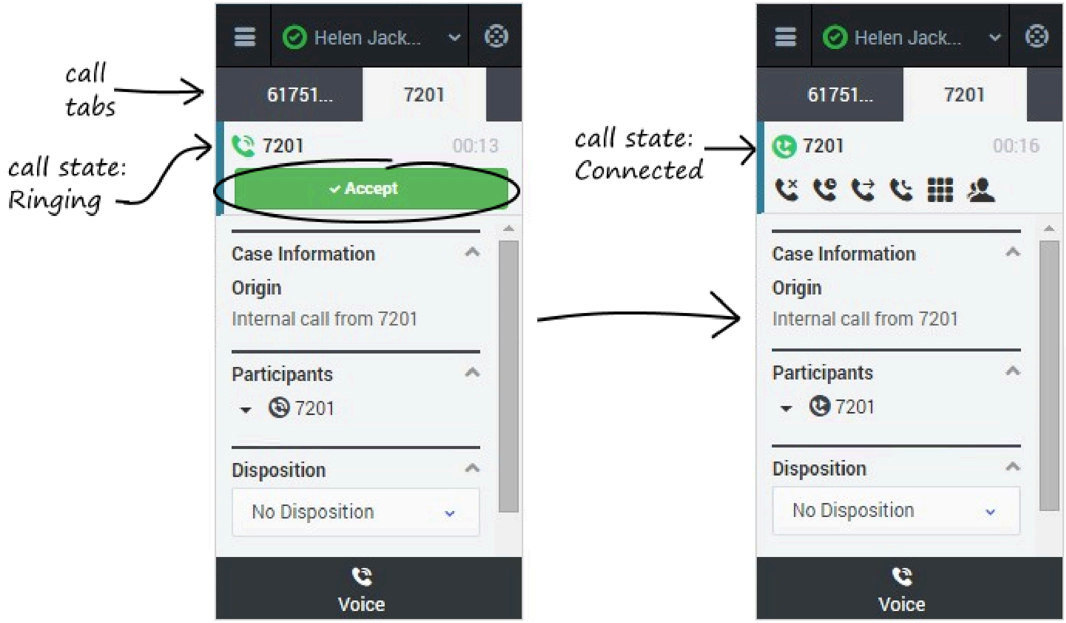
If you reject the call, you'll be taken back to the main view for the voice channel. If you accept the call, you'll see a list of Call Actions you can take in the call toolbar area.

Important

If your administrator has configured it, you might also see related information about the caller in Salesforce. This information might be displayed either while the call is ringing or after you click **Accept**. For example, if the caller already exists in the Salesforce contact database, you might see the Edit Contact screen.

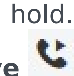
You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

How do I accept a second call?



While you're on an active call, you might get another unrelated direct call from someone else. If this happens, the adapter opens a new tab and shows you the same call overview information with the option to accept.

> ### Tip
> You don't see **Reject** in this scenario because rejecting a call puts it back in the system so it can be routed to another available agent. We don't want that to happen if someone is trying to call you directly.

As soon as you accept the new call, the adapter puts your original call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  —this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

Dial a call (v8)

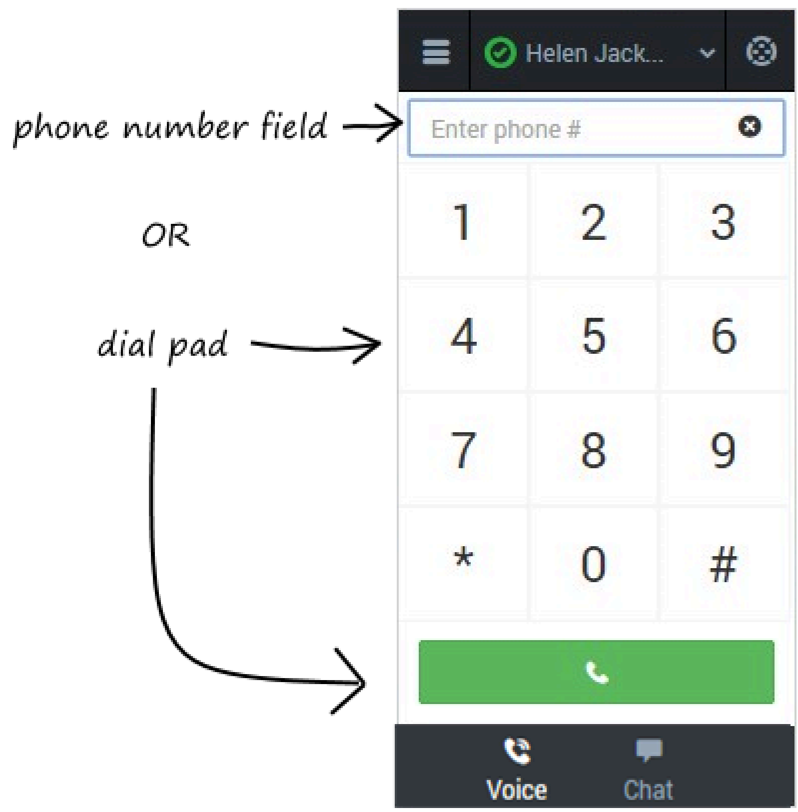
Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

You can use the Gplus Adapter for Salesforce to make calls to contacts by using the dial pad, using Team Communicator, or using click-to-dial.

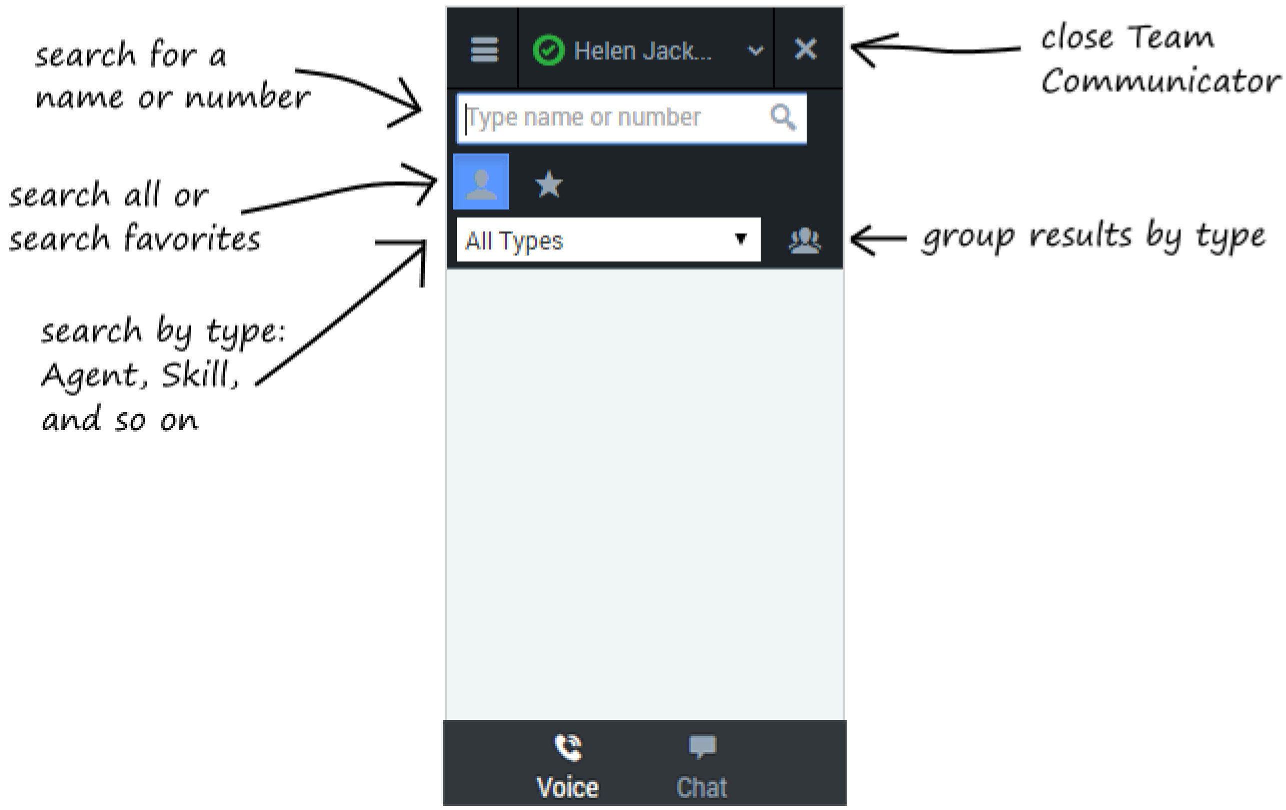
In some contact centers, you can choose a Caller Identification to be displayed on the phone of the contact that you are calling.

Using the dial pad



Making a call by using the dial pad is simple—just click the numbers you want to dial (or enter them manually in the phone number field) and click **Dial**.

Using Team Communicator



Team Communicator is a powerful tool you can use to search for contacts within your organization or outside your organization and then start a call with that contact. The types of contacts that are available to you in Team Communicator are configured by your administrator — you might not see all the fields and buttons that are described in this section. Your administrator might have added some commonly-used contacts to your favorites list, but you can also add your own favorites.

To open the Team Communicator, click **Team Communicator** .

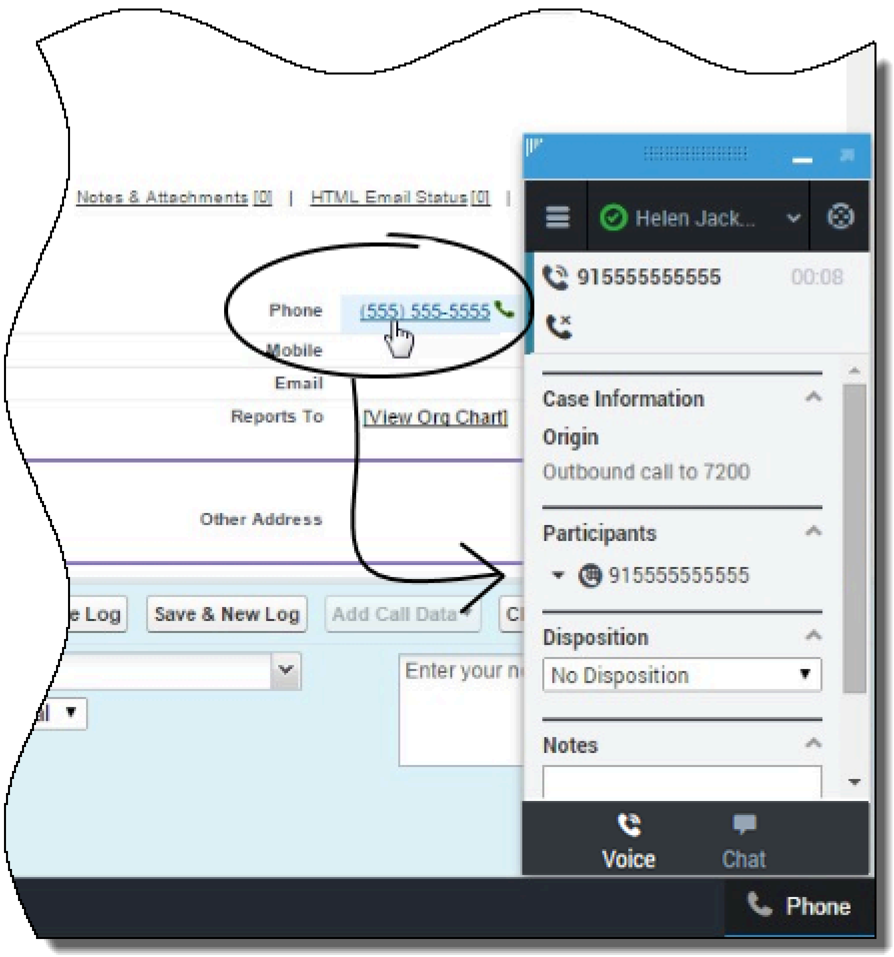
There are many ways to use Team Communicator:

- The simplest is if you know the number of your contact, then you can type it in the text area and press **Enter** on your keyboard to immediately start a call.
- You'll probably use Team Communicator primarily to search for contacts. To get started, just type a name in the text area — as you type, Team Communicator suggests known agents, contacts, and other resources. You can also group your results according to type by clicking **Show Types** . You can collapse these groups by selecting the arrow next to the group name.

- You can also search through your favorites, configured by your administrator, to find a contact to call.
- Finally, you can search for contacts by Skills, Groups, and so on, which can be helpful when you need to call any agent with a particular skill—for example, you might need to transfer a call to an agent who speaks a particular language.

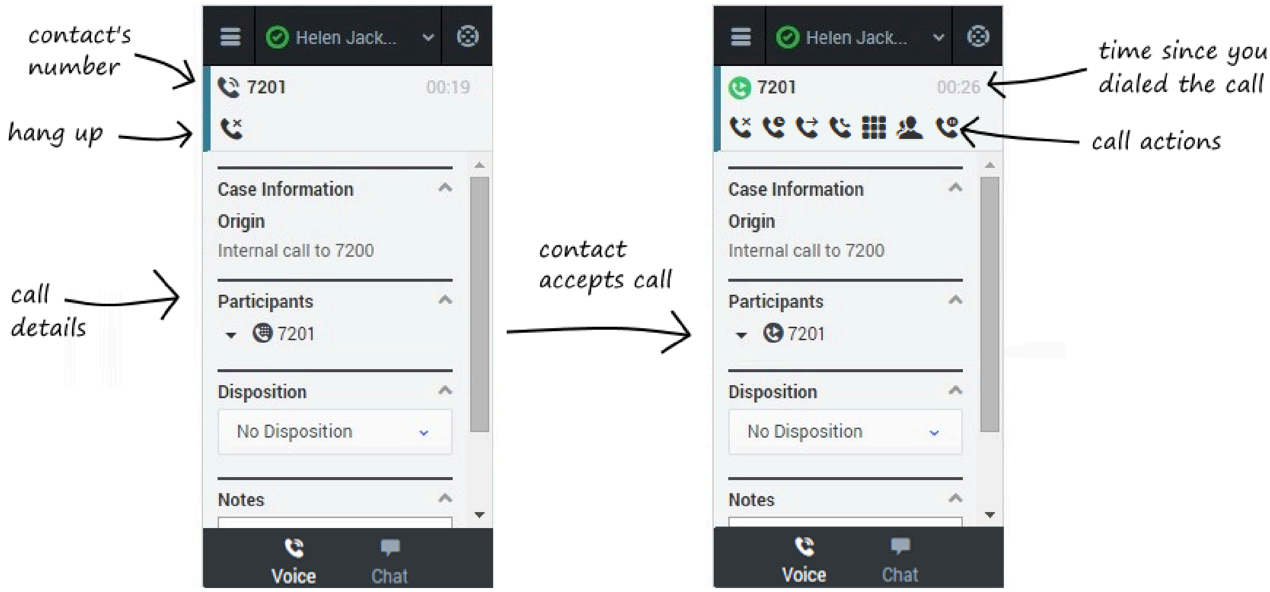
When find a result that you want to contact, just click **Call** next to the name and your call will start.

Using click-to-dial



With click-to-dial, all you have to do is click a phone number within Salesforce and the adapter automatically dials it and starts the call. For example, you might search for a contact in Salesforce and then click the related phone number.

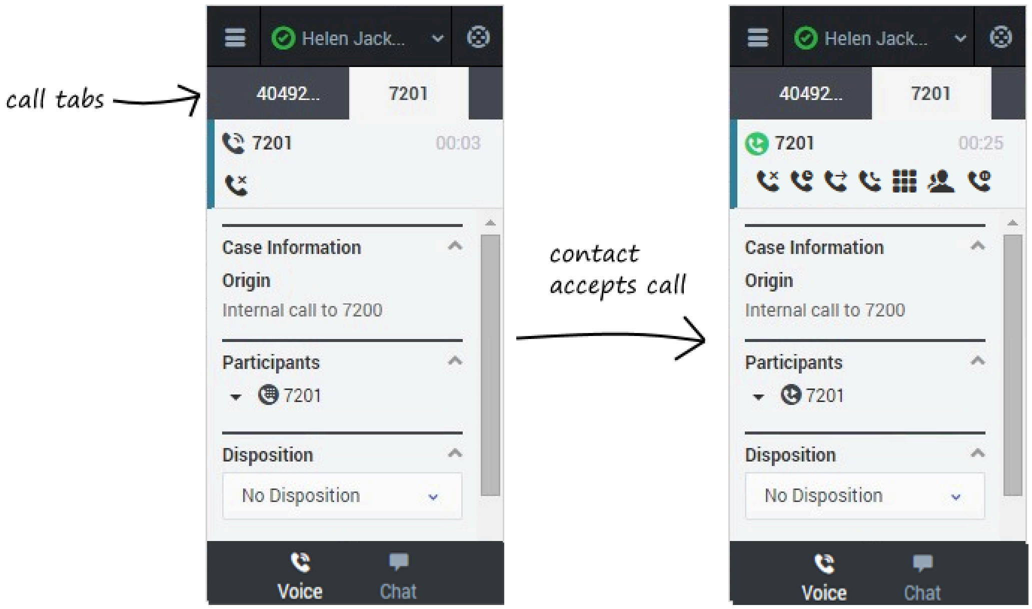
Working with the call



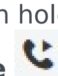
Once you make the call, you'll see two slightly different views as the call transitions from Establishing to Connected. Both views display the call toolbar area and the call details area, which includes sections for Case Information, Participants, Disposition, and Notes.

You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

Dialing another call



If you're already on a call, you can use the adapter to dial a new call.

When you make another call, the adapter automatically puts your first call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  — this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

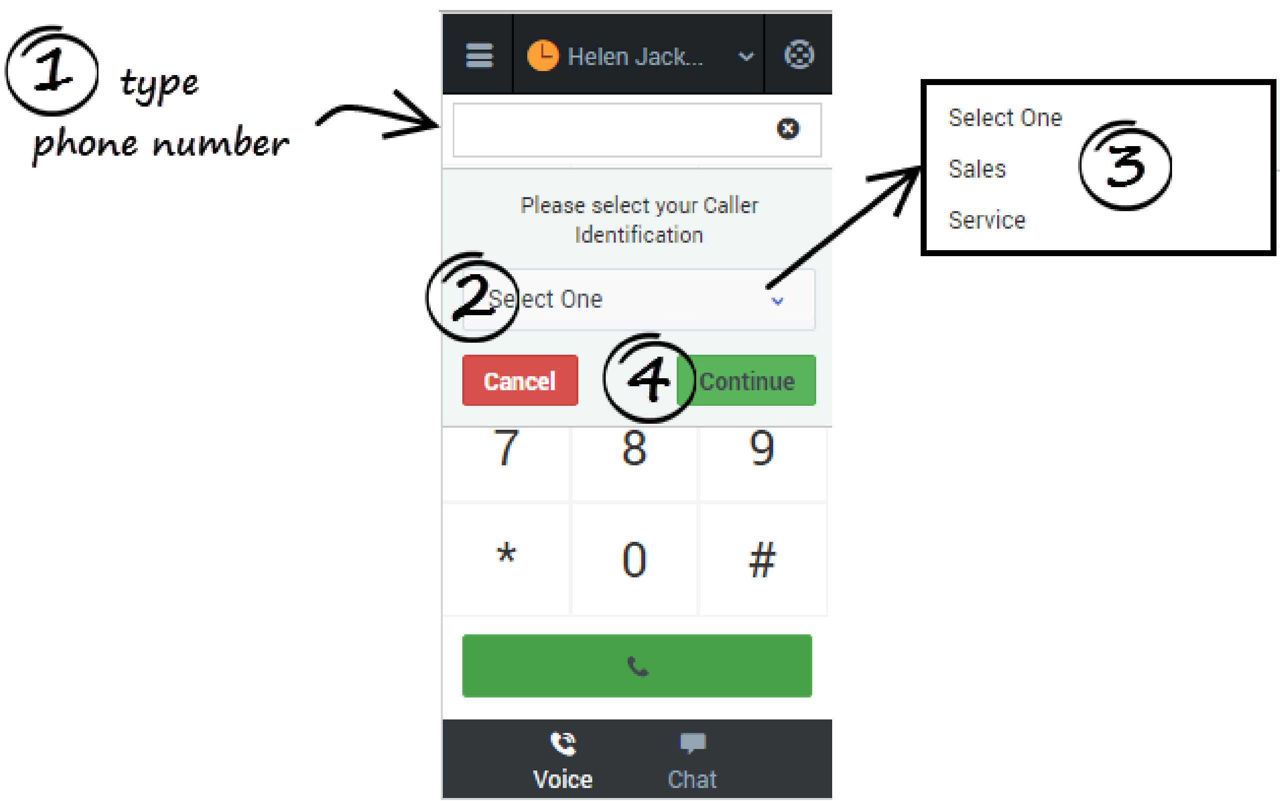
Caller Identification for outbound calls (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

In some contact centers, the agent must choose the caller id that should be used for outbound calls.

If this feature is enabled for your account, when you make an outbound call, the **Please select your Caller Identification** dialog box is displayed. Select the appropriate Caller ID from the predefined list. This number will be displayed to the person receiving your call. The previous Caller ID that you selected is selected by default. Your system might be set up to enable you to hide the caller ID when you make an outbound voice call. If so, the `Anonymous` ID is included in the `Caller Identification` drop-down menu.



Transfer a call (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

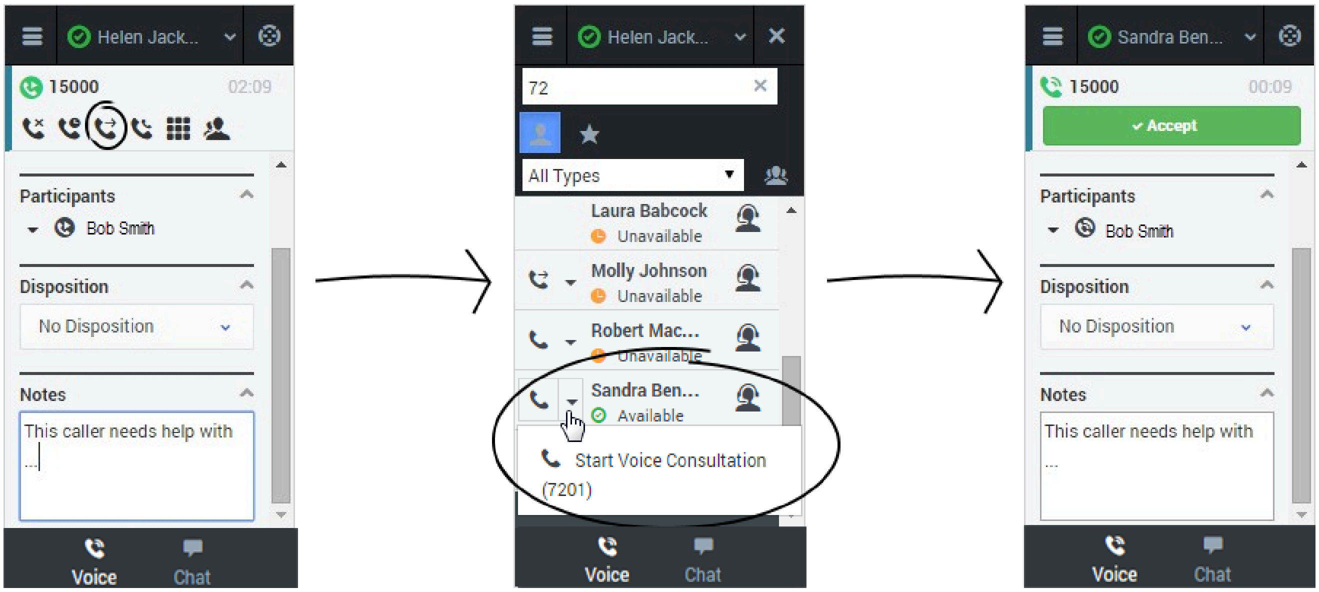
When you're on an active call in Gplus Adapter for Salesforce, you can transfer your current voice call to another party. The other party might be another agent that you find by searching for them by name, or by the name of an agent group, a queue, a skill, or a routing point. Your administrator will give you a list of queues, groups, and skills to which you can transfer calls. Agent groups might include a different language, specific product knowledge, or a higher level of security clearance.

All you have to do is click **Instant Transfer**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and your customer will not have to wait long for the transfer to go through.

If you like, you can provide some details about the call in the **Notes** field before you click **Instant Transfer** . When the contact sees the incoming call, he or she will also see your notes in the call details area.

Important

If your administrator has configured it, the transfer target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.



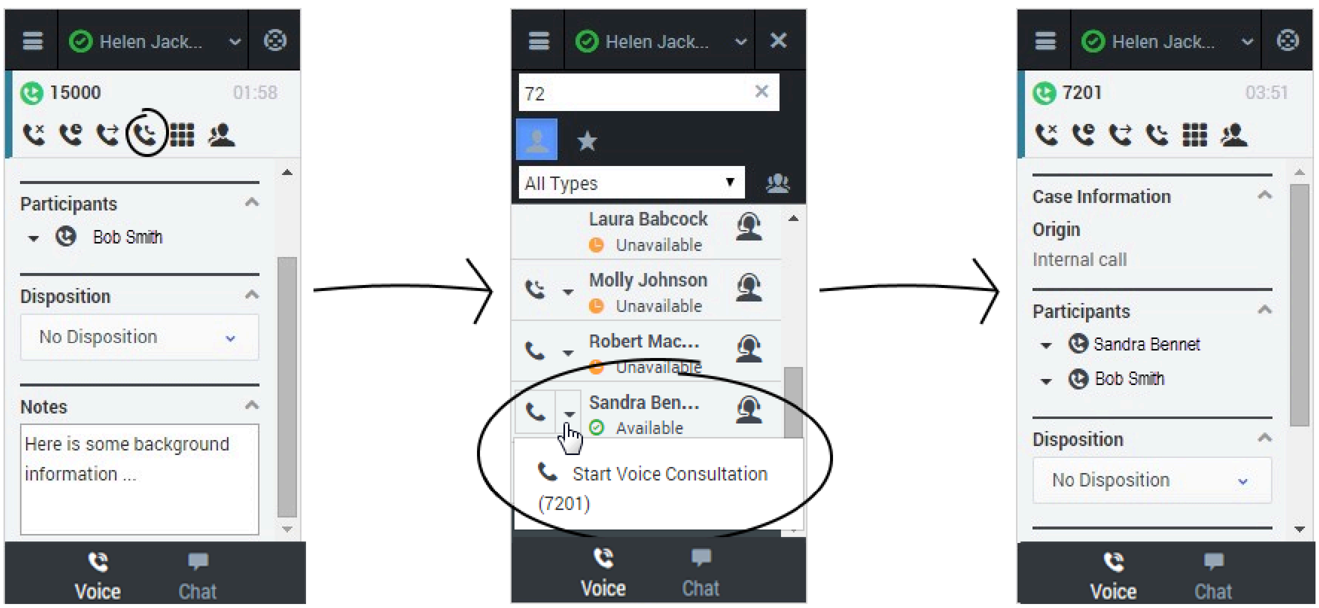
You can also perform consultations where you talk to the transfer target before you transfer the call. See Initiating a Consultation for details.

Conference calls (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you're on an active call in Gplus Adapter for Salesforce, you can perform an instant conference call with another contact.

How do I start a conference call?

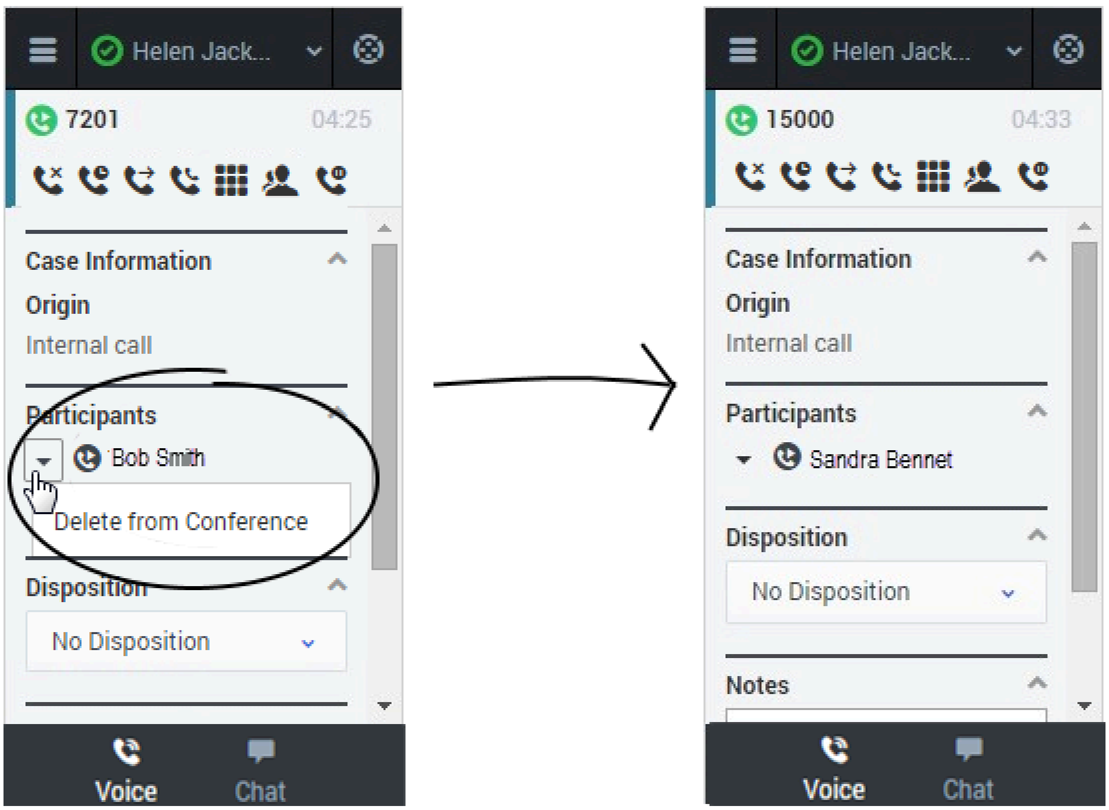


To start an instant conference, just click **Instant Conference**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you and the customer will not have to wait long for the conference to go through. If you like, you can provide some details about the call in the **Notes** field before you click **Instant Conference**. When the contact sees the incoming call, he or she will also see your notes in the call details area.

Important

If your administrator has configured it, the conference target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.

Once the conference is established, you can see the other parties listed in the Participants section. You can remove a participant by clicking the arrow next to the party you want to remove and selecting **Delete from Conference**.



You can also start a consultation and talk with the conference target before performing an instant conference. See Initiating a Consultation for details.

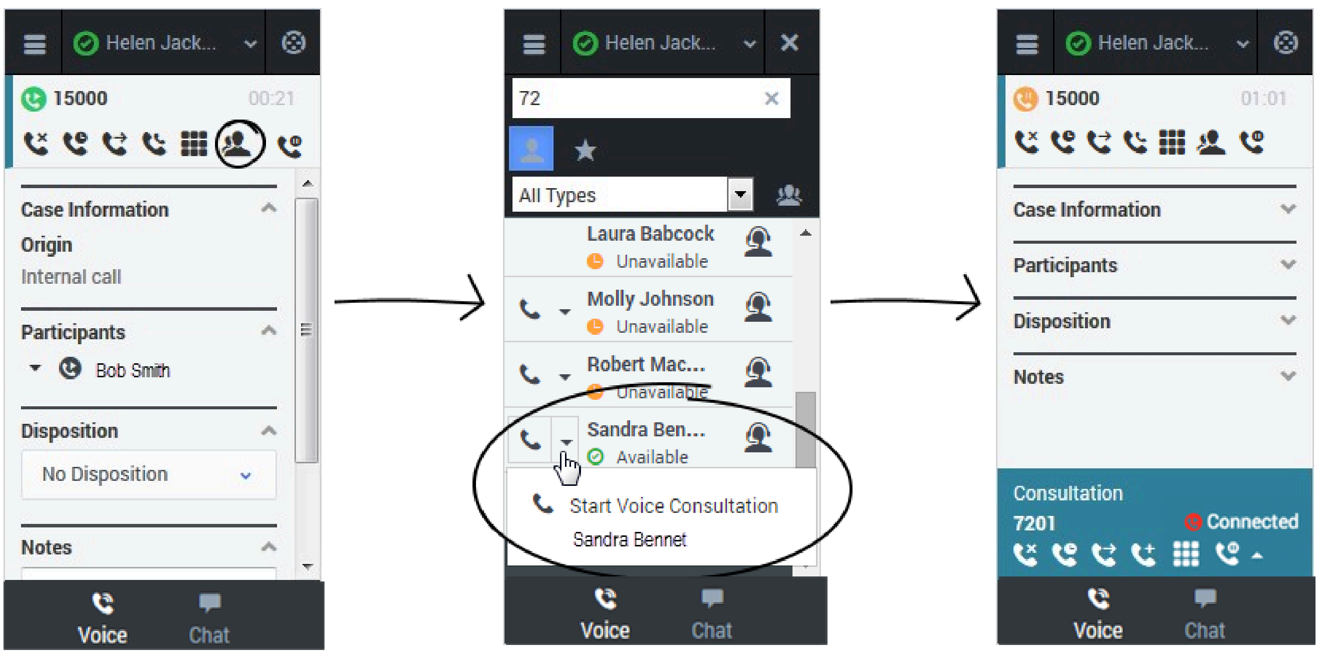
Consultations (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you're on an active call in Gplus Adapter for Salesforce, you can initiate a consultation with another agent at any time.

How do I start a consultation?



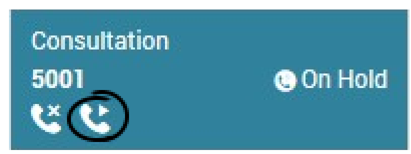
To start a consultation, click **Consult**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you will not have to wait long to start the consultation. The adapter places your original call on hold and adds a consultation area that includes the consultation call state and a list of consultation call actions.

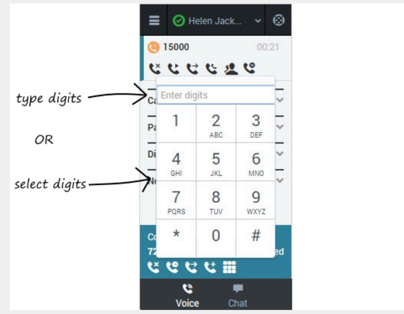
> **Tip**
> You can easily switch back and forth between your original call and your consultation by clicking **Retrieve** or **Retrieve Consultation** .

If you like, you can also provide some details about the call in the notes field. This can be helpful if you consult before transferring or starting a conference call. When the target agent sees the transfer or conference request, he or she also sees your notes in the call details area.

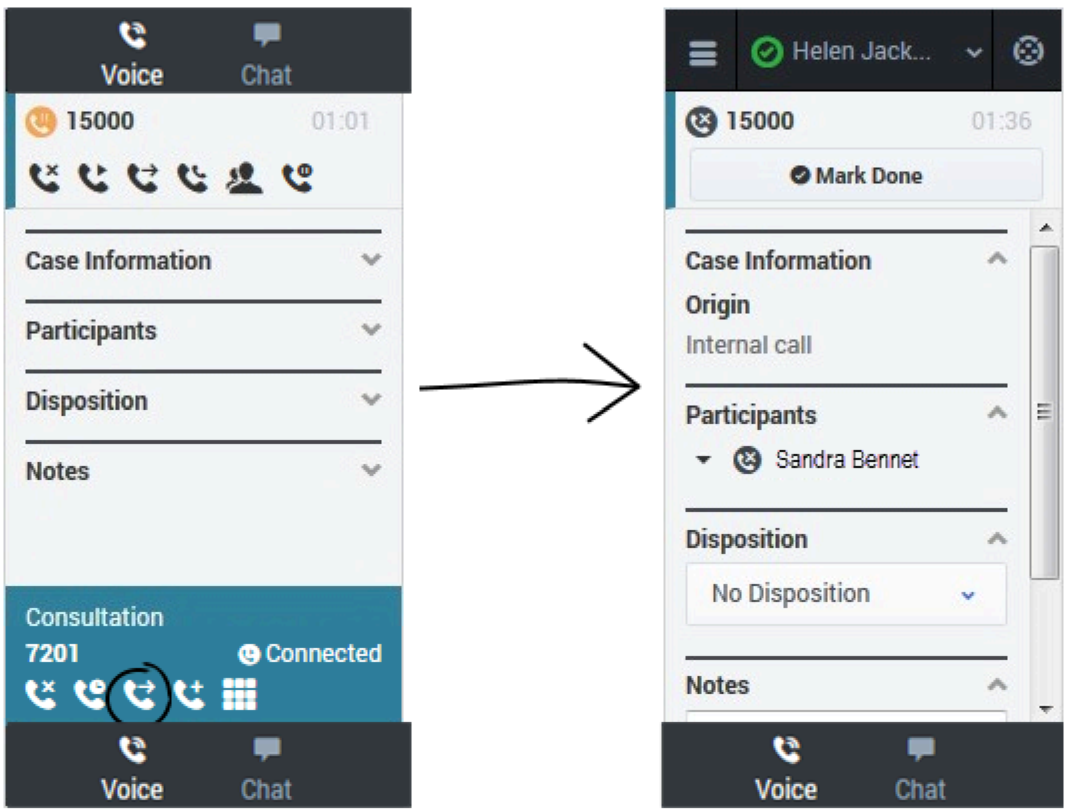
When you have an active consultation call, you should see a consultation area with a list of actions you can perform. **Note:** You might not see all of these buttons, depending on how your environment is configured. The following table describes the common buttons you might see in the list:

[+] Show table

Action	Button	Description
Hang up consultation		Ends the consultation call.
Hold consultation		Places the consultation on hold. If you do this, you'll see a slightly different list of actions with a **Retrieve Consultation** button : 
Complete as transfer		Redirects the call to the consulting agent. See Consult before Transfer for details.
Complete as conference		Starts a voice conference with the current call and the consulting agent. See Consult before Conference for details.
Keypad		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.

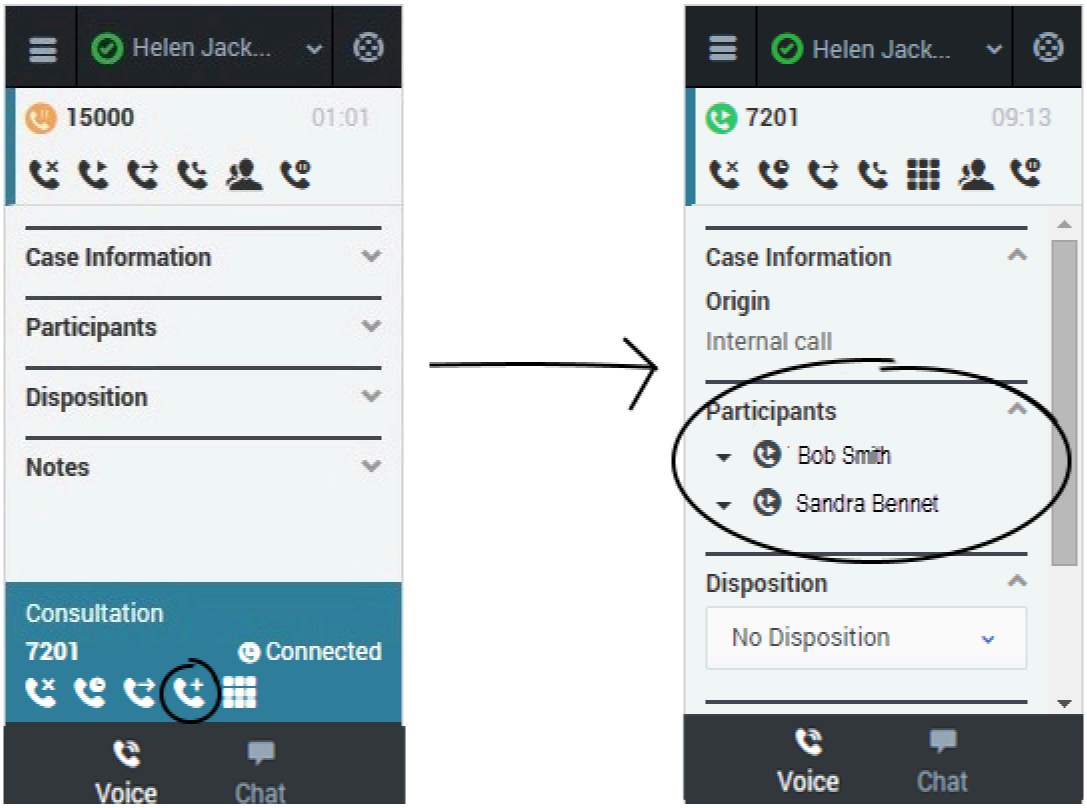
Action	Button	Description
		

How do I transfer the caller to the consulting agent?



You can transfer your original call to the agent you're consulting with by clicking **Complete as Transfer** . This immediately transfers the call to the consulting agent and ends it for you. As usual, you can add call information and click **Mark Done** to finish.

How do I turn my consultation in a conference call?



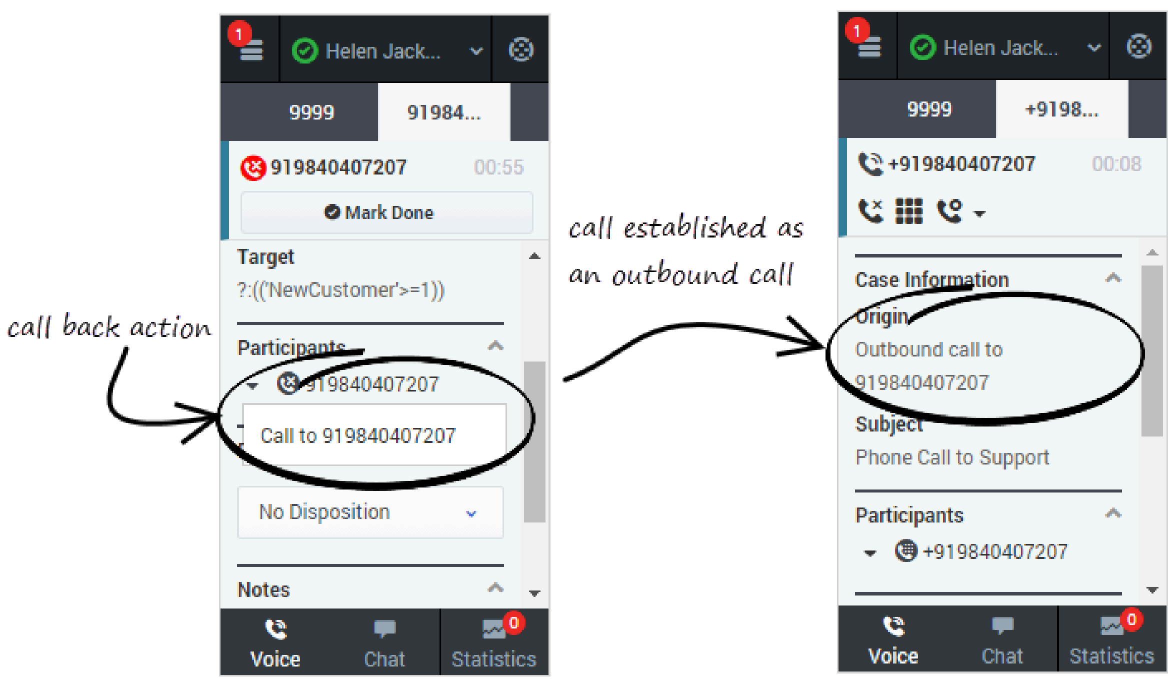
You can initiate a conference call between you, the customer, and the agent you're consulting with by clicking **Complete as Conference** . This immediately retrieves your original call from hold and adds the agent. As with regular conferences, you can remove participants and add call information like disposition and notes.

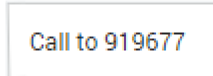
Call back a disconnected participant (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you're on an active call in Gplus Adapter for Salesforce, you can call back a participant that is disconnected from the current call.

How do I call back a participant?



To call back a participant, expand the **Participants** drop down list, hover over the disconnected participant contact number, and just click the **Call to** 

action. You can see the call being established as an outbound call in the **Case Information** section.

Once the call is established, you can see the dialed party once again listed in the **Participants** section. For the called back participant, you can perform general call actions such as conference and consultation.

Important

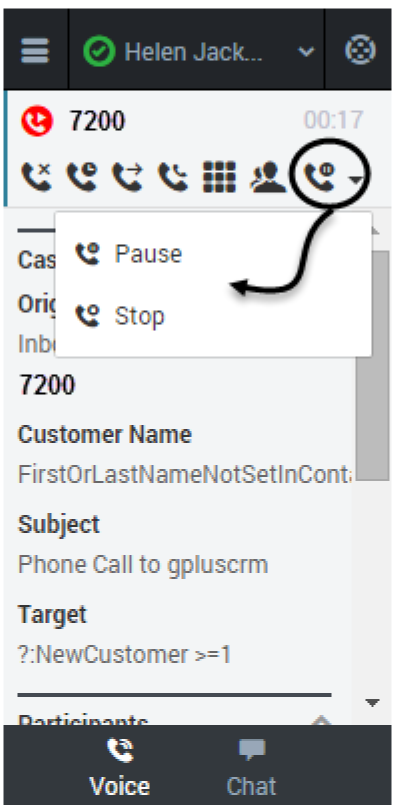
You cannot place a call back for internal calls.

Recording a Call (v8)

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Call Recording functionality enables you to record the current conversation or consultation call with a customer or an internal caller.

How do I record a call?

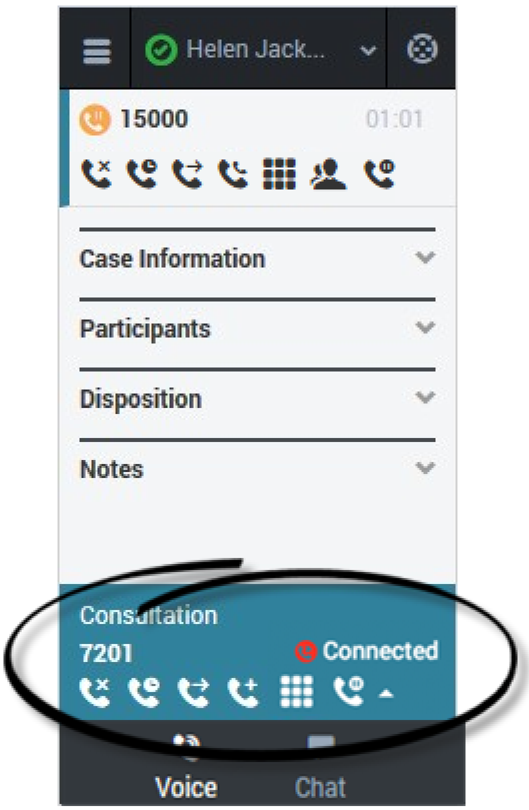


To record a call, you click the **Record** button or choose an action from the drop-down list box. Your call center might be configured to record all calls by default. In this case, you can pause, stop, or restart a recording using the Record options. The following table describes the actions that you can perform:

records the call.After you click the **Record** button, the call status indicator is red . The recording continues until you pause or stop the recording.

stops the recording. After you stop the recording, the call status indicator is green and the **Pause** button returns to be the **Record** button. pauses the recording. When you pause the recording, the **Pause** button becomes the **Resume** button.

How do I record a consultation?



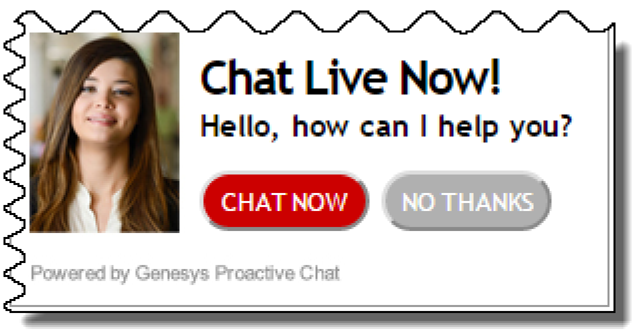
You can also record a consultation. During a voice consultation, look for the controls at the bottom of the adapter.

Working with the Chat channel (v8)

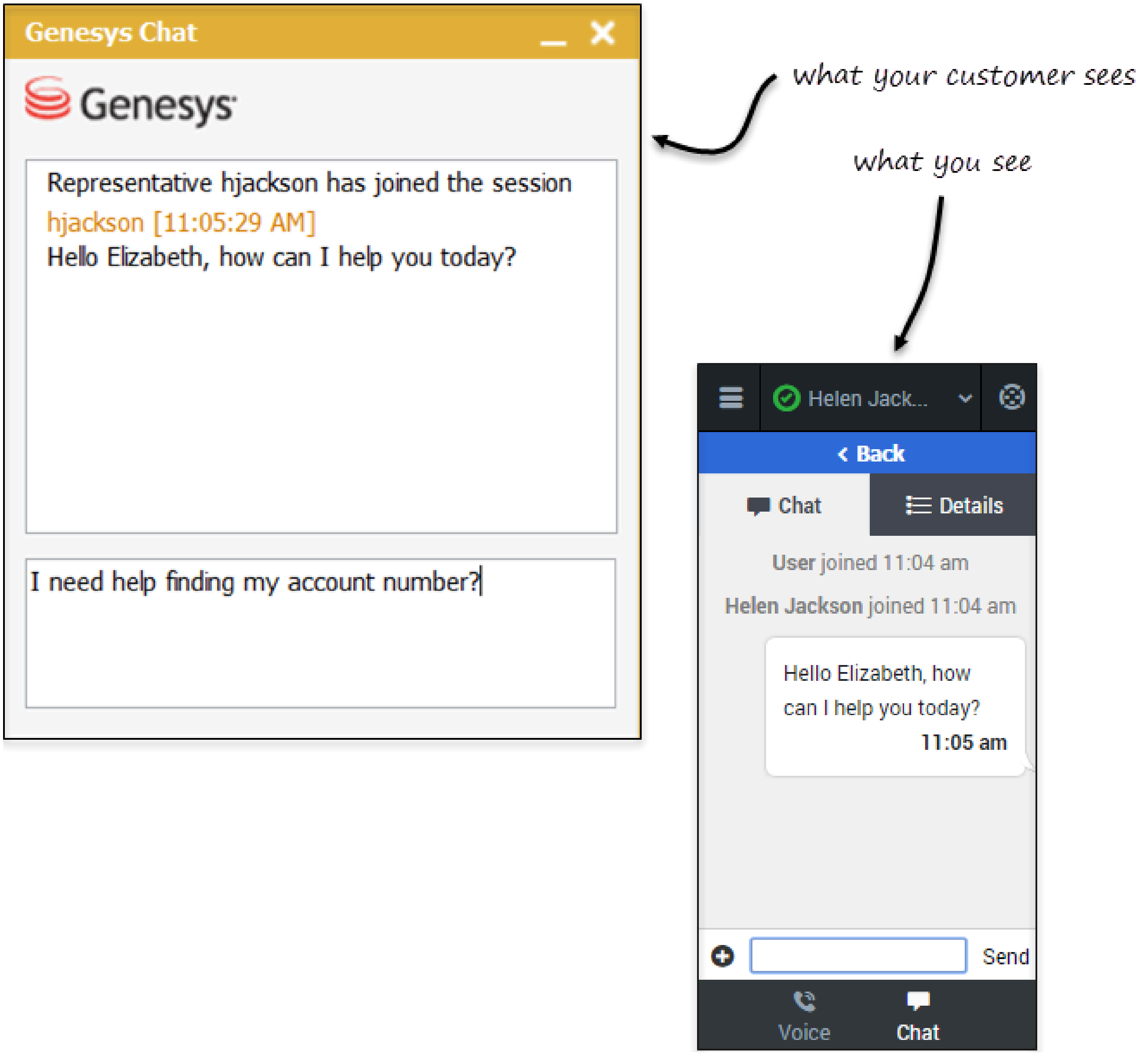
Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

As part of the omnichannel customer experience, customers have the opportunity to chat with a live agent while browsing on your website. This proactive touchpoint with the customer enables him or her to reach out to you for assistance, if needed. The invitation that the customer sees might resemble the following pop-up window:



Chat channel overview

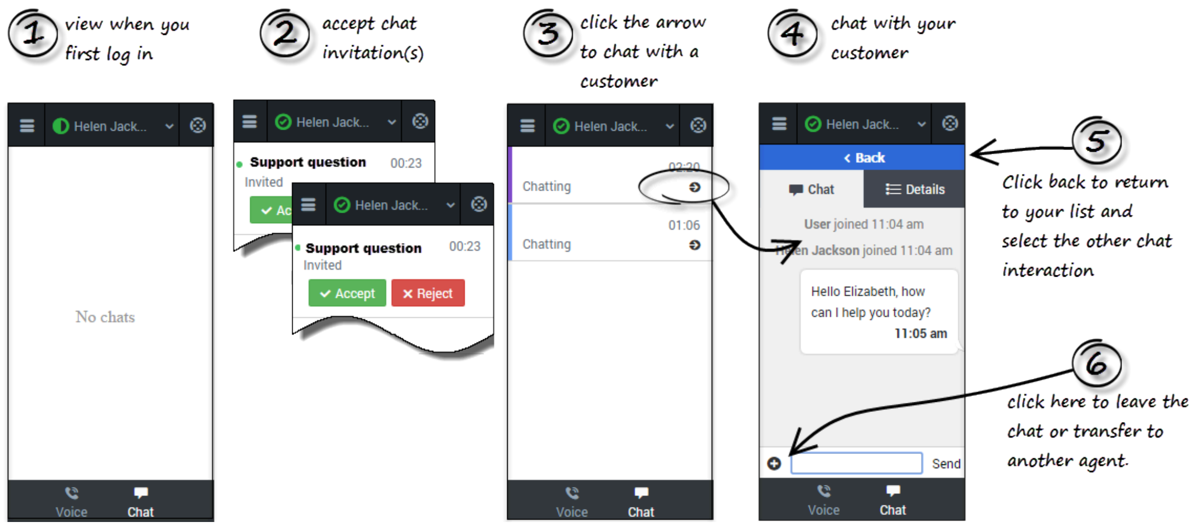


After you log into the adapter and navigate to the chat channel, you'll see the default view where you can accept or reject a chat.

Using the chat channel, you can:

- Chat with a customer
- Manage multiple chat conversations
- Transfer a chat

When you log into the adapter and navigate to the chat channel, you'll see the default view where you can accept chat invitations. At first, your chat list will be empty. After you start accepting invitations, your chat list will include all active chats. To access the chat view for an interaction, select the arrow beside the chat list entry. This displays the chat view in which you can send and receive messages. This view has two main areas: chat transcript and chat details. To access other chat interaction son the list, select the **Back** button to return to the list and select another chat.



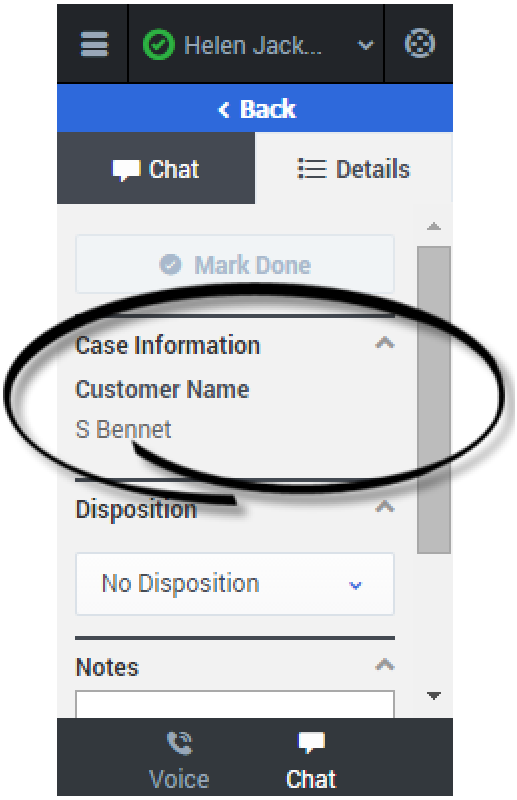
Important

Regardless of what page you are on in the Chat channel, the **Back** button will always take you back to your list of interactions.

Chat details

The Chat details view shows you all the data the adapter has about the chat, and it provides fields that you can edit to add more information. After you view the details, you can click the **Chat** tab to return to your conversation or click **Back** to return to the main list of chats.

Case Information



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

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

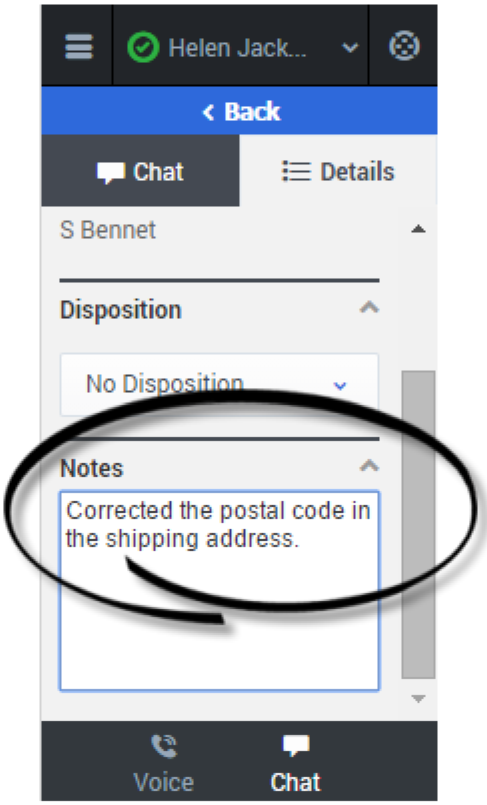
- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

> **Tip**
> For chat interactions, the **Call Type** field shows all chats as Inbound.

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?

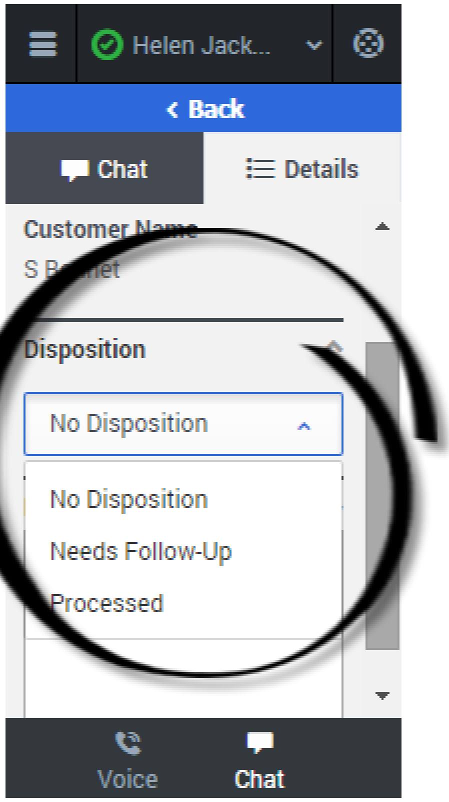
Case information fields might contain a URL that you can click to access more information.

Notes



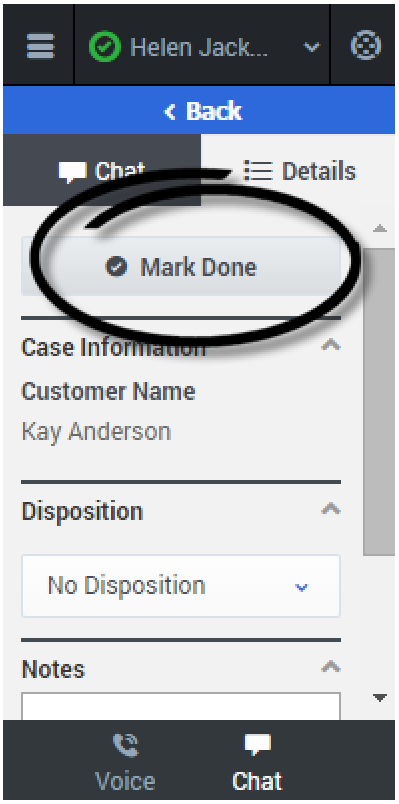
If configured by your administrator, you can add notes either during the chat or as part of your after-call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Disposition



If configured by your administrator, you can change the disposition for a call either during the chat or as part of your after-call work. You can use this field to record the business outcome of the chat. To update, just click the dropdown list and 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**.

Finishing a chat



When your chat is over, either because the other party left the chat or you clicked **Leave Chat** , you might need to update some information in the details area (such as Disposition or Notes).

After finishing your after-chat work, you can click **Mark Done**, which completes the chat and sends you back to the main chat channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or another status, if configured by your administrator; otherwise, you have to change it yourself.

After you mark a chat as done, the chat list is displayed where you can choose another chat to work with.

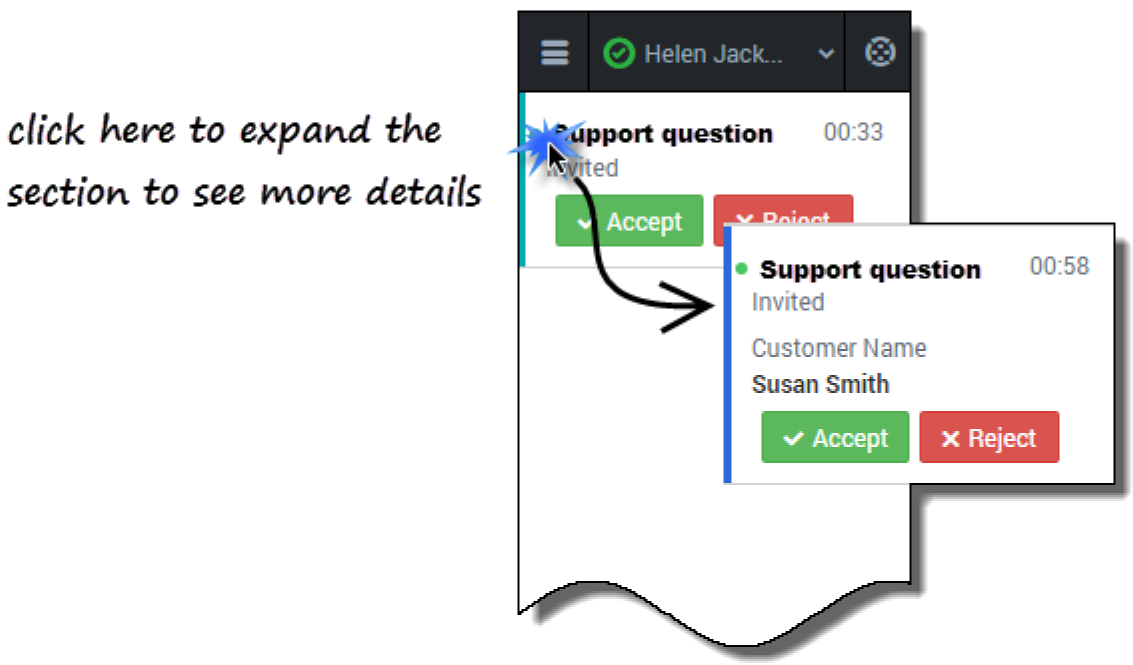
Chatting with a customer (v8)

Important

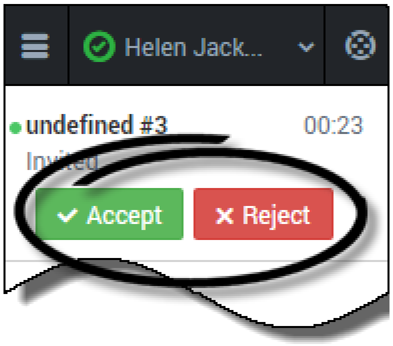
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you open your chat channel, the main chat view is displayed. Initially, there are no chat invitations displayed. When a new chat interaction arrives, it is displayed in your list. A green symbol is displayed beside each unanswered chat invitation. The symbol goes away after you accept the chat and the status changes to show that your chat is in progress. This view is useful for when you are managing multiple chats.

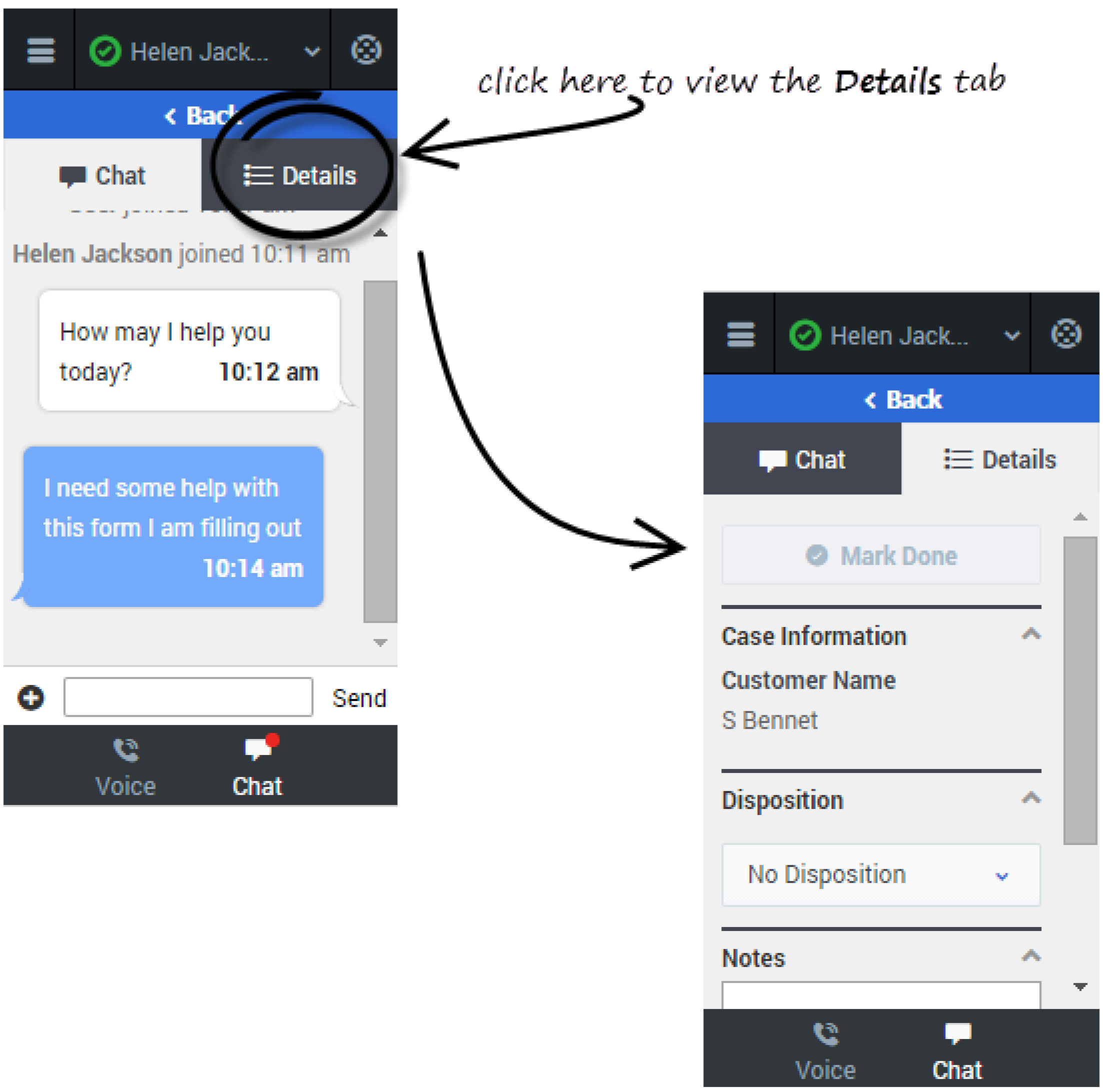
You can click any white space on the invitation to view more details about the chat before you accept or reject it.



You can choose to **Accept** or **Reject** the chat invitation.



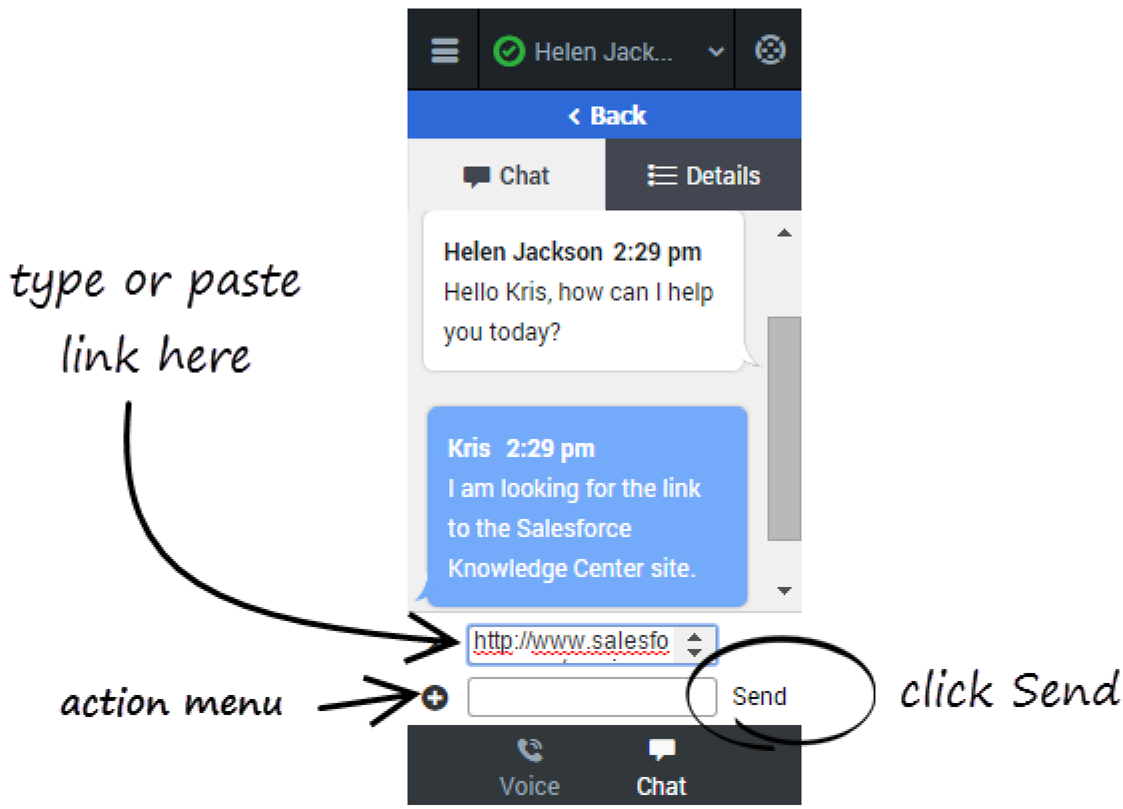
How to conduct a chat



When you accept a chat invitation, the Details view for the chat is opened, you can click the Chat view to chat with your customer. This is where you actively chat with your customer. Chatting is very simple. You just read the messages, and respond by typing text in the text field and then clicking **Send**. You can also click the **Details** tab to view call details.

To conduct a chat, click **Accept** when a new chat invitation arrives. If required, click the **Details** tab to view the call details. Conduct your chat conversation with your customer. When the conversation is complete, click the ⊕ symbol at the bottom of the adapter, and then select **Leave Chat**. On the **Detail** tab, enter your notes, select a disposition, and click **Mark Done**.

How to send a link



While chatting with a customer, you might want to send a link to a website. For example, you can send a link to an application form for a client card or a knowledge center on your support site.

To send a link, click **Send Link** in the Actions menu. Copy and paste (or type) the Universal Resource Locator (URL) in the URL field above the entry field that pops up. You can also type a message to accompany the link in the text entry field. Then you click **Send**. The Adapter validates the URL and sends the link to your client.

After you send a URL to a customer, the link stays active in the transcript so that the customer can access the link after the call is complete.

Warning

If your browser is refreshed or closed while you are in the middle of a chat session, the chat session will resume after you log back into the adapter. However, if you are typing a message at the time the browser closes or refreshes, your message will be lost. When you close your browser window, you are automatically logged out the Adapter. All interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

Important

If you reject the chat, the chat invitation is no longer displayed on the list and the customer is routed to another agent.

Troubleshooting tip

If the customer leaves the chat before you accept the invitation, a message is displayed in the chat transcript. This message lets you know that the chat is now offline. The only action that you can perform in an offline chat is mark the chat as done.

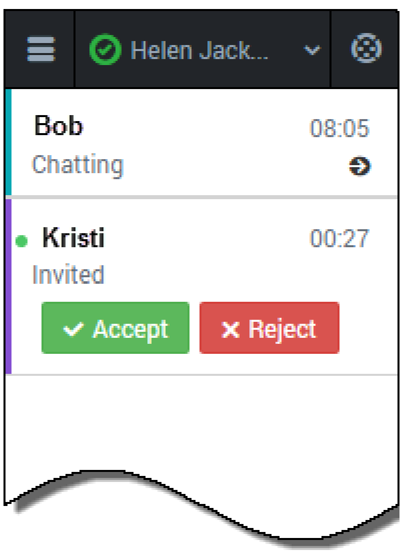
Managing multiple chat interactions (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Chat channel features make it easy for you to manage multiple chat interactions. If you have two or more active chat interactions on the go, you can see when you have incoming messages from your other parties and navigate among the chat interactions.

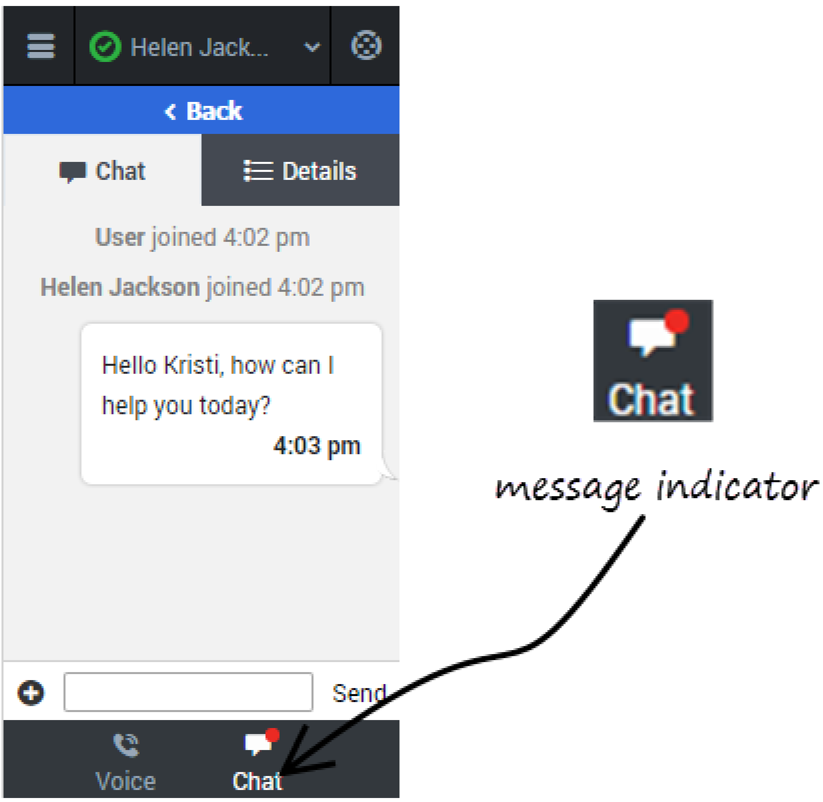
How do I handle two chats at the same time?



Consider this scenario. You are chatting with Bob, a customer who needs your help to complete an online form, when you see a notification on your chat channel icon at the bottom of the adapter. This notification means that you have a message from another in-progress chat or a pending invitation.

Navigate to the main chat list. Notice that you now have two entries on the list:

- Your chat that already is in progress
- A pending chat invitation from another customer



You can accept the invitation and start the interaction with Kristi. Conversely, if you need to focus on your in-progress chat with Bob, you can click **Reject**. The second chat invitation is routed to the next available agent and the entry is removed from your list.

In this scenario, though, let's accept the chat invitation.

After you greet Kristi and start chatting with her, a new message indicator is displayed on the tab header and a red circle is displayed next to Bob's entry on the chat list. Bob responded to your last message.

You can click **Back** to return to your chat list, select the arrow next to Bob's chat interaction, and continue chatting with Bob.

In this manner, you can manage several conversations at one time. Remember after each chat is concluded, you must complete the finishing tasks on the **Details** tab and mark the chat as **Done**.

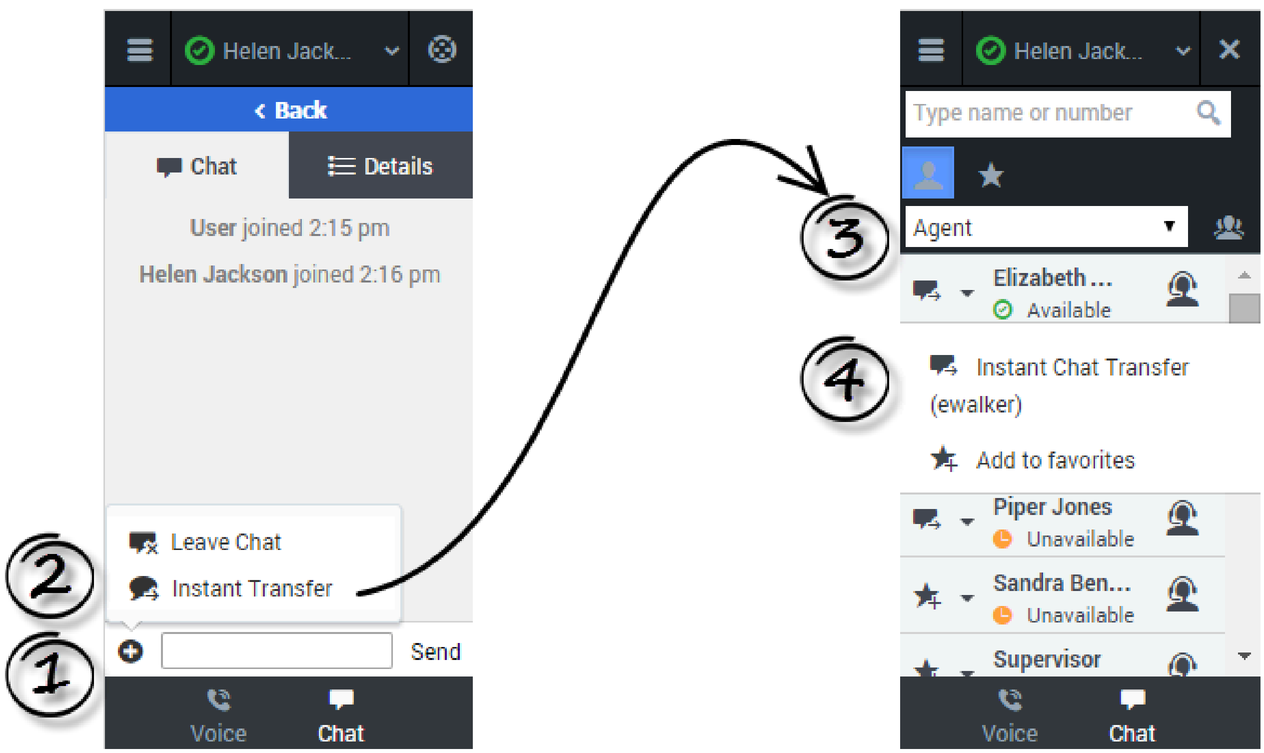
Transferring a Chat (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you're on an active chat in Gplus Adapter for Salesforce, you can transfer a chat to another agent. Let's say, for example, that your customer has asked you a question on a topic that you are not trained in.

How do I transfer a chat to another agent?



To transfer a chat, click the plus symbol at the bottom of the **Chat** tab. Click **Instant Transfer**. Choose an agent in the Team Communicator. Click the list box and select **Instant Transfer**.

Information transfer

Link to video

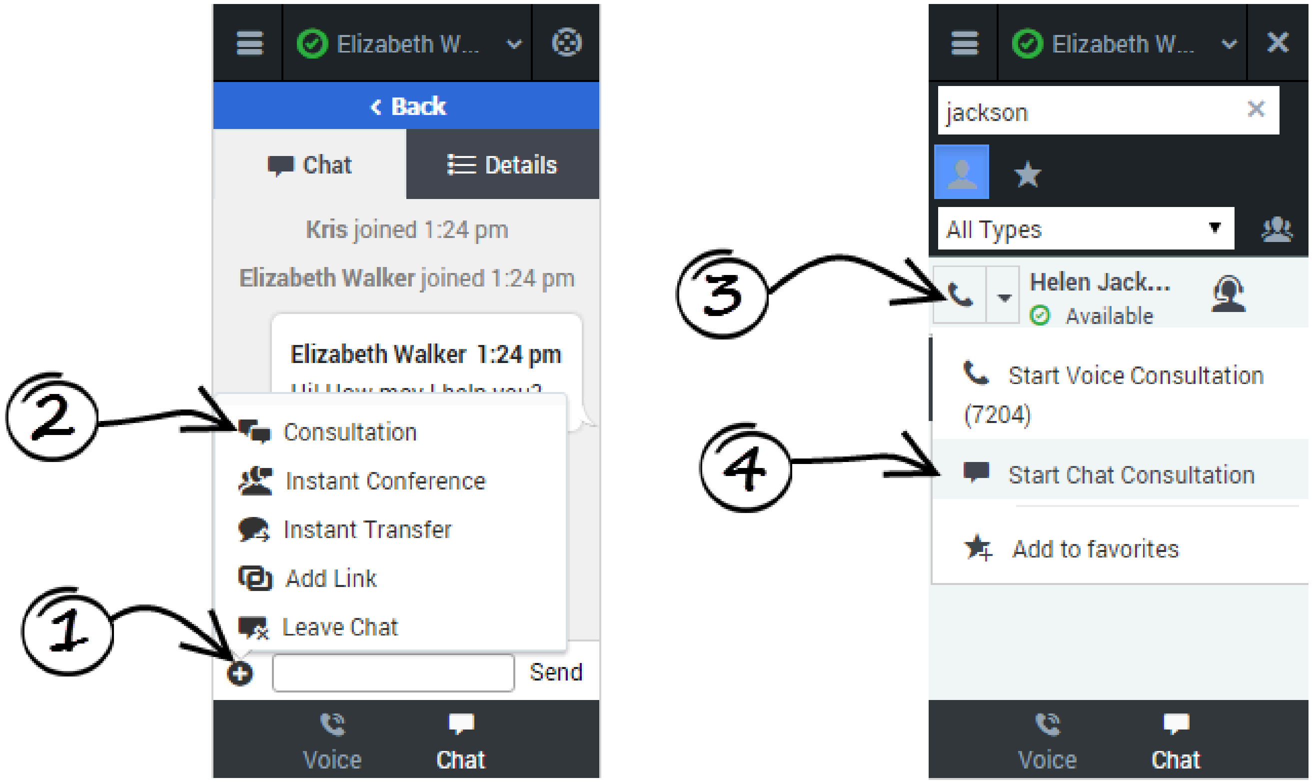
If your administrator has configured it, the agent to whom you are transferring the chat might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the **Edit Contact** screen.

Chat consultations (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you need support while chatting with a customer, you can use the Gplus Adapter for Salesforce to consult with another agent or supervisor. For example, if a customer asks you a question that you don't know or can't find the answer to, you can open a chat consultation with an agent or supervisor that has the knowledge or skill that you need to complete your chat interaction successfully. If necessary, you can easily start a conference chat with you, the customer, and the other agent, or you can transfer the customer directly to the other agent.

Start a consultation

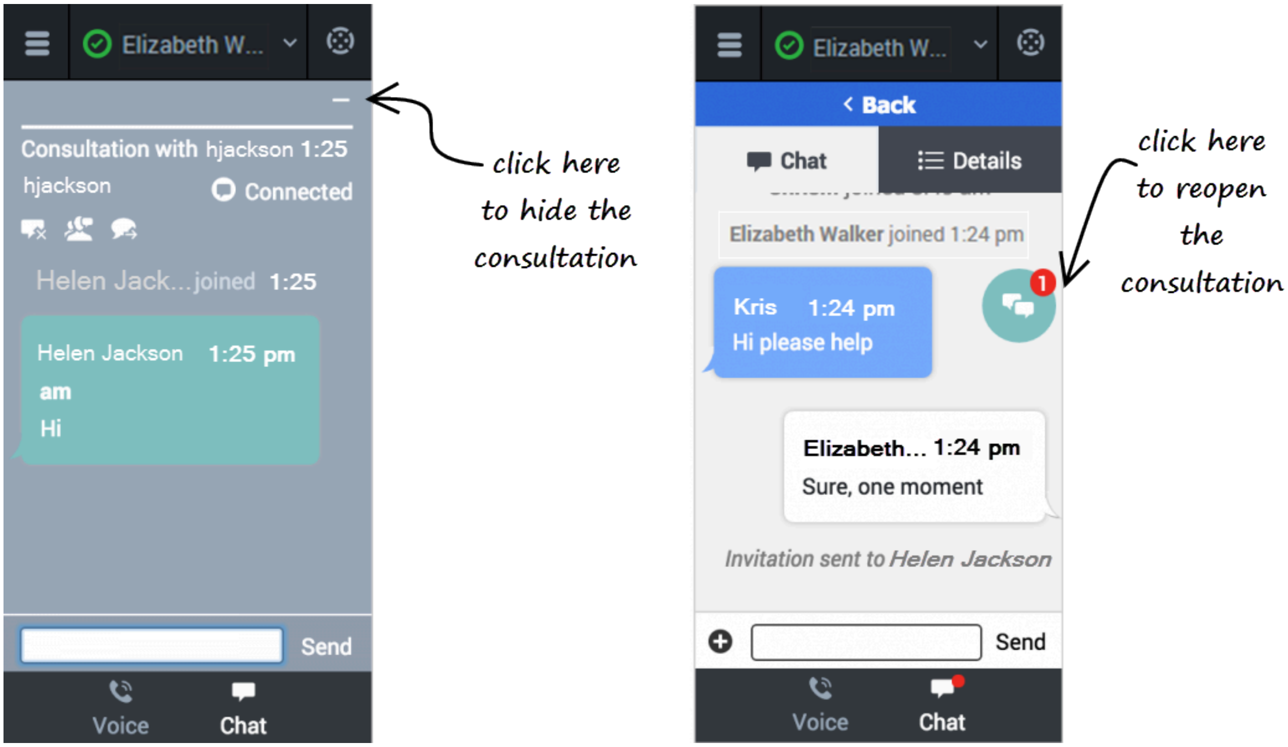


To start a consultation, click **Consultation** on the action menu. After you choose an agent from the Team Communicator and click **Start Chat Consultation**, and the other agent accepts, a collapsible view is displayed over top the current chat view. In this consultation view, you can chat with the other agent. Any text that you type in the consultation view is not visible to your customer.

Let's take a look at the actions that you can take to conclude the chat. You can:

- —End the consultation, and return to the customer chat.
- —Complete the chat as a three-way conference. This brings the customer and the agent into the same chat window, allowing for a three-way conversation.
- —Transfer the chat to the other agent. This concludes your chat with the customer, and the other agent continues.

Managing consultations



You will have chat interactions where you might have several chat views on the go at once. Even in a normal one customer and one agent consultation, you need to manage these multiple screens.

During a consultation, When you need to go back to the customer, click the dash symbol at the top of the view. This collapses the consultation view to a colored bubble. You can place this bubble anywhere on your Adapter by clicking and dragging the bubble. When the consulting agent types a message to you, a notification is displayed on the bubble. For example, if the agent send two messages to you, the number 2 is displayed on the bubble. To return to a consultation, click the chat bubble and the collapsible view is displayed again.

When you have multiple active consultations, each bubble is a different color.

Case Information management (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

In the Gplus Adapter, case information can be modified for voice calls and chat iterations. If you see the pencil icon beside a field or the plus symbol at the top of the **Case Information** section, you have the correct access permissions to update case information. Otherwise, contact your administrator or follow your contact center procedures for updating case information. |}

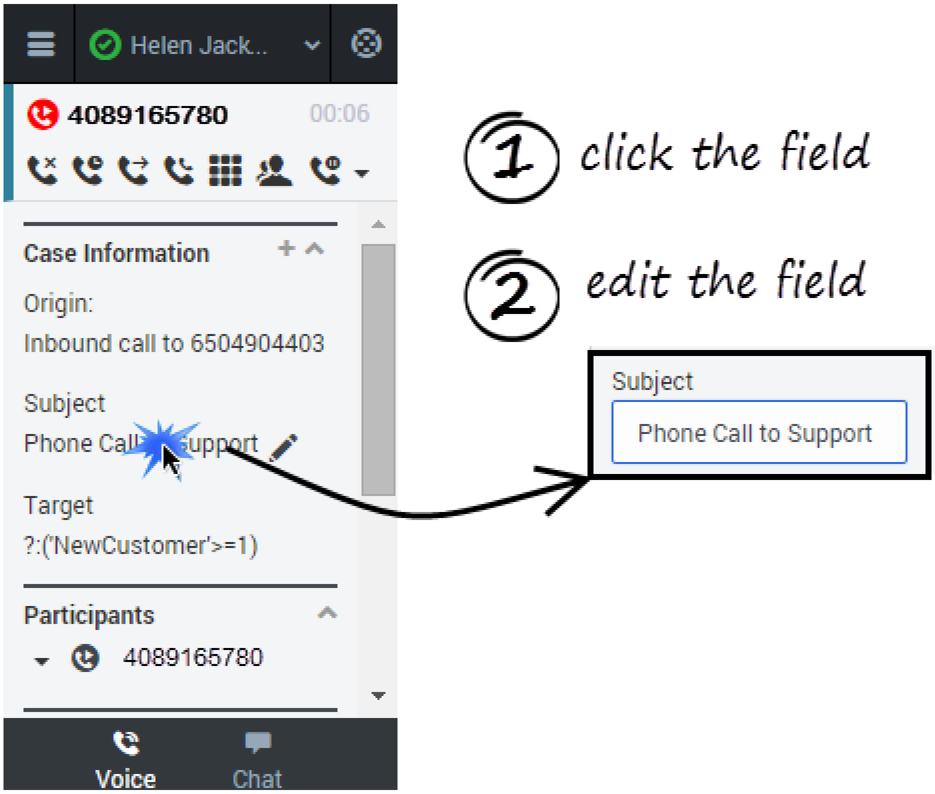
Link to video

Consider this scenario to understand why you would update case information. A customer calls your call center to update details on their account. While talking with your customer you realize that his last name is spelled incorrectly in the contact name field. You can easily correct the spelling error. Many other scenarios could happen such as a complete name change, an update to the reason for calling, or a change in account number.

If you have permission, you can manage the case information in the following ways:

- Edit fields to update the contents of the field.
- Add additional fields to the case information.
- Delete unnecessary fields.

How do I update a Case Information field?

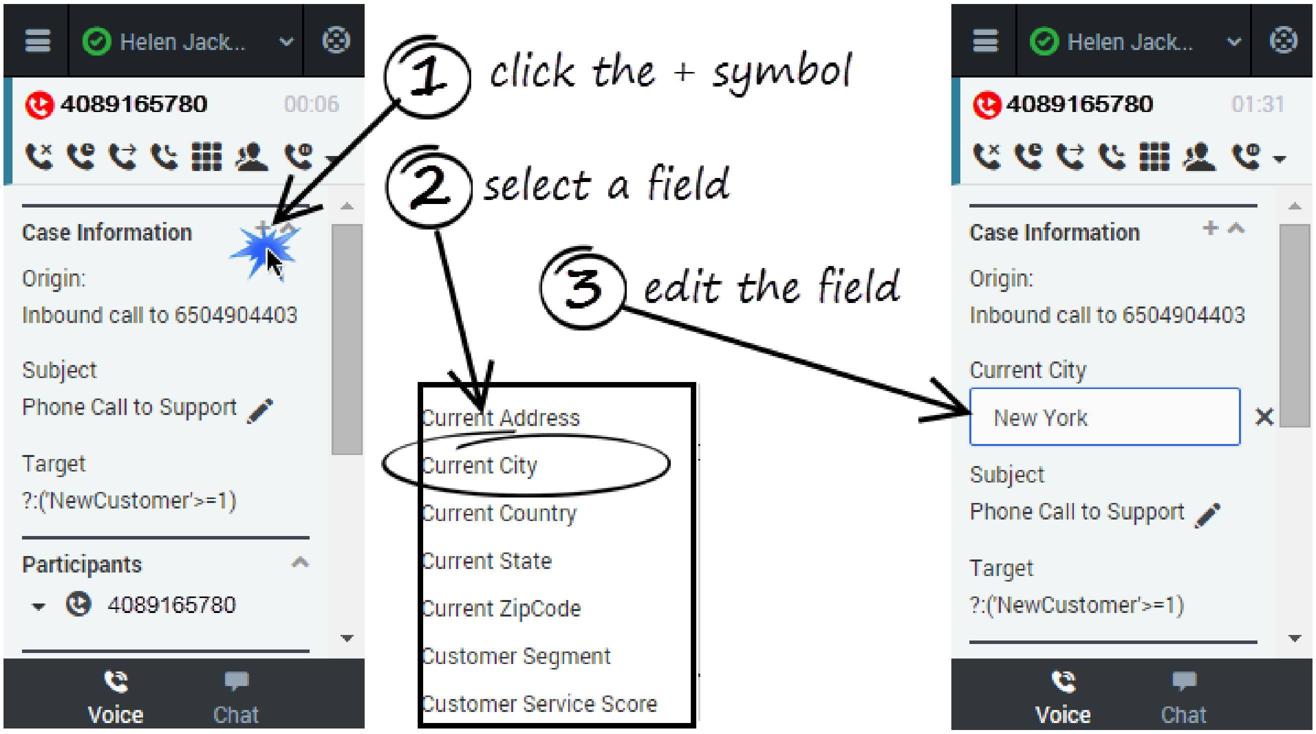


To edit case information, select the field that you want to edit. A text field, a selection drop-down list, or a calendar displays depending on the type of case data.

Each type of field has validation criteria to ensure that you enter the correct information. This prevents you from typing an invalid character or exceeding the maximum number of characters. For example, if you have to enter a credit card number, the field might only allow certain numbers for a particular type of credit card.

If your edit does not match the data validation criteria for the field type, an error icon displays to tell you that you must correct your entry.

How do I add and delete Case Information fields?



To add a field to the case information, click the plus symbol (+) and select an option from the list that displays. After you add the field, you can edit the case information.

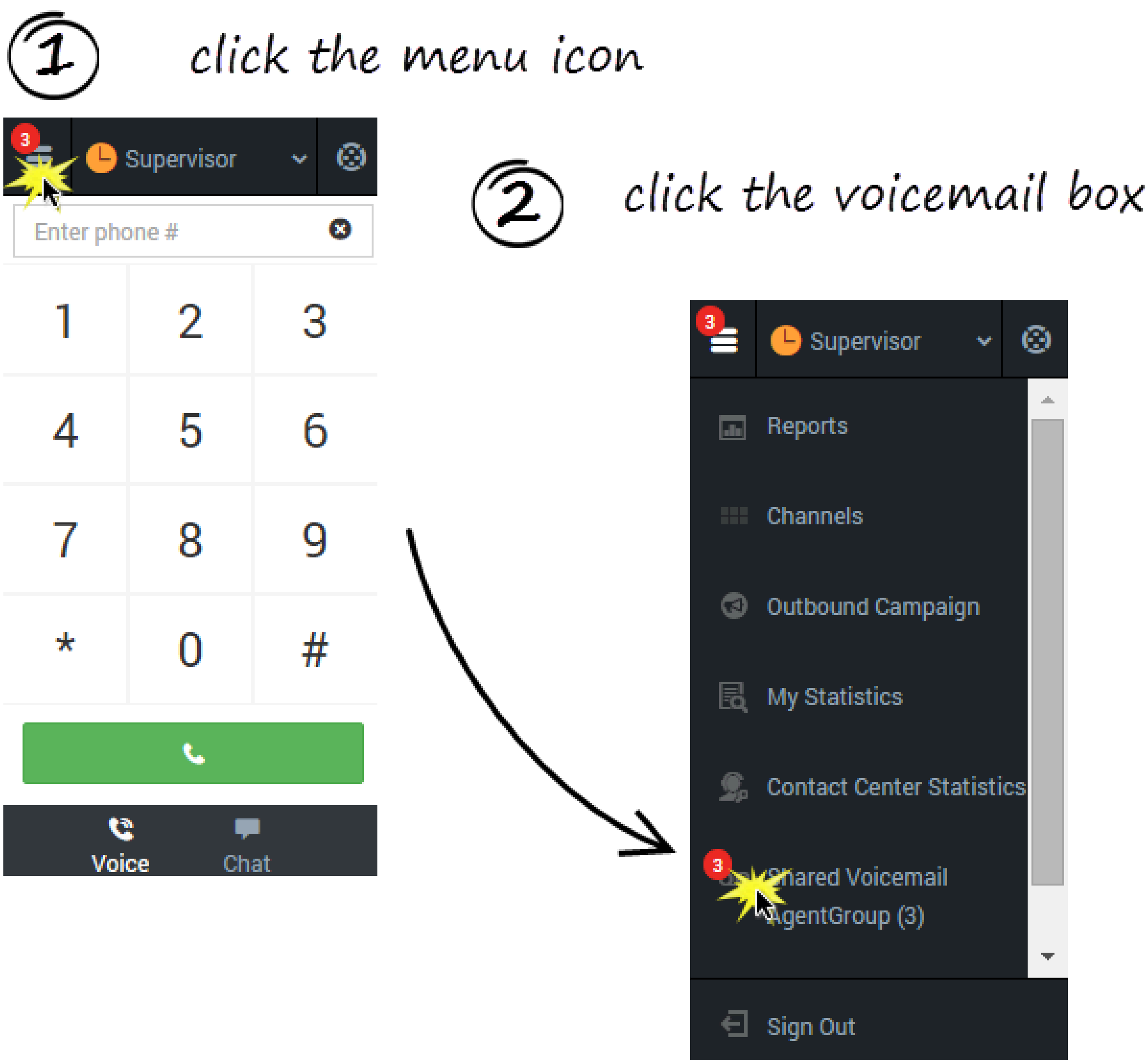
The types of fields you can add depend on what your administrator configured for your contact center. For example, you can an additional field to indicate a preferred language.

To delete a field, click X icon to the right of the field.

Voicemail (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.



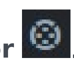
If a red circle with a white number is displayed on the main menu  button, you have voicemail waiting for you. Click the button to view a list of your voicemail boxes.

You have a personal voicemail box and possibly a group voicemail box associated with the agent group you belong to. Your mailboxes are only displayed when you have at least one message in the mailbox. When you do have mail, the number of messages in each of your voicemail boxes is displayed beside the name of the voicemail box. Select the voicemail box to open it and listen to your voicemail.

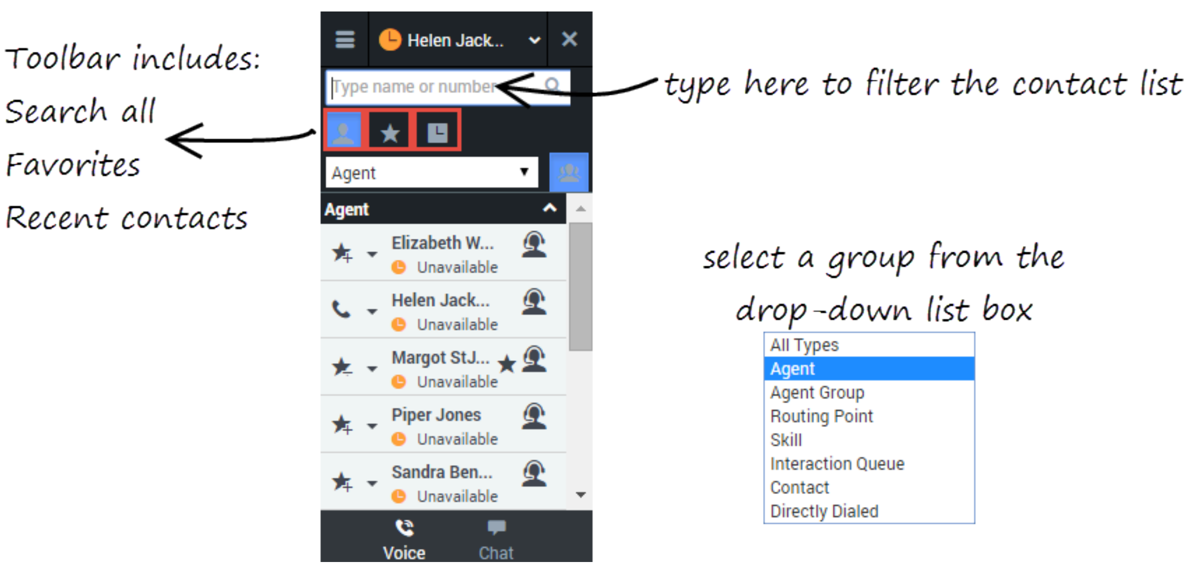
Contact management (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

When you need help to resolve a customer issue or you need to transfer the call, use the Team Communicator to locate the contact you need to reach. You can also use the Team Communicator to initiate a call. The contacts in the Team Communicator are already set up for you to use; however, you can add contacts and mark contacts as favorites. After you learn how to navigate the Team Communicator, you should be able to locate your contacts quickly and reduce the amount of call time you use to search for contact.

To open the Team Communicator, click **Team Communicator** .

Find a contact



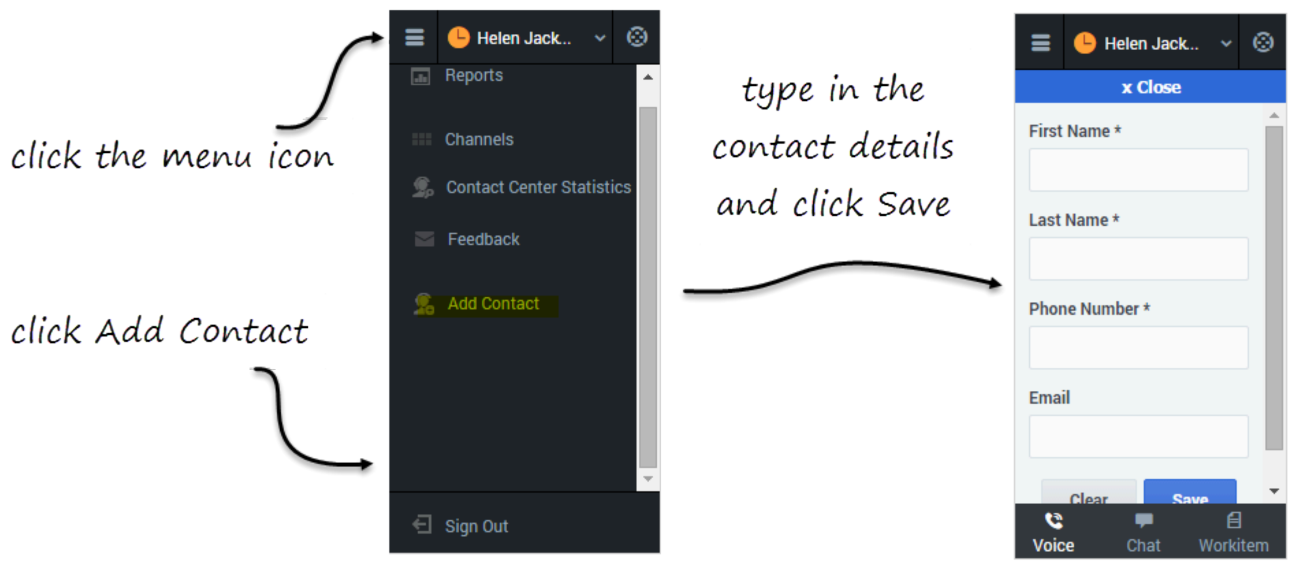
The Team Communicator provides several ways to find a contact.

- Type a name or number in the text field to filter the contact list. The contact list filters the list for you as you type, even if you only type part of a name. For example, if you want to locate the contact for Sandra, you can type San and the list shows all contacts with San in the name.

- The toolbar enables you to:
  - —List all contact types
  - —List your personal and corporate favorite
  - —List recent contacts
- The drop-down list box enables you to display categories of contacts, such as agent groups, routing points, skills, and other such groupings.

Favorite contacts have a star  next to the contact name. Corporate favorites are contacts that marked as favorite by an administrator for use with all agents in your agent group or contact center.

Adding a new contact



Sometimes, you might need to add contacts to your contact list. For example, you can add an external contact.

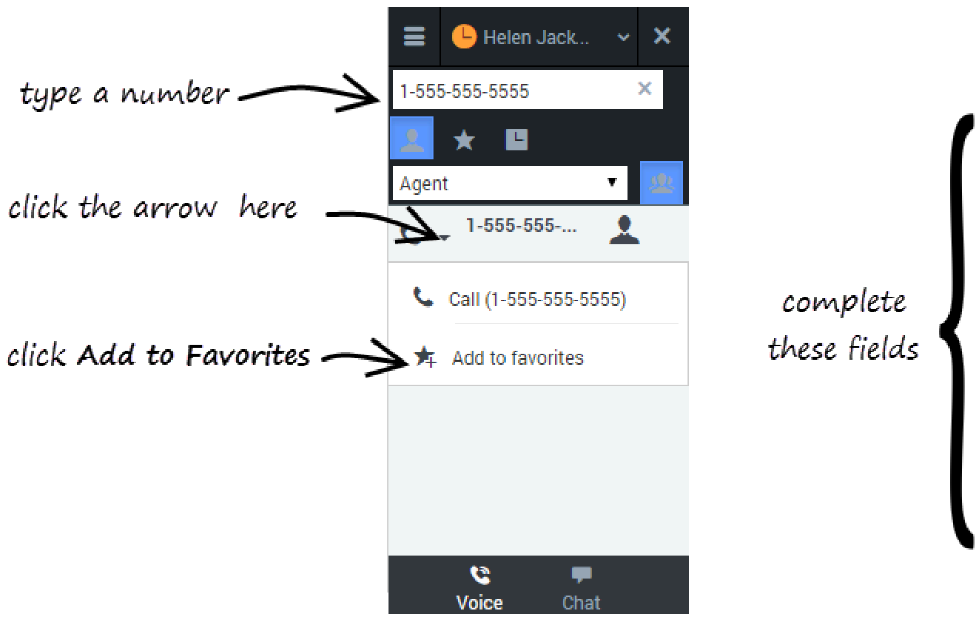
Open the **Add Contact** panel from the main menu and fill out all mandatory fields and the email address. After you click **Save**, a confirmation message is displayed.

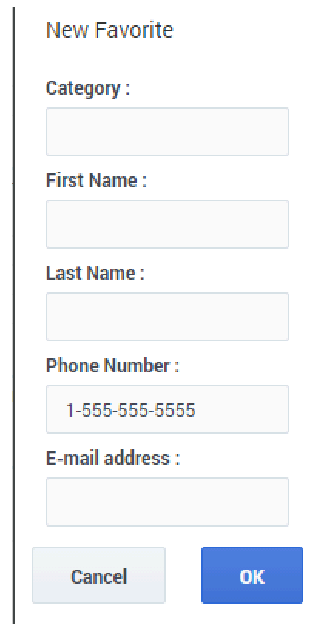
> ### Tip
> Ensure that you give your contact a unique name. If you have two more entries with

> the same name, it will be difficult for you to pick which one to call. If you have more than one contact name with the same name, consider appending the last name. For example: John Smith (cell) and John Smith (office).

You can further verify that the contact was saved by opening the Team Communicator and typing your new contact's name in the search bar. The contact should appear in the list of results.

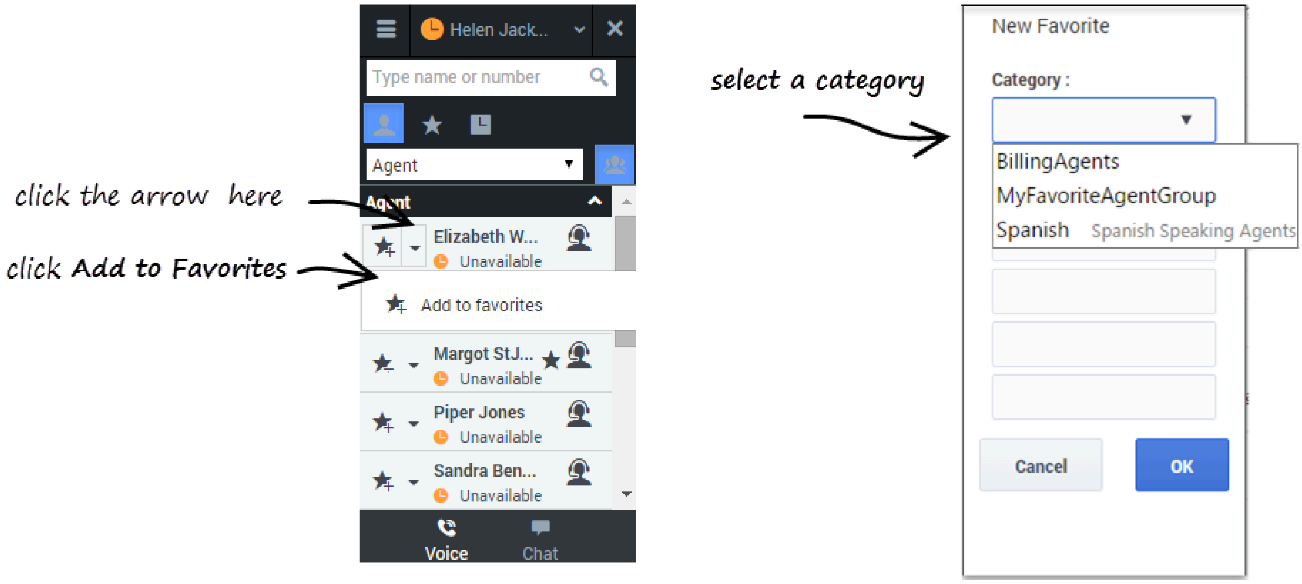
Add a new contact as a favorite





When you type a phone number in the Adapter, the Team Communicator recognizes whether the number is already in your contact list or not. If the typed number isn't already a contact, a new entry is added to the contact list. Click the drop-down menu next to the number and select **Add to Favorites**.

Mark an existing contact as a favorite



If you find yourself calling the same contact frequently, you can add the contact to your favorites list. Select the contact that you want to mark as a favorite, click the drop-down menu next to the number, and select **Add to Favorites**.

Viewing your reports (v8)

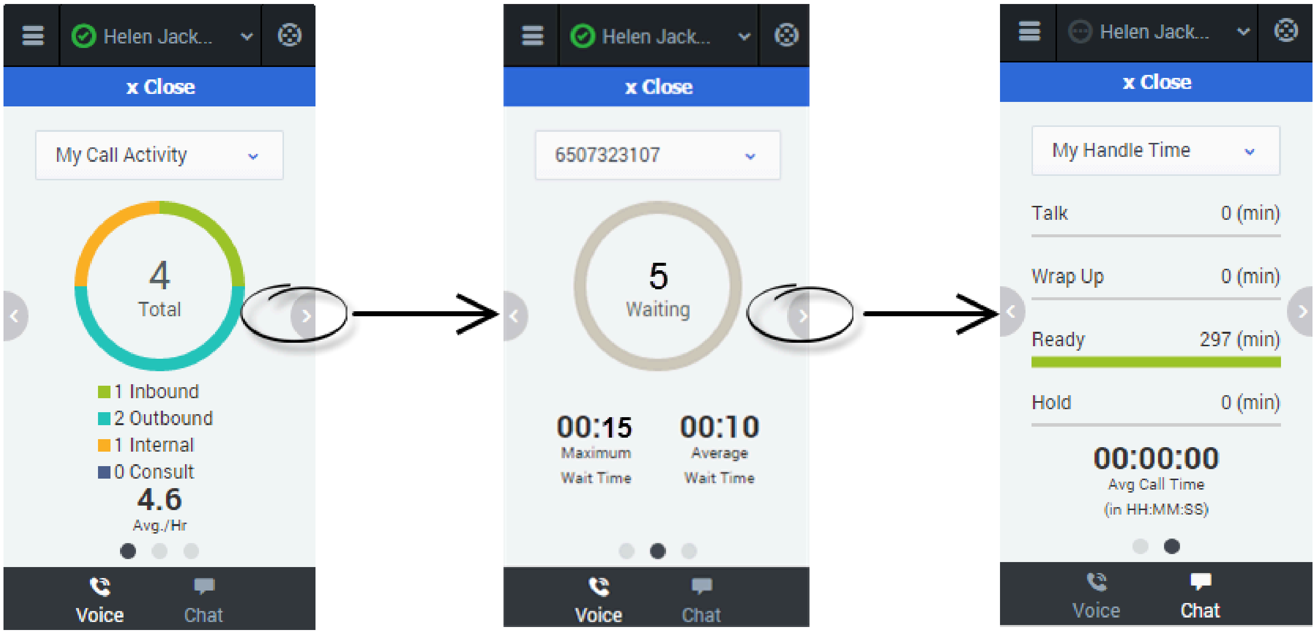
> ## Important
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

While you are working in the GPlus Adapter for Salesforce, you can view reports and statistics at any time. This information is important for you to see so that you can gauge the call wait times and monitor your Key Performance Indicators (KPIs).

> ## Important
> Reports are only available to you if Dashboards are enabled in your contact center. To enable this feature, you can log a care ticket .

Reports and statistics are available to you through the main menu. You can access the following adapter views:

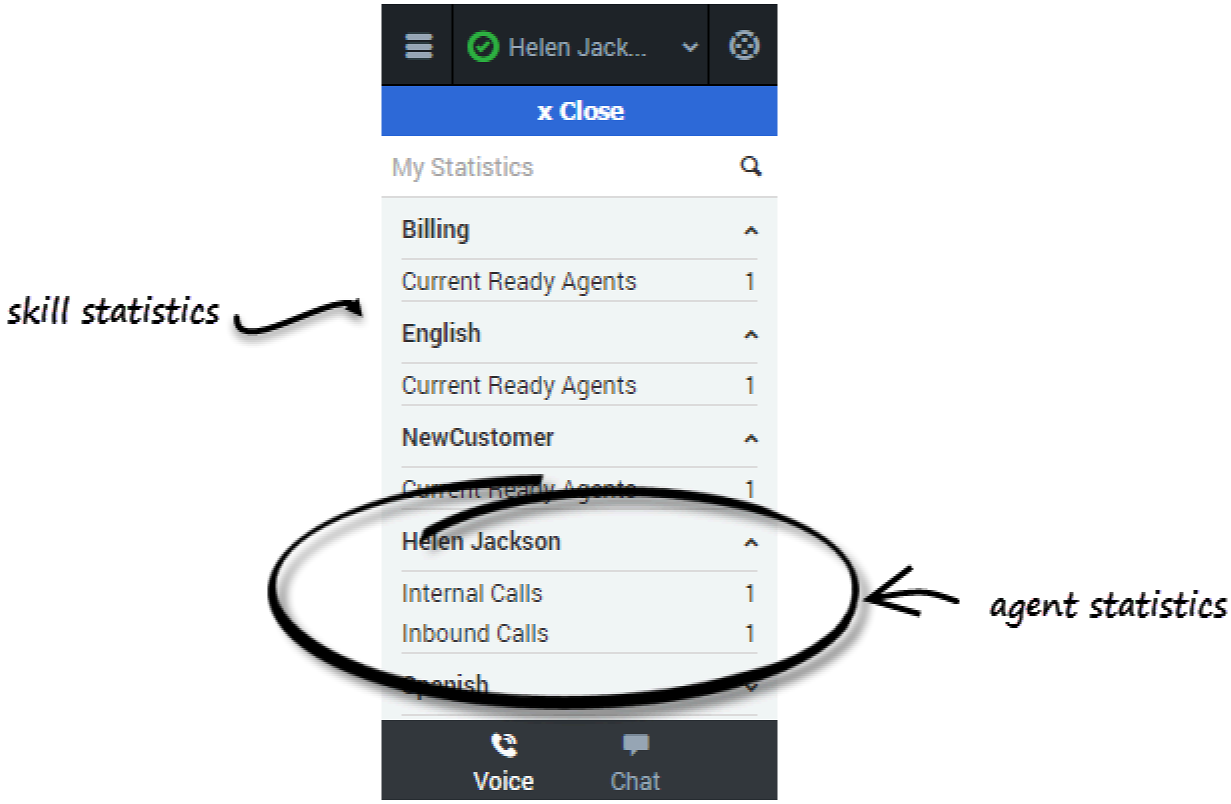
Reports view



The Reports view for voice interactions displays two pages: **My Call Activity** and **My Handle Time**. To navigate between the pages, use the arrows on the left and right side of the adapter.

- On the **My Call Activity** page, you can view a diagram that represents the averages of calls per hour and call time. Call Activity metrics include Total calls, Inbound calls, Outbound calls, Internal calls, and Consult calls.
- On the queue statistics page, you can select a queue from the drop-down list and see corresponding statistics such as the number of calls waiting, the maximum wait time, and the average wait time.
- On the **My Handle Time** page, you see metrics (in minutes) for Total time, Talk time, Wrap Up time, Ready time, and Hold time.

My Statistics view



The **My Statistics** page of the adapter displays the list of your statistics, otherwise known as Key Performance Indicators (KPIs).

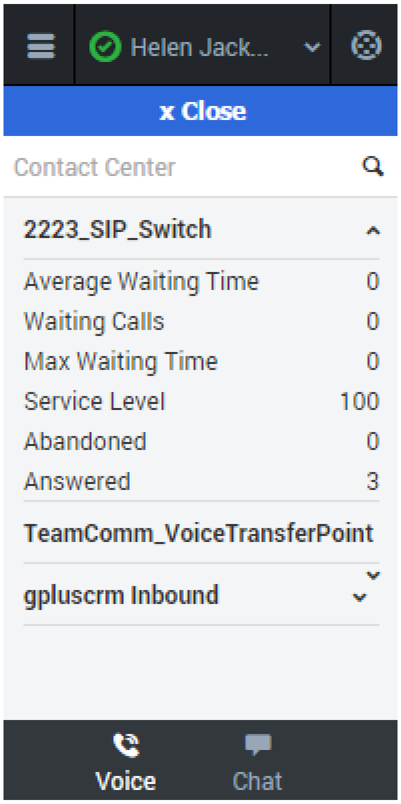
You can access the My Statistics page from the main menu at the top corner of the adapter. The statistics that you see depend on how your administrator has configured your account. For example, you might see agent statistics, skill statistics, and queue statistics. If your adapter does not include a My Statistics option on the main menu, your administrator might not have added any statistics to your agent account. In this case, contact your administrator.

You can expand sections by clicking the arrows next to the section title.

You can also type a value into the search field to filter the list of statistics that are displayed.

Note: Statistics about the Routing Points, Queues, and so on, are displayed in the Contact Center Statistics tab.

Contact Center Statistics view



The Contact Center page on the adapter displays a summary of your Routing Point metrics, which might include:

- Average Waiting Time
- Waiting Calls
- Max Wait Time
- Service Level
- Abandoned
- Answered

Your adapter might display more, or fewer, metrics depending on how your administrator has configured the Contact Center Statistics view.

You can also type a value into the search field to filter the list of statistics that are displayed.

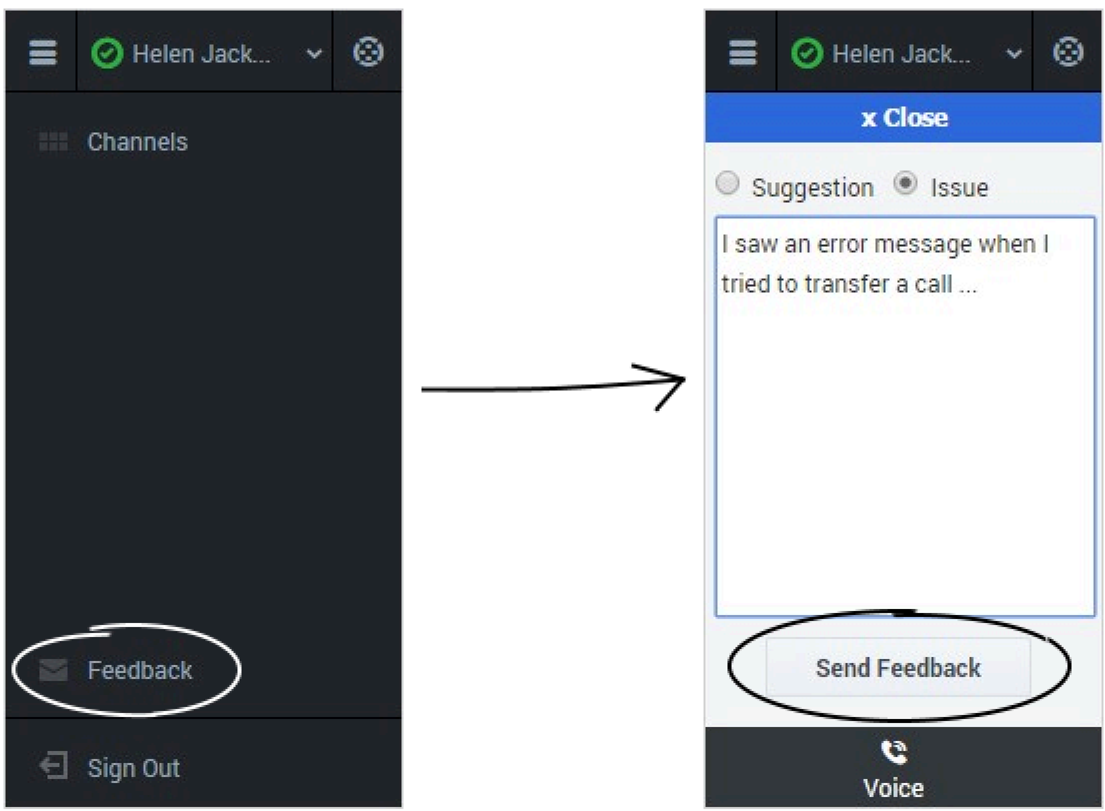
Submitting feedback (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop. These and other issues are problems that should be reported to supervisors.

How to provide feedback when something goes wrong



Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason the adapter becomes disconnected from your network and you have to close your browser and launch a new one to log in again, the adapter automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

Once a feedback report is logged to you as a supervisor, contact Genesys Customer Care as soon as possible to provide the reporting user's name and DN at the time of the incident, as well as the approximate time the incident occurred. The Customer Care agent should be able to retrieve the relevant log to determine what the issue might have been.

Gplus Adapter for Saleforce - Agent Desktop option (v8)

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Agent Desktop deployed in a sales or service console is an interaction management desktop that provides you with a robust subset of features that are available in the full Agent Desktop. This product adds more functionality to your softphone and seamlessly integrates the adapter activity in your sales or service console.

How do I access the Agent Desktop console?

Link to video

If the Agent Desktop is configured in your sales or service console, you will see a **Workspace** icon at the bottom right corner of your screen. Depending on how your console is configured, the **Workspace** icon might appear elsewhere on the screen.

If your sale or service console is configured for single sign-on, you don't need to log in into your Gplus Adapter. When you launch the adapter, you should have immediate access. If your console isn't configured for single sign-on, you are prompted to log in.

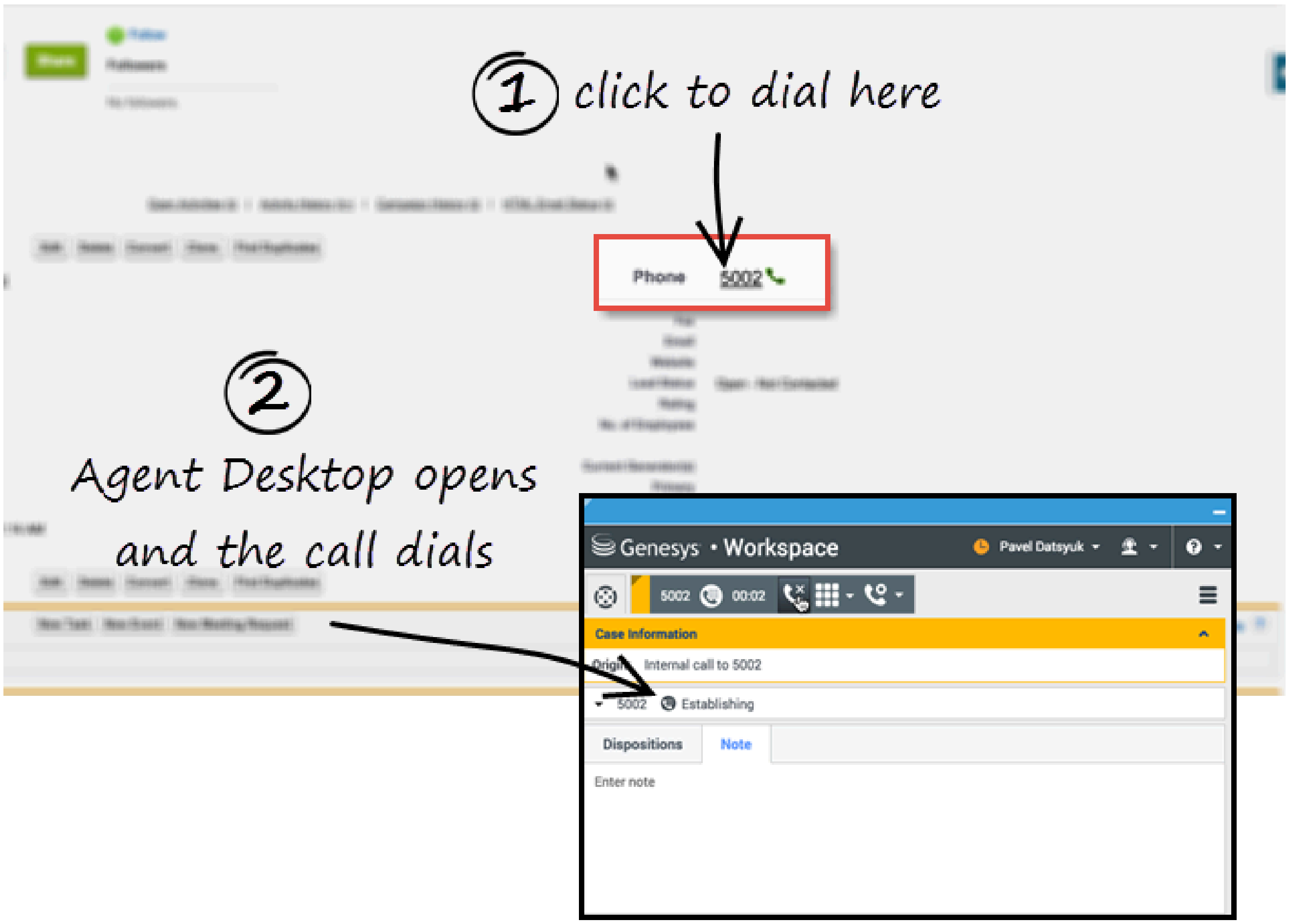
After you open the Agent Desktop, you can click anywhere in the title bar along the top of the Agent Desktop window to drag it to a new position within your browser window. You can also undock Agent Desktop by clicking the arrow at the top right of the window. This opens Agent Desktop in a new browser window that you can resize and drag to a new location. If you want to redock the window, just click the arrow again and the window returns to the standard location.

Supported features

The Agent Desktop console includes some features that integrate with your sales or service console. This means that actions that you take in the console or the Agent Desktop can be seamlessly passed to each other.

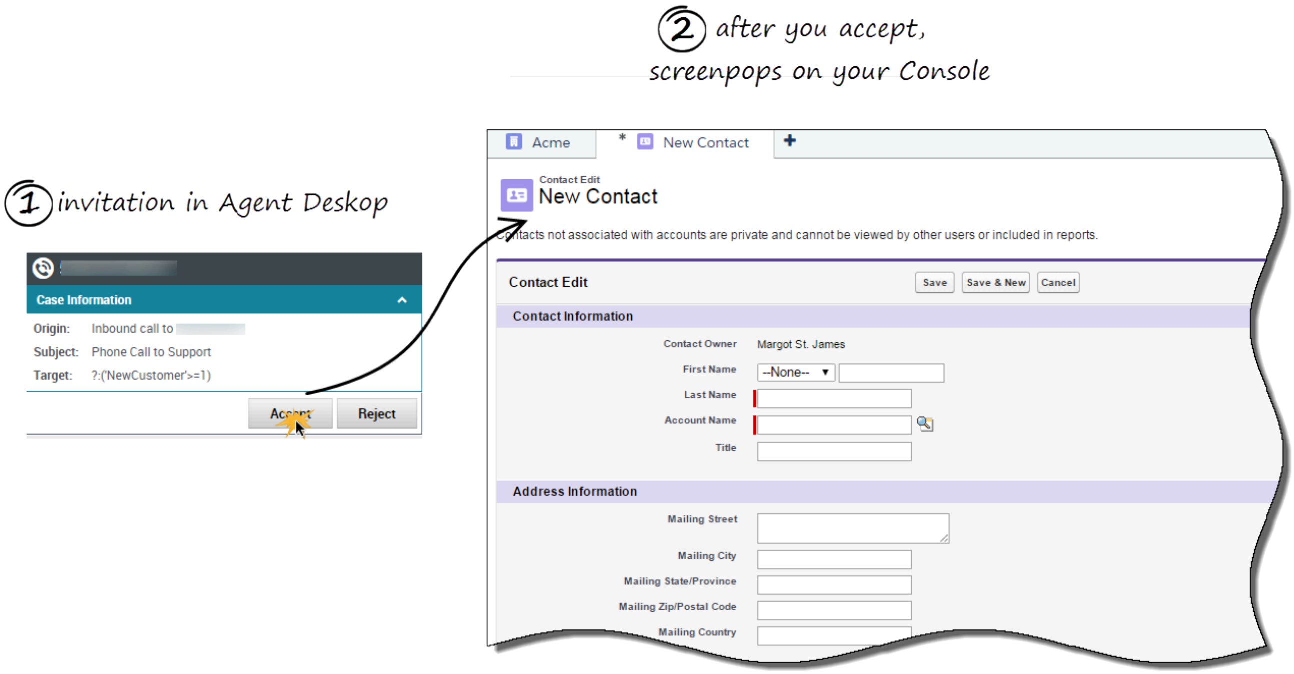
Integration points include:

Using click-to-dial



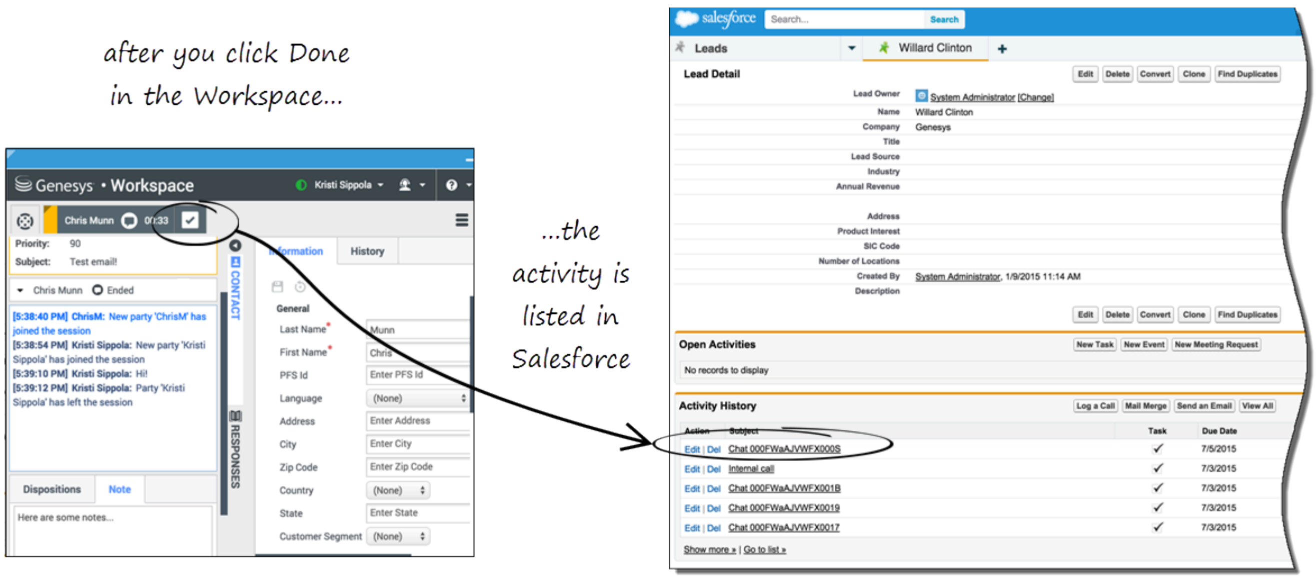
With click-to-dial, when you click a phone number in your console, the Agent Desktop automatically dials it and starts the call. For example, you might search for a contact and then click the related phone number.

Screen pops



Screen pops are contact records that are displayed when an agent receives or makes a call, chat or email in Agent Desktop. Your console can display one or more related records, depending on what information it has about the customer. For example, if a customer enters their case number before they talk to the agent, your console displays the case automatically when the agent receives or makes the call in Agent Desktop. If there is no contact information available, the **New Contact** page is displayed.

Activity history



When you mark a voice, chat, inbound email, or outbound campaign interactions as done (**Mark Done**), the details about the interaction are added to the contacts's activity history in Salesforce.

The types of information that are saved in the activity history include:

- call duration
- call type
- case data
- call UUID
- disposition
- notes
- time stamp
- chat transcript
- email subject
- email body

Tip

- For chat interactions, the **Call type** field shows all chats as **Inbound**.
- For emails, the **Call type** field shows **Inbound** for received emails and **Outbound** for sent emails and replies.

Voice calls or chats that could not be established are not saved in the history. When a voice call or chat involves multiple parties, such as consultations and conferences, the activity is saved as only one interaction.

> **Important**
> If you use the Mozillla Firefox web browser, issues might occur when you pop the Agent Desktop out to a new browser window or when you move the Agent Desktop within the Salesforce sales or service console.

Related documentation

- For agents—To learn how to use the Agent Desktop, see Agent Desktop help.

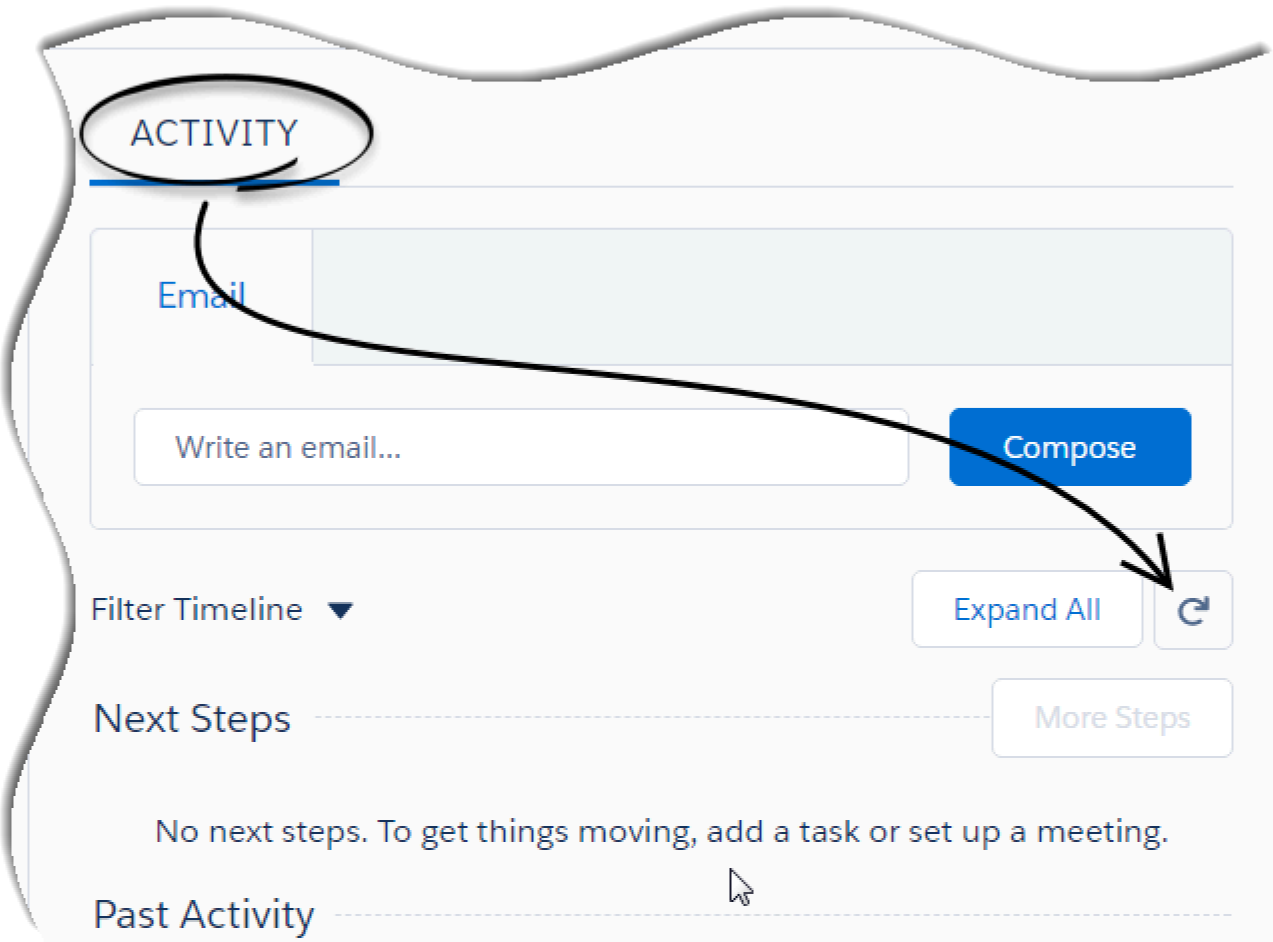
Lightning Experience (v8)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

The Lightning Experience functionality in Gplus Adapter for Saleforce - Agent Desktop option is the same as it is in Salesforce with the following exception(s):

Activity history



Accessing the activity record can be done slightly differently in Lightning Experience. There is a **Refresh Activity History** icon that can be used instead of navigating off the page, or refreshing:

1. Click **Contacts** from the menu bar.
2. Select the contact name.
3. Click the **Refresh Activity History** icon, in the **Activity** tab to review all **Past Activity**.
4. Clicking on an activity will open the **Task** window for that item.

Reporting

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Supervisors.

What kind of reports are available in Genesys Engage cloud?

To help you and the other Team Leads who supervise your agents make informed, timely business decisions, Genesys Engage cloud offers both real-time **dashboard** views and historical operational performance **reports**. These tools are described in the *Reporting in the cloud Guide*.

Genesys Engage cloud reporting tools provide easy-to-read visual summaries of the activity in your contact center, including information about agent performance, queues, and detailed information about interactions.

- Current events — To see information about customer interactions that are currently taking place, you can use *Genesys Pulse*: Real-time reporting with Genesys Pulse
- Both Current and Historical — *GVP* provides both historical and up to the minute reporting on the state of your contact center: GVP reporting
- Historical information — To see detailed information about what happened with customer interactions over a specified period of time, your environment includes either *Genesys Customer Experience Insights* (Genesys CX Insights) or *Genesys Interactive Insights* (GI2). If you are not sure which is available for your use, contact your administrator, or click **Reporting** in the Genesys Engage cloud Portal.
    - Historical reporting with Genesys CX Insights
    - Historical reporting with Genesys Interactive Insights
    - Genesys Info Mart historical database

Both real-time and historical reports are available using Web-based technology, so you can access contact center performance data anywhere, anytime.

Real-time reporting with Pulse

Genesys Pulse provides at-a-glance views of real-time contact center statistics on dashboards within the user interface.

GVP reporting

Genesys Voice Platform has many moving parts—individual components that perform different tasks during a call. GVP reports give you a diagnostic look at your contact center's performance, by monitoring how the components perform—by themselves and with each other. The goal is to improve your contact center's efficiency.

This page discusses how you can perform the following tasks with Genesys Voice Platform reports:

- Browse the Call Detail Records (CDRs) of in-progress and completed calls, filtering for the different components that process them. You can observe how each component is performing.
- Gather statistics on events such as call arrivals, call durations, and peak call volume— then sort or filter by IVR Profile, or by GVP component.
- Observe the success and failure rates for calls, and the IVR Actions that handle them.

Historical Reporting

Your environment includes either Genesys CX Insights or Genesys Interactive Insights, but not both.

Historical reporting with Genesys CX Insights

Use historical reports to visualize the performance of your contact center over time (as contrasted against real-time reports, which show what is going on right now. Read more: a discussion of the difference.)

The *Reporting in the cloud* guide provides detailed information about Genesys CX Insights:

- To learn how to use Genesys CX Insights, including how to access, run, read, or customize historical reports, start on the following page: Historical reporting with Genesys CX Insights.
- To view sample reports, or to read descriptions of report metrics, attributes or prompts, start on the following page: Historical reports included with Genesys CX Insights.

Historical reporting with Genesys Interactive Insights

Use historical reports to visualize the performance of your contact center over time (as contrasted against real-time reports, which show what is going on right now. Read more: a discussion of the difference.).

If you are not sure which historical reporting tool you have, contact your Genesys representative, or launch historical reporting from the Genesys Portal by clicking **Reporting**.

The *Reporting in the cloud* guide provides detailed information about Genesys Interactive Insights:

- To learn how to use Genesys Interactive Insights, including how to access, run, read, or customize historical reports, start on the following page: Historical reporting with Genesys Interactive Insights.
- To view sample reports, or to read descriptions of report metrics, attributes or prompts, start on the following page: Historical reports included with Genesys Interactive Insights.

Genesys Info Mart historical database

Genesys Info Mart is the enterprise-level Genesys application behind the historical reports in your cloud deployment. Genesys Info Mart receives interaction data from various upstream enterprise-level Genesys applications, then processes the low-level data to produce a data mart that Genesys Engage cloud uses for contact center historical reporting. Genesys Interactive Insights relies on Genesys Info Mart.

This page introduces the Genesys Info Mart Historical Database Reference.

How do I learn more about data behind reports?

The detailed data behind historical reports is fairly complex. If Data Export capability is available in your cloud deployment, use the Genesys Info Mart Historical Database Reference to learn about the dimensional model of the Genesys historical database (called the Info Mart database), from which fact and dimension data is exported.

What is Data Export?

Data Export capability periodically copies the data that is stored in the Info Mart database into local .csv files, one file per table, so that the historical reporting data is available for further import into a data warehouse. Data Export capability is available in certain Genesys Engage cloud deployments; contact your Genesys representative for more information or see About Data Export Capability.

Historical reporting for Genesys Designer applications

Some Genesys Designer Analytics tool data is stored in the Genesys Info Mart database for historical reporting purposes. In Genesys Designer Analytics tool, this data is displayed on the Session Detail Records dashboard.

This data is stored as Session Detail Records (SDR) in Genesys Info Mart. If the Data Export feature is available in your cloud deployment, the data from the **SDR_*** tables is included in the export.

Workforce Management

> **Important**
>
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Genesys Workforce Management (WFM) provides a sophisticated set of management tools so you can better manage your contact center workforce while still delivering top service to your customers. It allows you to easily manage your agents, schedules, and forecasts, and provides real-time monitoring of contact center performance and agent-adherence.

Your agents will have the ability to request time off or specific working hours, bid on proposed schedules, and even trade their schedules with other agents. All while maintaining optimal staffing levels.

WFM makes it easy for you to manage agents of all skill levels, in contact centers that are using single media formats (like voice calls) or a variety of media formats (such as voice calls and emails).

Current documentation set for Workforce Management

Workforce Management Help—Overview and instruction on how to use Workforce Management 8.5.1.

> **Important**
>
> If you are using Workforce Management 8.5.2, refer to the Workforce Management Web for Supervisors (Classic) Help.

Workforce Management Product Alerts

- **Google Chrome version 45 ends support for Java Plug-ins**—WFM Web will no longer work with Chrome v45 and later, due to Chrome's end of support for Java Plug-ins. If you are running WFM Web on Chrome v45 or later, Genesys recommends you use either Internet Explorer or Firefox.
- **Limitation for WFM Web for in Google Chrome Stable Channel update version 42**—By default, this browser version blocks the Java plug-in with no pop-up or other indication.

  Workforce Management supports Chrome, which means:

  - In WFM Web —Attempts to invoke Java applet subsystems prompts a message (after a long delay) that Java is not detected.

Resolution:
Starting with Chrome version 42, an additional configuration step is required to continue using NPAPI plug-ins.

To enable NPAPI in Chrome Version 42 and later:

1. In your URL bar, enter: `chrome://flags/#enable-npapi`.
2. Click the **Enable** link for the **Enable NPAPI** configuration option.
3. Click the **Relaunch** button that appears at the bottom of the **Configuration** page.

Official source from Oracle: www.java.com