Unified Contact Center Express

Finesse Agent Training

Version 12.5

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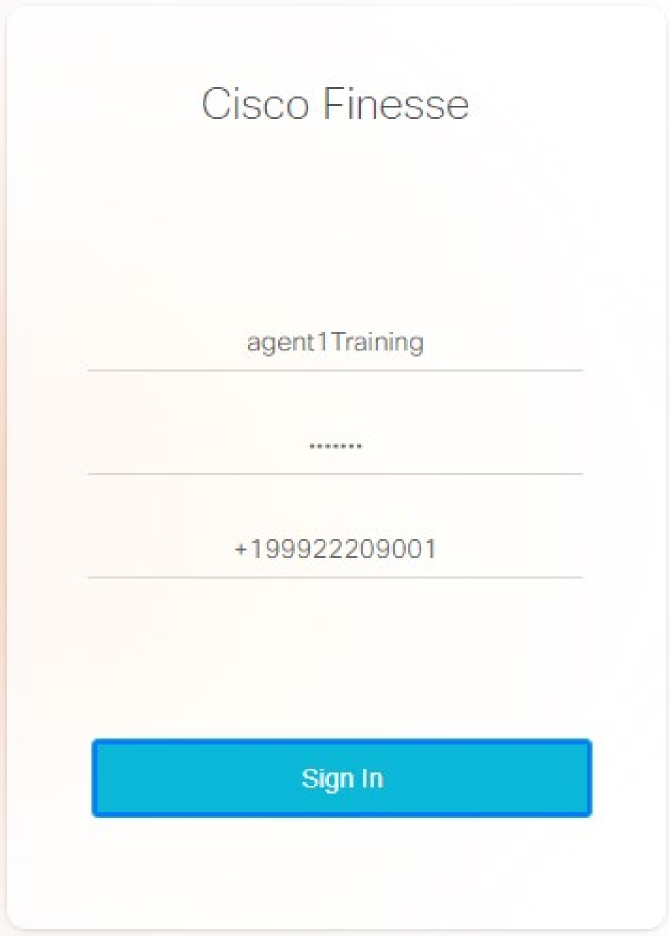
Agent Desktop Login/Logout

This section will explain how to log into and out of Finesse, the web-based agent desktop.

Login

In the web browser address bar, type https://<ccagent.utoledo.edu>:8445/desktop (or https://<ccagent.utoledo.edu>:8445/desktop if the primary URL doesn't work). The Desktop Login screen shown below appears. Enter your username, password, and ACD extension; click **OK**. The username is case sensitive and your credentials are the same as your network (PC login) credentials.

Note: If you are using Extension Mobility, make sure you are logged into a phone first.



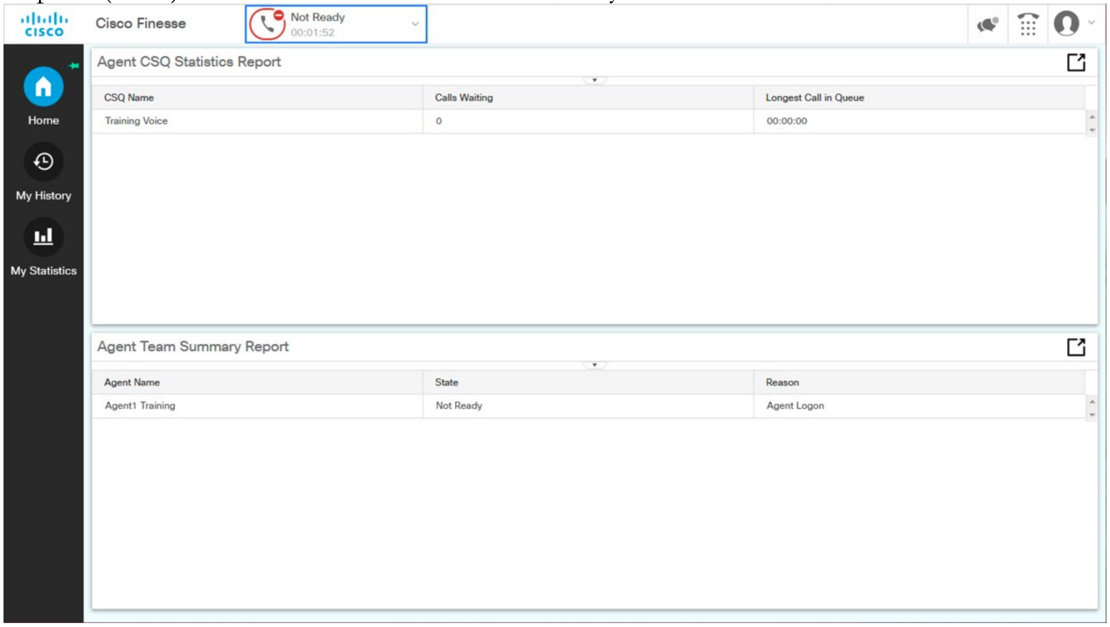
agent1Training

•••••••

+199922209001

At first sign-in, Chrome and Firefox will prompt to allow notifications; enable this feature.

Upon successful login, the desktop toolbar will be displayed as depicted below. The UCC Express (ACD) extension will be set to the Not Ready state so it will not receive calls.


cisco
Cisco Finesse
Not Ready
00:01:52
Home
My History
My Statistics

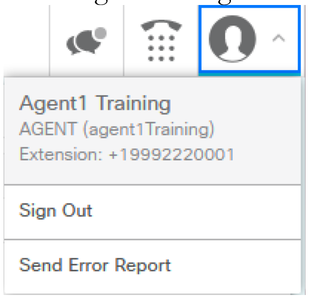
Agent CSQ Statistics Report

CSQ Name	Calls Waiting	Longest Call in Queue
Training Voice	0	00:00:00

Agent Team Summary Report

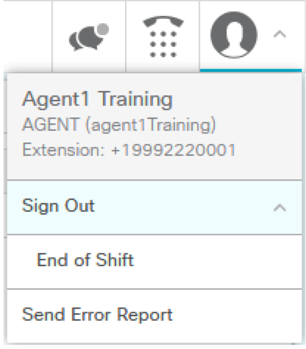
Agent Name	State	Reason
Agent1 Training	Not Ready	Agent Logon

To logout of the desktop, click the User Options icon in the top right corner of the window and select Sign Out. Sign Out can ONLY be performed when the agent is Not Ready.


Agent1 Training
AGENT (agent1Training)
Extension: +19992220001

Sign Out
Send Error Report

If the administrator has configured Sign Out Codes, pick the desired Sign Out Code.


Agent1 Training
AGENT (agent1Training)
Extension: +19992220001

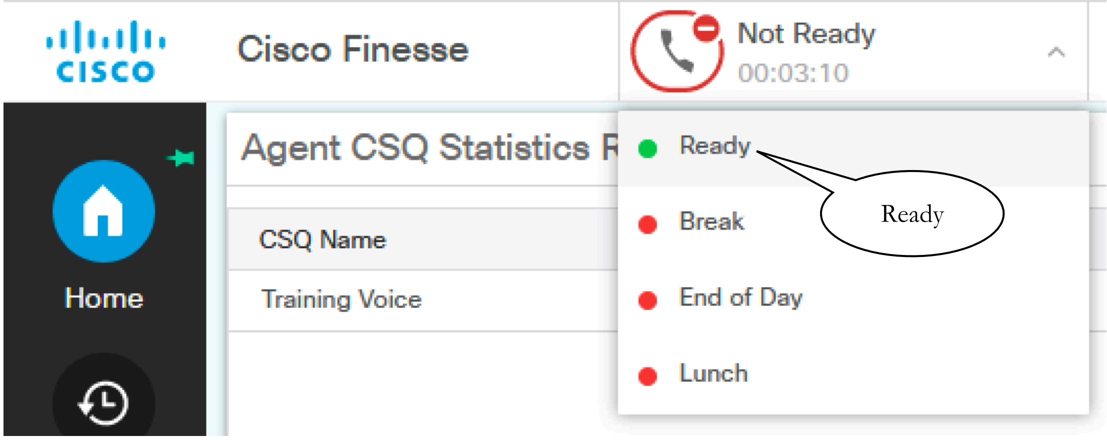
Sign Out
End of Shift
Send Error Report

Make Agent Available/Unavailable

This section will help agents manage their Ready (available for calls) and Not Ready (unavailable for calls) states. There is also a third state called Wrap-Up where the agent is unavailable to take calls, but this state and duration are bound to the agent's previous ACD call.

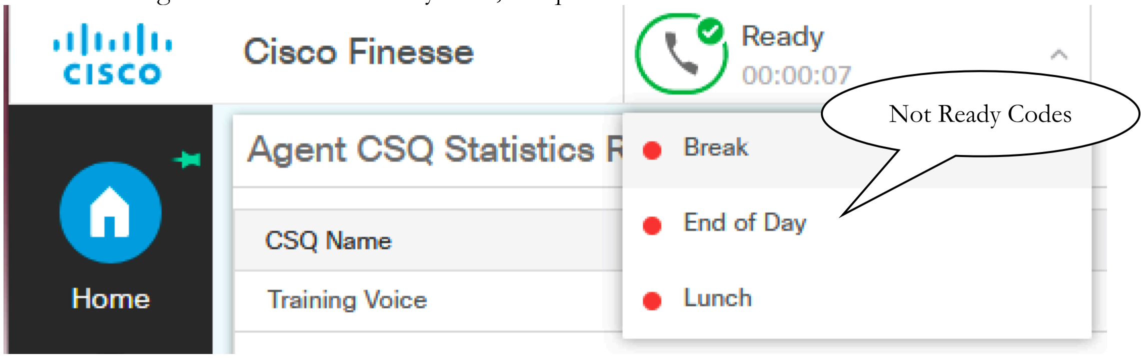
Ready (Available)

To accept incoming queue calls, click the agent state drop-down menu and select **Ready**.


Cisco Finesse
Not Ready
00:03:10
Agent CSQ Statistics R
CSQ Name
Training Voice
Home
Ready
Break
End of Day
Lunch
Ready

Not Ready (Unavailable)

To go unavailable for queue calls, click the agent state drop-down menu and select a **Not Ready** state. When agents are in a Not Ready state, no queued calls will be sent to them.


Cisco Finesse
Ready
00:00:07
Not Ready Codes
Agent CSQ Statistics R
CSQ Name
Training Voice
Home
Break
End of Day
Lunch

There are different types of **Not Ready** states from which to choose; select the desired reason code state to make yourself Not Ready.

Reserved, Talking, and Wrap-Up

These are automatic state changes. **Reserved** is only active when the agent is receiving a call from the queue. The state is changed to **Talking** when the agent answers an inbound queue call.

If Automatic Wrap-Up is Enabled: Once a queue call has concluded, the state will change to **Wrap-Up** for XX seconds, then the state will change back to **Ready**, unless the agent selects **Not Ready** prior to the Wrap-Up timer expiring.

If "Force Wrap-Up Reason" is enabled, the agent must pick a Wrap-Up Code before they will be allowed to change state.

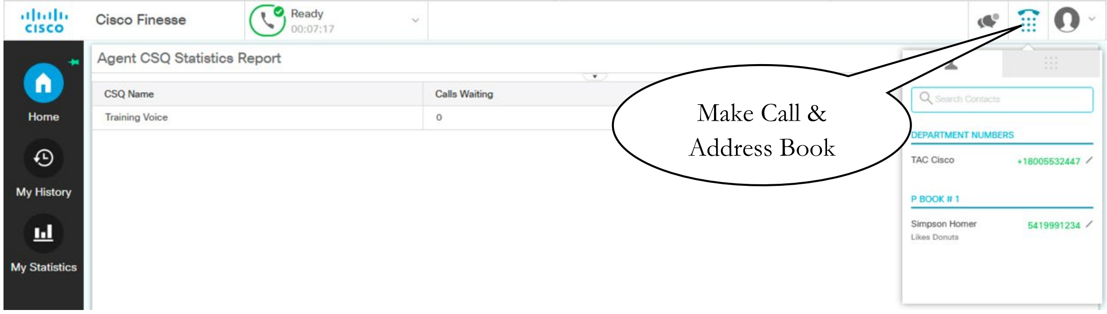
In order to transition straight from **Talking** to **Not Ready**, agents can set their state to **Not Ready** while in the **Talking** state. This will skip the **Wrap-Up** state; agents should select the appropriate Wrap-Up Code(s) before ending the queue call.

Inbound Voice Calls

This section will help explain how to deal with online phone books, placing and receiving calls, using hold functionality, and transferring and conferencing calls.

Phone Books

Phone books can be used for accessing internal or public phone numbers defined by the administrator; they help ease outbound calling by allowing groups of agents with common outbound calls to select and make calls from Finesse with just a few clicks. Phone books can be accessed while making an outbound call, transferring a call, or conferencing a call.


Cisco Finesse
Ready
00:07:17
Home
My History
My Statistics
Make Call & Address Book
Search Contacts

Agent CSQ Statistics Report

CSQ Name	Calls Waiting
Training Voice	0

DEPARTMENT NUMBERS

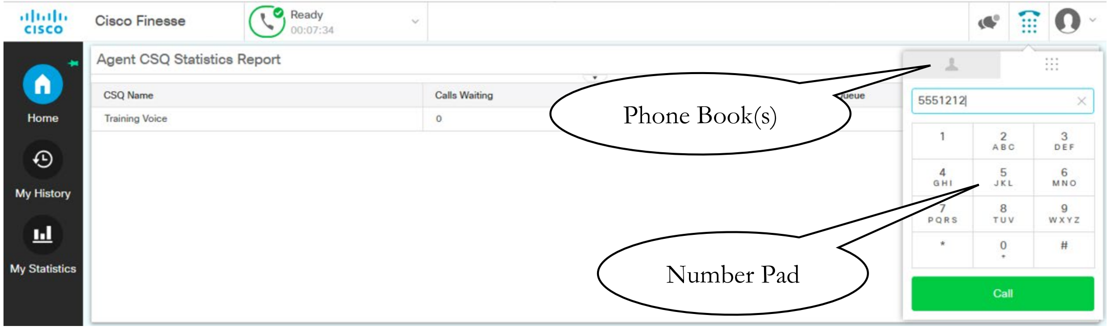
TAC Cisco	+18005532447

P BOOK # 1

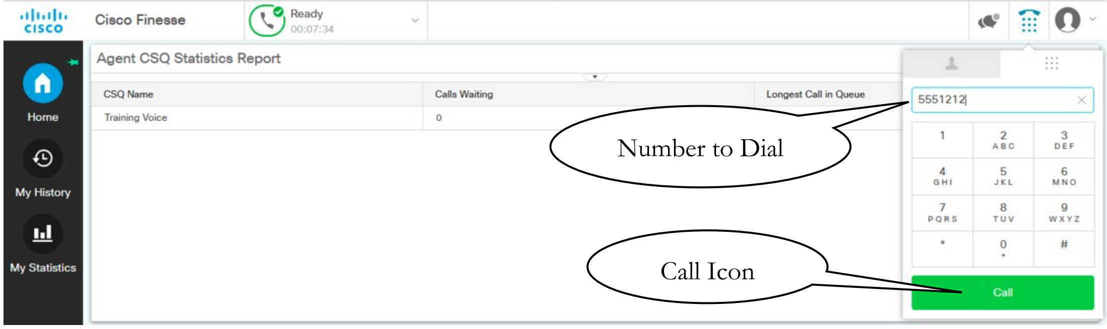
Simpson Homer Likes Donuts	5419991234

Make Outbound Calls

Click the **Make Call** icon from either a Ready or Not Ready state when there are no active or held calls.

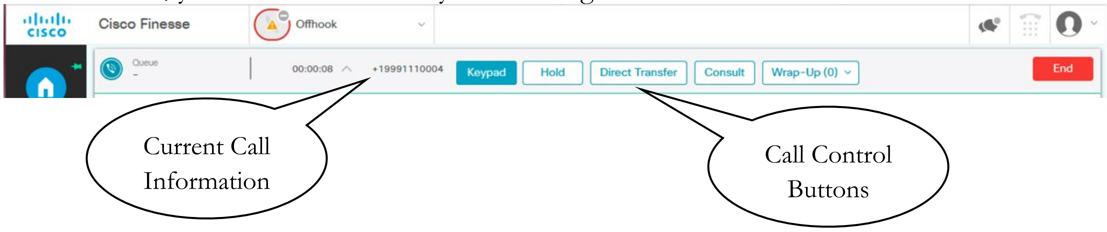

Cisco Finesse
Ready
00:07:34
Home
My History
My Statistics
Agent CSQ Statistics Report
CSQ Name
Calls Waiting
Training Voice
0
5551212
1
2 ABC
3 DEF
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
*
0
#
Call
Phone Book(s)
Number Pad

A window displays, and the phone number can be selected or entered and dialed. Click the **Call** icon to make the outbound call.


Cisco Finesse
Ready
00:07:34
Home
My History
My Statistics
Agent CSQ Statistics Report
5551212
1
2 ABC
3 DEF
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
*
0
#
Call
Number to Dial
Call Icon

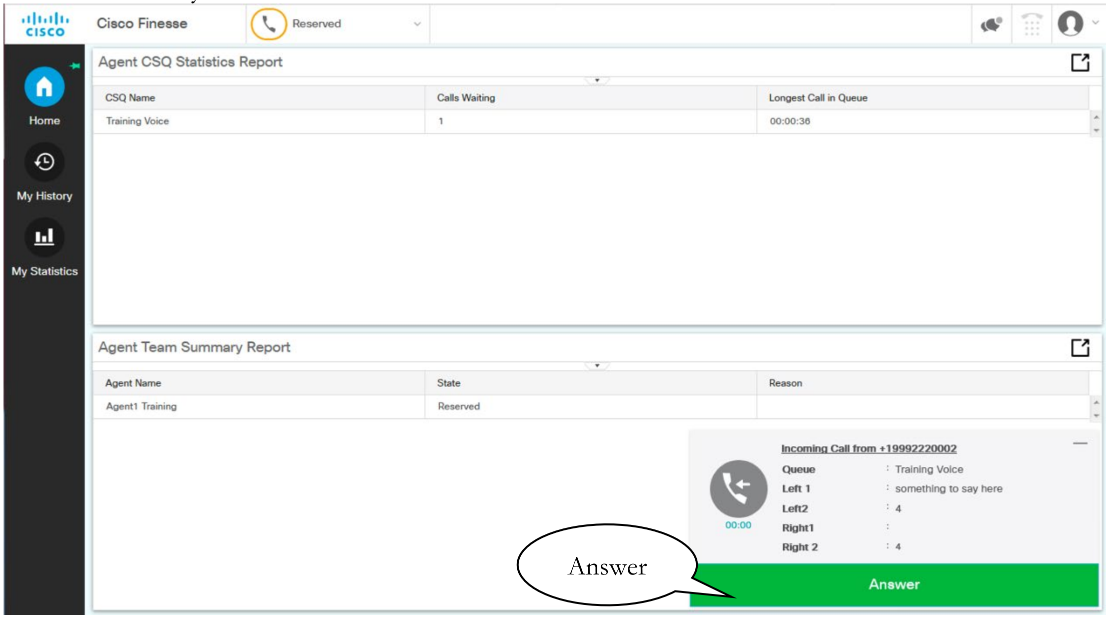
CSQ Name	Calls Waiting	Longest Call in Queue
Training Voice	0	

When an outbound call is placed, the other icons on the toolbar are activated as shown in the picture below. If you are in the Ready state, it will automatically place you into the Not Ready – Offhook state; you will return to Ready after ending the outbound call.


Cisco Finesse
Offhook
Queue
-
00:00:08
+19991110004
Keypad
Hold
Direct Transfer
Consult
Wrap-Up (0)
End
Current Call Information
Call Control Buttons

Answer Incoming Calls

When receiving a call from the queue, the agent is put in a **Reserved** (ringing) state. In Firefox or Chrome, you will see a popover window in the bottom right. To answer the incoming call, click the **Answer** button on the Finesse popover or simply answer the call on the phone. Note that the popover will always show the Call Header field (the queue name) as well as up to five chosen Call Body fields for this call.



Agent CSQ Statistics Report

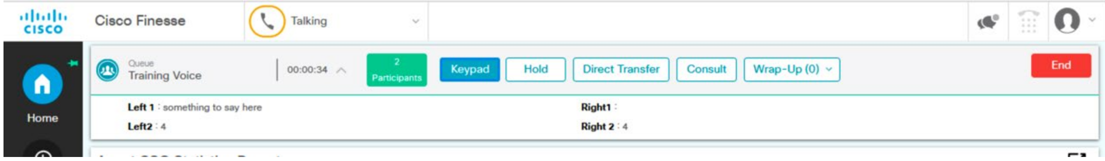
CSQ Name	Calls Waiting	Longest Call in Queue
Training Voice	1	00:00:36

Agent Team Summary Report

Agent Name	State	Reason
Agent1 Training	Reserved	

Incoming Call from +19992220002
00:00
Queue : Training Voice
Left 1 : something to say here
Left2 : 4
Right1 :
Right 2 : 4

Once the **Answer** button is clicked (or the call is answered via the phone), the call is active (the agent is now in a **Talking** state), and other buttons such as **Keypad**, **Hold**, **Direct Transfer**, **Consult**, and **Wrap-Up** are all enabled. There is also an **End** button on the far right.



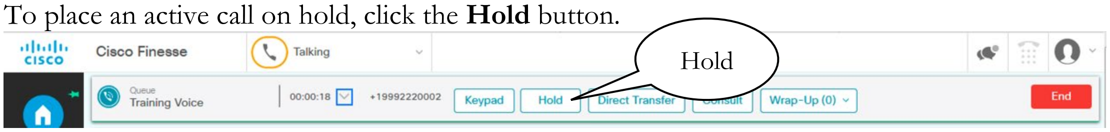
Queue Training Voice
00:00:34
Left 1 : something to say here
Left2 : 4
Right1 :
Right 2 : 4

In the same row as the Call Control buttons are call information fields. The one to the far left is the Call Header field - the same field and value as the popover. To the right of that is the call duration timer (00:00:34), which increments through the call ending and to the end of the Wrap-Up state. This is the call's handle time. Between the timer and the call control buttons is the caller's phone number.

The white space below that is the Call Variable layout section. Each column can have up to ten rows of values; the above pictures shows two rows in each column.

Place a Call on Hold

To place an active call on hold, click the **Hold** button.



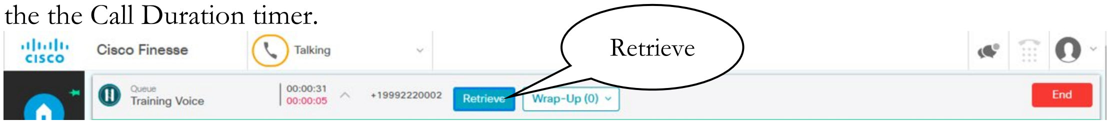
Hold

Cisco Finesse
Talking
Queue
Training Voice
00:00:18
+19992220002
Keypad
Hold
Direct Transfer
Consult
Wrap-Up (0)
End

The call will change to the On Hold state. The **Keypad** and **Consult** icons will disappear and the **Hold** button becomes the **Retrieve** button.

Retrieve a Held Call

To retrieve the held call, click the **Retrieve** button. Note that the hold time displays in red below the the Call Duration timer.

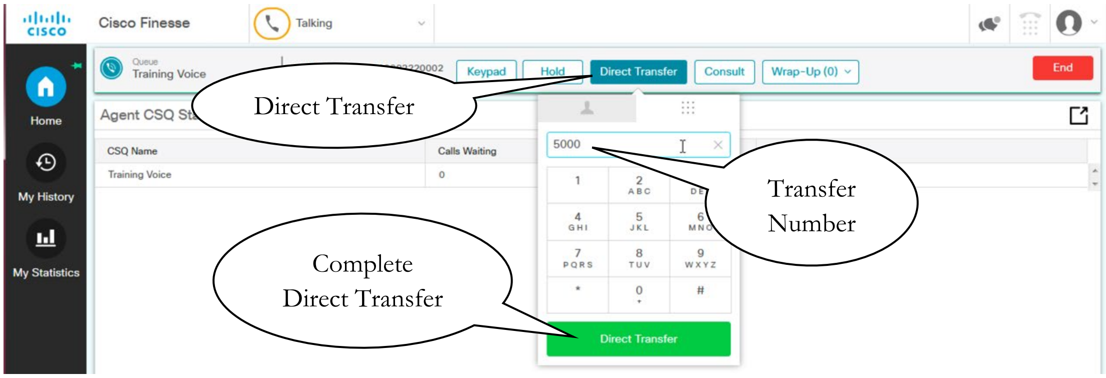


Retrieve

Cisco Finesse
Talking
Queue
Training Voice
00:00:31
00:00:05
+19992220002
Retrieve
Wrap-Up (0)
End

Direct (Blind) Transfer a Call

If you wish to blind transfer a call to someone, press the **Direct Transfer** icon and enter the number to which you'd like to transfer; complete the transfer by pressing the green **Direct Transfer** button.



Direct Transfer

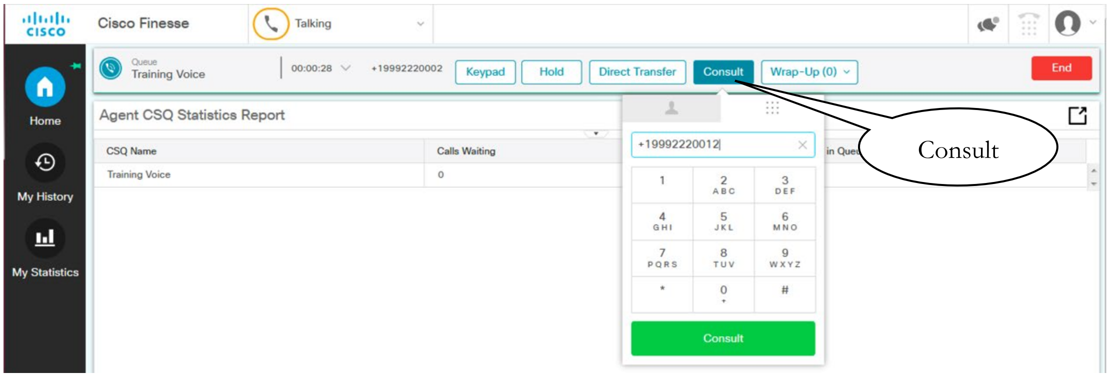
Transfer Number

Complete Direct Transfer

Cisco Finesse
Talking
Queue
Training Voice
Keypad
Hold
Direct Transfer
Consult
Wrap-Up (0)
End
Home
My History
My Statistics
Agent CSQ St
CSQ Name
Calls Waiting
Training Voice
0
5000
1
2 ABC
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
*
0
#
Direct Transfer

Conference/Consult Transfer a Call

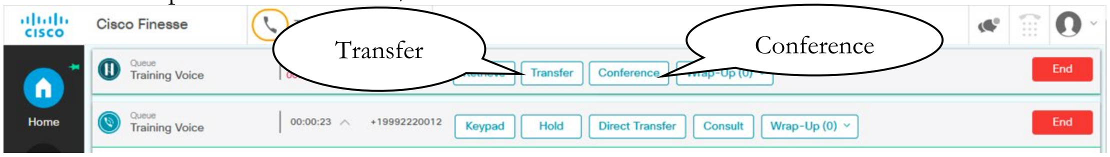
To conference or supervise transfer a call, click the **Consult** icon to initiate the conference or transfer of an active call. The dialing gadget displays with the phone directory. A phone number can be selected/entered in multiple ways and can then be dialed by clicking the **Consult** button. This will place the active call on hold and initiate a new call to the selected/entered phone number.


cisco
Cisco Finesse
Talking
Home
My History
My Statistics
Queue
Training Voice
00:00:28
+19992220002
Keypad
Hold
Direct Transfer
Consult
Wrap-Up (0)
End
Agent CSQ Statistics Report
CSQ Name
Calls Waiting
in Queu
Training Voice
0
+19992220012
1
2 ABC
3 DEF
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
*
0 +
#
Consult

Consult

No call control buttons will be available while the called party's phone is ringing.

When the called party's phone is answered (displayed in the lower Call Control bar); the **Transfer** and **Conference** buttons become available on the upper bar**.** Click the appropriate button to complete the conference/transfer.


cisco
Cisco Finesse
Home
Queue
Training Voice
Retrieve
Transfer
Conference
Wrap-Up (0)
End
Queue
Training Voice
00:00:23
+19992220012
Keypad
Hold
Direct Transfer
Consult
Wrap-Up (0)
End

Transfer

Conference

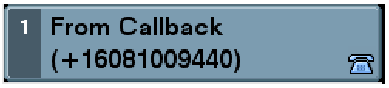
More phone numbers can be added to a conference by repeating the process of dialing and adding to the conference as shown above.

Callbacks

Courtesy Callback

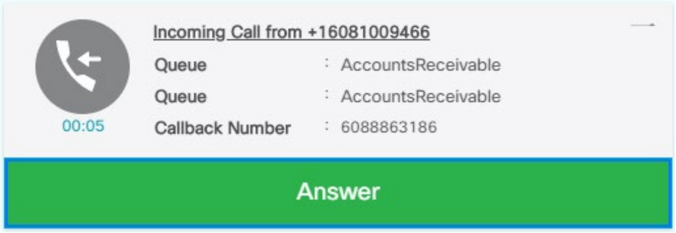
A caller can leave a 10-digit callback number along with up to a 30 second message. The callback request then waits in queue for the next available rep to answer the call.

When you receive a courtesy callback call, you will see "Callback" as the caller ID on your phone (you can ignore the random dummy number).



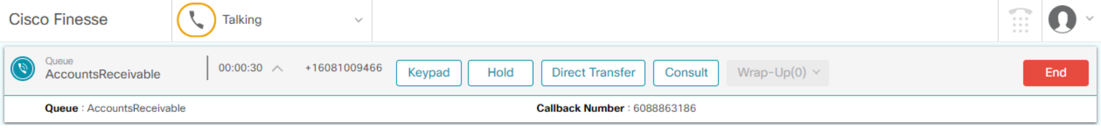
1 From Callback
(+16081009440)

Finesse will display the caller's queue and requested callback number in the popover while the call is ringing on your phone:



Incoming Call from +16081009466
Queue : AccountsReceivable
Queue : AccountsReceivable
Callback Number : 6088863186

Finesse will display the same information in the Header once the call is answered:



Queue
AccountsReceivable
00:00:30
+16081009466

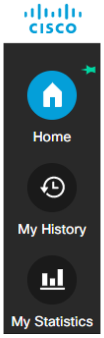
Queue : AccountsReceivable
Callback Number : 6088863186

After answering the call, you'll hear a prompt that a caller has requested a callback. Press any key to listen to the caller's message. After hearing the message, you can press 1 to repeat it or 2 to initiate the callback.

Reports

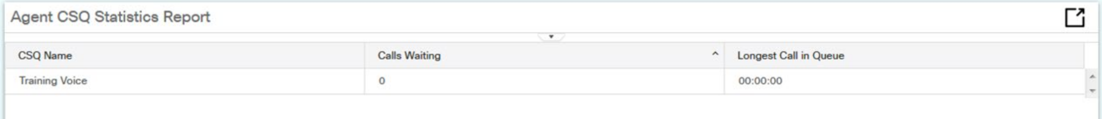
Home Tab Reports

Click the **Home** button in the Navigation Bar (or press Ctrl + Alt + 1) to view team and queue statistics.



Agent CSQ Statistics Report

The **Agent CSQ Statistics Report** presents the current call queue statistics. It will only display queues for which you are a member.

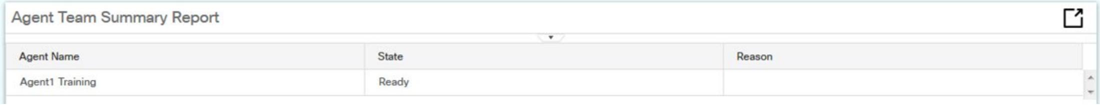


Agent CSQ Statistics Report

CSQ Name	Calls Waiting	Longest Call in Queue
Training Voice	0	00:00:00

Agent Team Summary Report

The **Agent Team Summary Report** presents the agent state and the reason (where applicable); an agent can view details of all the agents in their team.

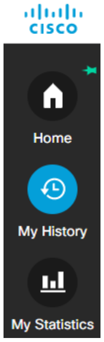


Agent Team Summary Report

Agent Name	State	Reason
Agent1 Training	Ready	

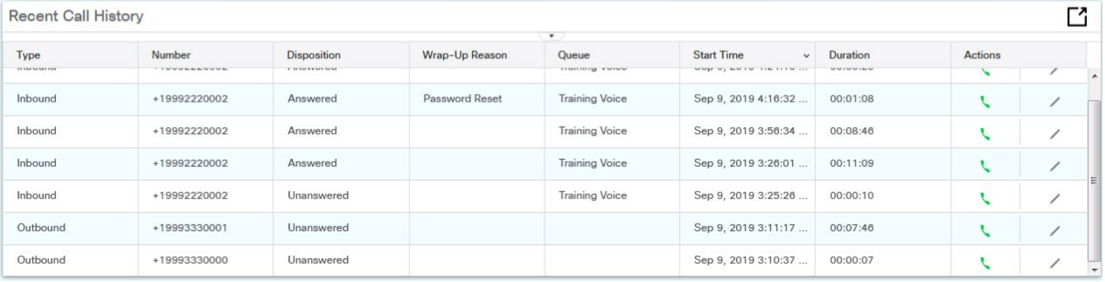
My History Tab Reports

Click the **My History** button in the Navigation Bar (or press Ctrl + Alt + 2) to view agent call and state histories.



Recent Call History

Recent Call History presents inbound and outbound call information for all calls on your ACD line since midnight. It also provides Wrap-Up Reason (where applicable) and queue information for inbound calls. You can use the green phone icon in the "Actions" column to automatically dial the telephone number associated with that row. You can use the gray pencil icon to edit the number before calling it, in case you need to prefix a dial code.

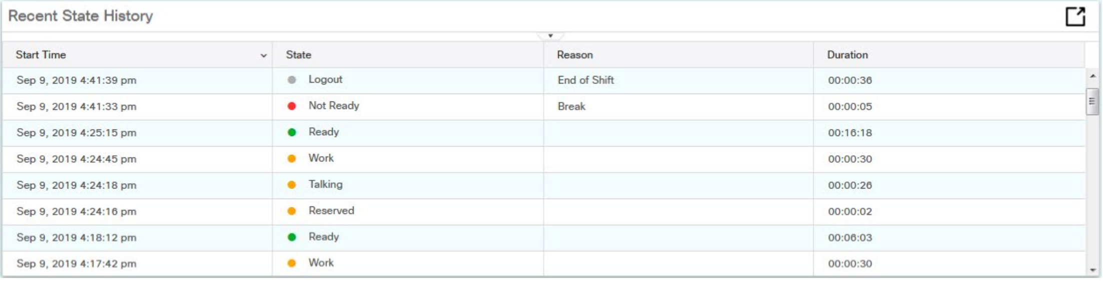


Recent Call History

Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Actions
Inbound	+19992220002	Answered	Password Reset	Training Voice	Sep 9, 2019 4:16:32 ...	00:01:08	☎ ✎
Inbound	+19992220002	Answered		Training Voice	Sep 9, 2019 3:56:34 ...	00:08:46	☎ ✎
Inbound	+19992220002	Answered		Training Voice	Sep 9, 2019 3:26:01 ...	00:11:09	☎ ✎
Inbound	+19992220002	Unanswered		Training Voice	Sep 9, 2019 3:25:26 ...	00:00:10	☎ ✎
Outbound	+19993330001	Unanswered			Sep 9, 2019 3:11:17 ...	00:07:46	☎ ✎
Outbound	+19993330000	Unanswered			Sep 9, 2019 3:10:37 ...	00:00:07	☎ ✎

Recent State History

Recent State History presents your agent state, duration in that state, and the reason (where applicable) since midnight.

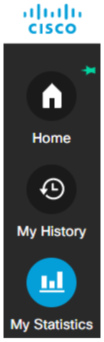


Recent State History

Start Time	State	Reason	Duration
Sep 9, 2019 4:41:39 pm	● Logout	End of Shift	00:00:36
Sep 9, 2019 4:41:33 pm	● Not Ready	Break	00:00:05
Sep 9, 2019 4:25:15 pm	● Ready		00:16:18
Sep 9, 2019 4:24:45 pm	● Work		00:00:30
Sep 9, 2019 4:24:18 pm	● Talking		00:00:26
Sep 9, 2019 4:24:16 pm	● Reserved		00:00:02
Sep 9, 2019 4:18:12 pm	● Ready		00:06:03
Sep 9, 2019 4:17:42 pm	● Work		00:00:30

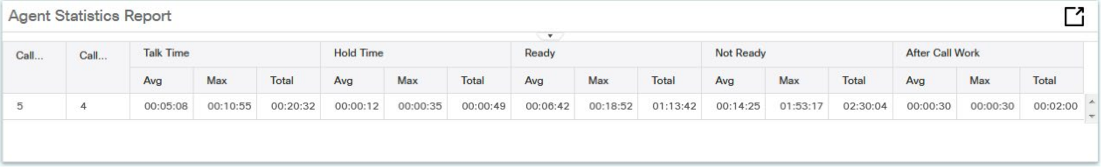
My Statistics Tab Reports

Click the **My Statistics** button in the Navigation Bar (or press Ctrl + Alt + 3) to view agent statistics.



Agent Statistics Report

The **Agent Statistics Report** presents your performance statistics (calls offered/handled, talk times, Ready/Not Ready times, etc.) for all ACD calls since midnight.



Agent Statistics Report

Call...	Call...	Talk Time			Hold Time			Ready			Not Ready			After Call Work		
		Avg	Max	Total	Avg	Max	Total	Avg	Max	Total	Avg	Max	Total	Avg	Max	Total
5	4	00:05:08	00:10:55	00:20:32	00:00:12	00:00:35	00:00:49	00:06:42	00:18:52	01:13:42	00:14:25	01:53:17	02:30:04	00:00:30	00:00:30	00:02:00