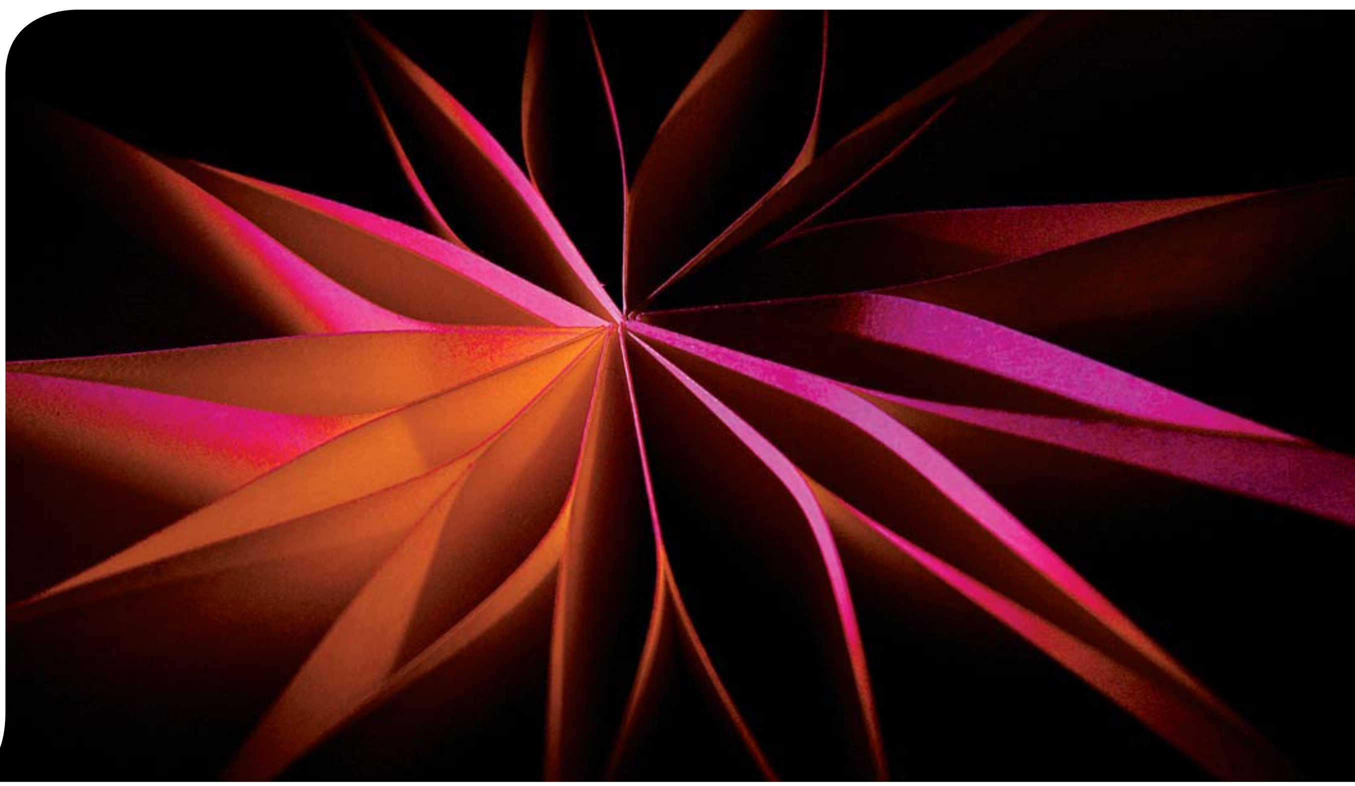
ShoreTel
University

ShoreTel Contact Center
Using ShoreWare Agent Toolbar



USER GUIDES

RELEASE 6

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Preface

Objectives

This guide provides information on customizing and using ShoreWare Agent Toolbar for the ShoreTel Contact Center (CC) and Enterprise Contact Center (ECC) editions. This guide is intended for Contact Center supervisors and agents.

The online Help provides content-sensitive information about ShoreWare Agent Toolbar.

Documentation Overview

The following documents offer additional information about the Contact Center system:

- Release Notes
- Installing Guide
- Contact Center Administrator Guide
- Applications Interface Guide
- Installing and Implementing Enterprise Contact Center Chat
- Supervisor Guide
- Report Data Fields Reference Guide
- Context-Sensitive Online Help

Contact Center documentation can be found in the Documentation folder of the ShoreTel Contact Center Solution Installation CD and on the ShoreTel web site. The context-sensitive online help can be accessed from the Help menu of each Contact Center application.

Document Conventions

The following conventions are used in this guide:

- Data-entry fields, hypertext links, control buttons, keywords, and other items in the interface are in a **boldface** font.
- Information that you enter in data fields is in a `data_entry` font.

CHAPTER 1

Overview

ShoreWare Agent Toolbar is a powerful, easy-to-use software application that provides access to telephony and ACD capabilities. Telephony capabilities include features such as answer, call, hold, transfer, and conference. ACD capabilities include features for going into release, resume, and wrap-up modes, and viewing calls in a queue.

ShoreWare Agent Toolbar works with the ShoreTel Contact Center (CC) and Enterprise Contact Center (ECC) editions to enable you to maximize performance in the Call Center environment. It provides a library of services enabling integration with your company's existing services and database using the Windows DDE/ActiveX interface. Information can be shared between systems during ACD call handling.

ShoreWare Agent Toolbar has the following features:

- Customizable Toolbar - Buttons can be programmed, enabling quick access to ShoreWare Agent Toolbar features and frequently performed telephony operations.
- Telephone Manager - Allows you to perform call handling from your desktop by assigning keypad buttons to specific telephony functions.
- Queue Monitor - Provides a view of the status of all calls in a queue. The call list updates dynamically to show the current queue situation. If a call requires immediate attention, you can pick up a call directly from the queue.
- Call Status - Displays the status of your connected calls.
- Agent Log - Available for all calls ringing or answered by an agent.
- Desktop Wallboard - Provides real-time statistical information about your group.
- Chat - Provides a chat browser for handling chat contacts.

Starting ShoreWare Agent Toolbar

There are two methods for starting ShoreWare Agent Toolbar depending on your environment. If you are using the Hotdesk or Citrix environment, you may want ShoreWare Agent Toolbar to dynamically associate with any available number. This is done through a different logon process, for details see Logging on in the Hotdesk or Citrix Environments section on page 10.

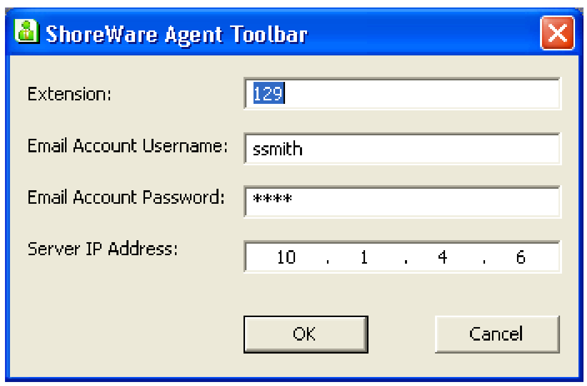
Note: You can only log onto ShoreWare Agent from your PC. Attempting to log on using your telephone results in the application shutting down.

Standard Logon

Step 1 From the Windows desktop, click **Start** > **Programs** > **ShoreTel** > **ShoreWare Contact Center Agent** > **ShoreWare Agent Toolbar**.

If the ShoreWare Agent Toolbar icon is on your desktop, or in the Windows Start menu, you can click this icon to start ShoreWare Agent Toolbar.

Step 2 If this is the first time you have logged on to ShoreWare Agent Toolbar, the resulting dialog box appears. Use this dialog box to specify your information, and then click **OK**.

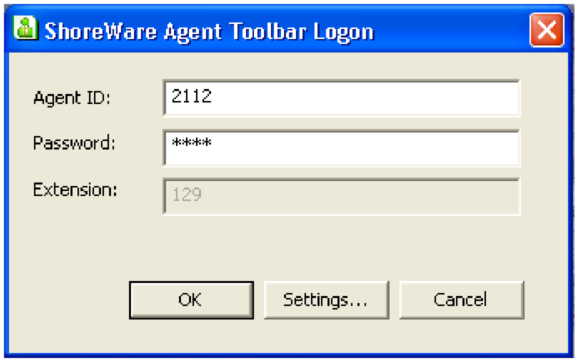


The fields are

- Extension - Displays the current telephone extension assigned to you. Voice call are routed to this extension.
- Email Account Username - The email address used if you are part of a group that receives email.
- Email Account Password - The email password used if you are part of a group that receives email.
- Server IP Address - The IP address of the Contact Center server.

The ShoreWare Agent Toolbar Logon dialog box appears.

Step 3 In the ShoreWare Agent Toolbar Logon dialog box, enter the following information:

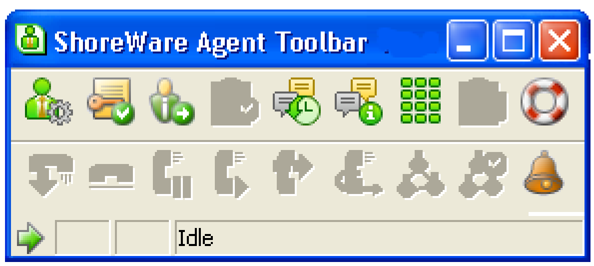


- Agent ID
- Password
- Extension - Your extension may already be entered here by default.

If you need to change the extension, or other agent information, click **Settings** and specify the appropriate information as explained in step 2, above.

Step 4 Click **OK**.

Once connected to the server, ShoreWare Agent Toolbar opens.



The features available from ShoreWare Agent Toolbar have been determined by your administrator. Depending on the permissions granted by your administrator, you can customize ShoreWare Agent Toolbar with the features and functionality you need to do your job. See Chapter 3 for details.

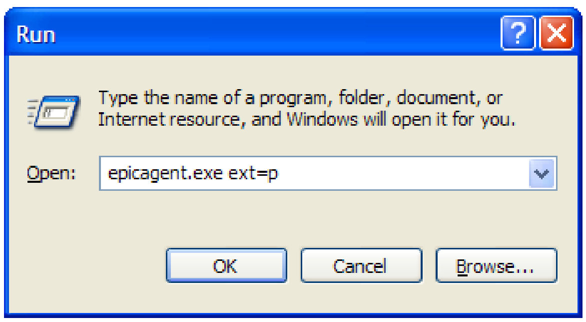
Logging on in the Hotdesk or Citrix Environments

If you are working in the Hotdesk or Citrix environment, you may want to dynamically associate ShoreWare Agent Toolbar with any available phone in your contact center. This allows you to handle and manage calls with ShoreWare Agent Toolbar, in conjunction with the ShoreTel AnyPhone feature, just as if you were assigned the extension being used.

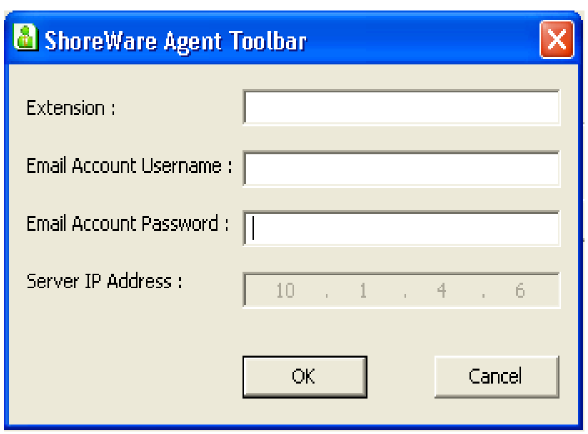
Step 1 In the Windows Taskbar, click **Start** > **Run**.

The **Run** dialog box opens.

Step 2 In the Open field, type the Contact Center command, `epicagent.exe ext=p` and then click **OK**.



Step 3 In the resulting dialog box, specify your information, and then click **OK**.



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- Extension - Displays the current telephone extension assigned to you. Voice call are routed to this extension.
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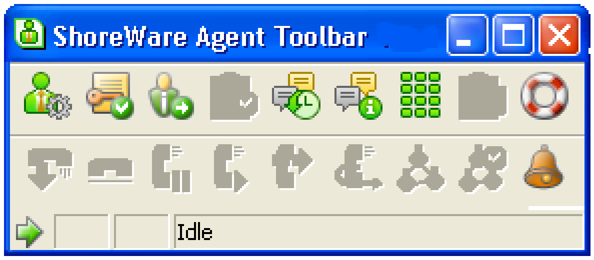


The features available on ShoreWare Agent Toolbar have been determined by your administrator. You can customize ShoreWare Agent Toolbar with the features and functionality you need to do your job. See Chapter 3 for details.

About Chat in Enterprise Contact Center

Chat sessions are initiated through requests coming from a chat Web browser. The customer clicks a Chat button on their Enterprise Contact Center page to open a chat window while waiting for an agent to respond. A chat browser window opens at your end, allowing you to start the chat session.

Contact Center supports the following chat services:

- Chat conversation - You can be engaged in a chat conversation at any time.
- Web callback - Customers can leave telephony callback information. The system uses this information to initiate a telephone call with an available agent. You are put on reserve to receive an outbound call and automatically connected once the customer is contacted to receive the call.

Displays on the Status bar as chat. Agent click Answer and browser opens. Disconnect to close connect (or close browser).

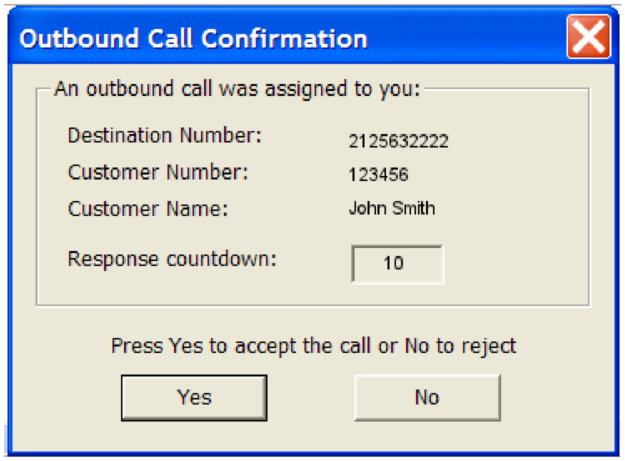
About Callback

Callback is an option for returning calls automatically when customers supply a callback number or calls are abandoned by customers. The Callback feature offers customers an alternative to waiting in queue when agents are busy. There are multiple types of callbacks:

- Abandoned - The caller have hangs up after some time.
- Scheduled - The caller schedules a number and time to be called back.

If your Contact Center implementation includes Callback, you are placed on reserve for outbound calls. If outbound calls are set to "agent confirmation required," when an outbound call is made, the Outbound Callback Confirmation dialog box opens. The dialog box displays call details to help you decide whether to accept or reject the call. This includes:

- **Destination Number** - The number the system will dial.
- **Customer Number** - The customer's phone number.
- **Customer Name** - The customer's name.
- **Response countdown -** The remaining time (in seconds) for you to respond to the callback request.



If you reject the call, or if you do not respond to accept the call, you are automatically placed in a Release mode.

C H A P T E R 2

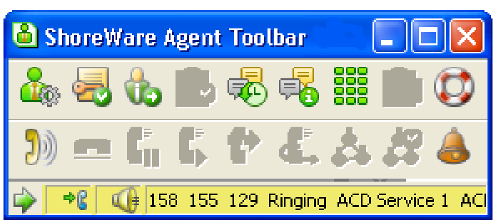
Using Agent Toolbar

ShoreWare Agent Toolbar provides quick access to frequently used operations throught it's toolbar. It enables you to perform Telephony and ACD operations from you desktop with the click of a single button. And you can handle a combination of calls such as calls on hold, ringing calls, a connected call and an ACD call.

ShoreWare Agent Toolbar also includes special features, like a log of your calls.

Status Bar

The Status bar provides a Toggle button, and displays information on your current activity and on the state of your extension.



Your Status bar may look different than that displayed above. The information displayed on the Status bar has been determined by your administrator.

To use the Status bar:

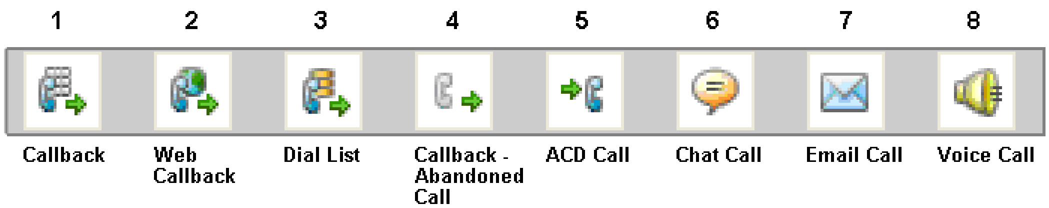
Step 1 You can move between active calls by clicking the **Toggle** button ().

The Status bar changes to reflect information on the call you are currently on.

Step 2 Determine the state of you extension by the Status bar color. These colors and their meanings are

- **Yellow** - A call is ringing.
- **Green** - You are connect to the call.
- **Light Blue** - You are on reserve for outbound calls.
- **Magenta** - The call is on hold.
- **Blue** - The action has been initiated.
- **Red** - The action has failed.

Step 3 Identify the type of call you are currently on by the icon(s) displayed in the Status bar. These icons indicate that the current call is a



- **Callback (1):** Callback call, scheduled by the customer.
- **Web Callback (2):** Web callback call. A web callback is a callback call requested from the Web.

  This feature is only available in Enterprise Contact Center.
- **Dial List (3):** Dial list or campaign call.

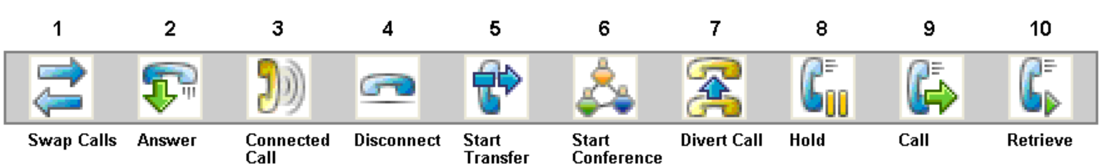
  This feature is only available in Enterprise Contact Center.
- **Callback-Abandoned Call (4):** Callback call to an abandoned caller.
- **ACD (5):** Incoming ACD call.
- **Chat (6):** Chat.

  This feature is only available in Enterprise Contact Center.
- **Email (7):** Email.

  This feature is only available in Enterprise Contact Center.
- **Voice (8):** Voice call.

Telephony Features

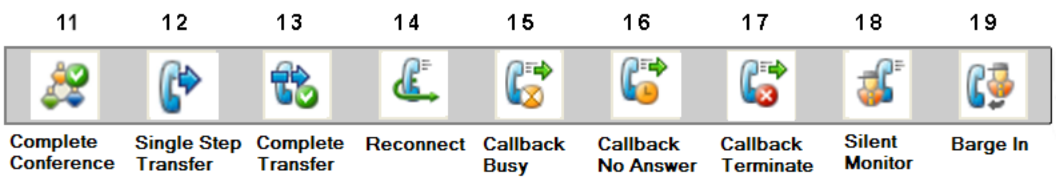
Agent Toolbar telephony features enable you to handle calls with a single click. These include:



- **Swap Calls (1):** Swaps the call on hold with the connected call.
- **Answer (2) / Connected Call (3):** Answers incoming call. The button blinks when a call rings at your position. When you answer the incoming call (or open the button) changes to (3) to indicate that the call is connected.

  If the incoming call is an email, your email application must be opened for the system to download the email from the Contact Center server when you click the Answer button.

- **Disconnect** (4): Disconnects the current call.
- **Start Transfer** (5): Starts the transfer procedure for the current call.
- **Start Conference** (6): Starts the conference procedure.
- **Divert Call** (7): Diverts the incoming call to another number.
- **Hold** (8): Places the call on hold.
- **Call** (9): Calls the selected telephone number.
- **Retrieve** (10): Retrieves the call on hold.



- **Complete Conference** (11): Completes the conference procedure.
- **Single Step Transfer** (12): Performs a single step transfer.
- **Complete Transfer** (13): Completes the transfer procedure.
- **Reconnect** (14): Disconnects the current call and reconnects to the call placed on hold.
- **Set Callback – Reinsert Busy** (15): Reinserts a callback call in the queue. This feature is only available when an actual call is connected; if the callback extension is invalid you will not be able to use Callback.

  You may not need this feature if your system automatically identifies a busy destination and does not transfer these callback calls to an agent.
- **Set Callback – Reinsert No Answer** (16): Reinserts an unanswered callback call in the queue. This enables the system to again dial the outbound call. This feature is only available when an actual call is connected; if the callback extension is invalid you will not be able to use Callback.

  You may not need this feature if your system automatically identifies a destination that does not answer and does not transfer these callback calls to an agent.
- **Set Callback – Reinsert Terminate** (17): Removes the callback call from the system. This feature is only available when an actual call is connected; if the callback extension is invalid you will not be able to use Callback.
- **Silent Monitor** (18): Allows you to monitor agent conversations.

  Note: ShoreWare Agent Toolbar does not support “silent coaching”. Implementing such a feature can result in unexpected information in the Status bar.
- **Barge In** (19): Enables you to barge in on agent conversations.

Working with Telephony Features

Agent Toolbar's telephony features allow you to make, answer, transfer, and divert calls from within the application. You can also initiate a conference call.

In order to increase your efficiency and productivity, the appropriate telephony button should be displayed on the Toolbar. The section Selecting Toolbar Features on page 39 has information on adding and removing buttons.

Making Calls

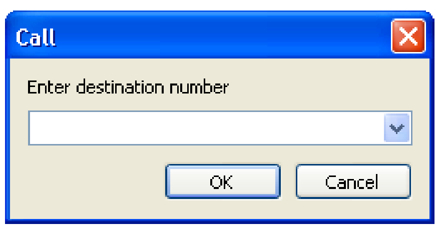
You use the Call button on the Toolbar to make a call.

To make a call:

Step 1 From the Toolbar, click **Call**.

If the Call button is programmed with the number to call, the system automatically dials the number.

Step 2 If the button is not programmed with the number to call, the Call dialog box appears. Use the Call dialog box to enter the number to dial; recently dialed numbers can be selected from the drop-down list. Then click **OK**.



The system dials the specified number.

For information on changing the programmed number, or to instead be prompted for a number each time you click the Call button, see Programming Buttons on page 40.

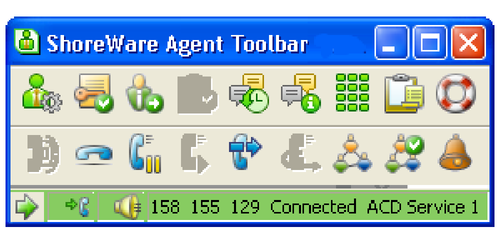
Answering Incoming Calls

When a call comes in, the system routes the call to the an agent. If you have an incoming call, the Status bar turns yellow, indicating that your extension is ringing.

To answer an incoming call:

Step 1 From the Toolbar, click **Answer**.

The Status bar indicates that you are now connected, and the Answer button changes to Connected.



The current active call is displayed on the Status bar. The Connected button reverts back to the Answer button after you complete the call. Use the **Toggle** button to move between calls.

In your call center, you may be required to provide a wrap-up code before answering the next incoming call. In this case, Agent Toolbar displays the Enter Wrap-Up Code icon on the Status bar. Click the icon to enter the wrap-up code as explained in the section Specifying a Wrap-Up Code on page 23.

Transferring Calls

Transferring puts the current call on hold while the system dials a specified destination number. This allows you to determine the availability of a transfer destination, and introduce the caller to the transfer destination. You can also cancel a transfer call, and connect a caller directly to the destination number in a single step.

You can transfer calls to agents in another group. However, since these calls are treated as non-ACD, Agent Toolbar's wrap-up features are not available on these type of calls.

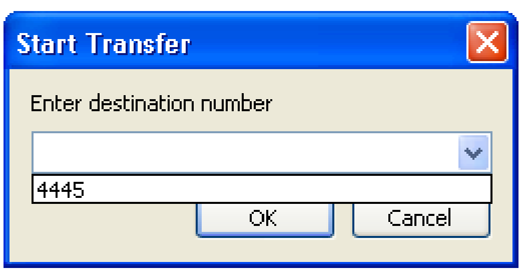
If you are working in ACD mode, use the Transfer to Agent button to transfer the call to an agent within your group. See Using ACD Features on page 21 for details.

To transfer a call:

Step 1 From the Toolbar, click **Start Transfer**.

If the Start Transfer button is programmed with the number to call, the system automatically dials the number and puts the active call on hold.

Step 2 If the button is not programmed with the number to call, the Start Transfer dialog box appears. Use the dialog box to specify the number for the transfer destination; recently dialed numbers can be selected from the drop-down list. Then click **OK**.



The system dials the number and places the active call on hold.

Step 3 Click **Complete Transfer**.

To cancel a transfer call:

Step 1 Before the transfer is completed, click **Reconnect**.

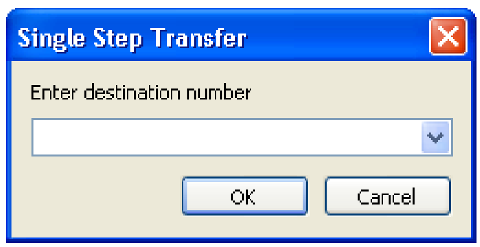
The system returns you to the original caller.

To connect a caller directly to the destination number in a single step:

Step 1 From the Toolbar, click **Single Step Transfer**.

If the Single Step Transfer button is programmed with the number to call, the system automatically connects the active call to the destination.

Step 2 If the button is not programmed with the number to call, the Single Step Transfer dialog box appears. Use the dialog box to specify the number for the transfer destination; recently dialed numbers can be selected from the drop-down list. Then click **OK**.



The system dials the number and disconnects you from the call.

For information on changing the programmed number, or to instead be prompted for a number each time you click the Single Setup Transfer button, see Programming Buttons on page 40.

Conferencing

The Conference feature allows two additional people to converse simultaneously in a call. When engaged in a conference call, you cannot make another call using Agent Toolbar; however, you can do so using your telephone.

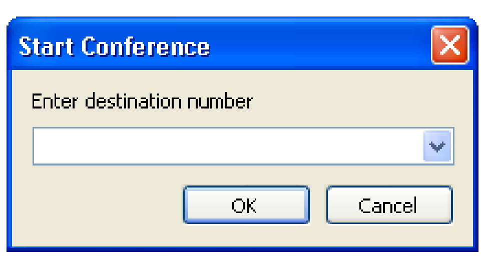
You can also cancel a conference call.

To initiate a conference call:

Step 1 From the Toolbar, click **Start Conference**.

If the Start Conference button is programmed with a specific number, the system puts the current active call on hold and dials the number for the conference.

Step 2 If the button is not programmed with a number, the Start Conference dialog box appears. Use the dialog box to specify the number for the conference call; recently dialed numbers can be selected from the drop-down list. Then click **OK**.



Step 3 Click **Complete Conference**.

For information on changing the programmed number, or to instead be prompted for a number each time you click the Conference button, see Programming Buttons on page 40.

To cancel a conference call:

Step 1 Before the conference call is completed, click **Reconnect**.

The system returns you to the original caller.

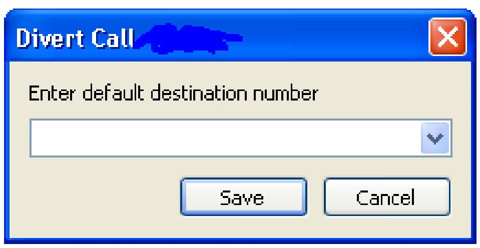
Diverting Calls

Agent Toolbar makes it possible to divert an incoming call to another number while the call is ringing.

To divert a call:

Step 1 From the Toolbar, click **Divert Call**.

The Divert Call dialog box appears.



Step 2 In the Divert Call dialog box, enter the destination number, or select the number from the drop-down list of recently called numbers.

Step 3 Click **OK**. The system diverts the call to the specified number.

ACD Features

Agent Toolbar ACD features allows you to manage calls with in ACD mode. These include:

- **Login Primary ACD Groups (1) / Logout Primary ACD Groups (2):** Allows you to log into or logout from all of your primary groups with a single click.

  The button changes to indicate your current state:

  — A green check mark shows that you are logged on to your primary groups.

  — A red mark means you are logged out from your primary groups.

  Note that you can not add or remove these buttons. If Agent Toolbar displays these buttons, they have been included by your administrator. Your primary groups are also defined and allocated by the administrator during installation.

- **Login to ACD Group (3) / Logout from Group (4):** Enables you to toggle between login to or logout from a specific group to which you belong.

  The button changes to indicate your current state:

  — A green check mark shows that you are logged on to your group.

  — A red mark means you are logged out from your group.

- **Groups Manager (5):** Makes it possible for you logon/logout of specific groups.

- **Release (6) / Resume (7):** Enables you to toggle between setting your station to a Release state and the normal ACD mode. This feature is useful when taking a break from your contact center activities.

  The Release state blocks ACD calls without having to log out. You can also receive internal or private calls. When in release mode, the button turns red; in resume mode the button is green.

  Note that you can not add or remove this button. If Agent Toolbar displays this button, it has been included by your administrator during installation.

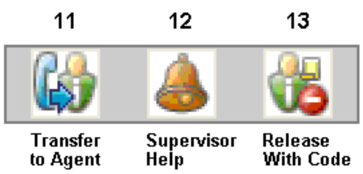
- **Wrap-Up Code (8):** Associates wrap-up code with a call. In a wrap-up state, ACD calls are not routed to you.

  The time associated with a wrap-up state is typically used by agents to finish paperwork or tie-up loose ends regarding the previous call.

- **Wrap-Up Manual Control (9):** Controls the wrap-up state. Extends the wrap-up time if the automatic wrap-up time is not sufficient. The ready button will flash during controlled wrap-up reminding you to press the button to enable you to receive incoming calls.

- **Manual Wrap-Up Ready (10):** Manually ends the wrap-up/Controlled wrap-up state making you ready and available for ACD calls.

Note that you can not add or remove this button. If Agent Toolbar displays this button, it has been included by your administrator during installation.



- **Transfer to Agent (11):** Transfers a call to another available agent in your group.

  The system treats a transfer to another agent, in the same ACD group, as an ACD transfer and reports it as an ACD call.
- **Supervisor Help (12):** Notifies a supervisor if you require help.
- **Release with Code (13):** Allows you to choose a release code, indicating the reason for going into the Release state.

Using ACD Features

Agent Toolbar's ACD features make it possible for you to login to and log out from a group, manage your groups, and use wrap-up code.

In order to increase your efficiency and productivity, the appropriate ACD buttons should be displayed on the Toolbar. See Chapter 3 for information on adding and removing buttons.

Some ACD buttons can be programmed for specific purposes. See Selecting Toolbar Features on page 39 for details.

Logging Into and Out of ACD Groups

Agent Toolbar provides two toggle buttons that allow you to log into or out from ACD groups. These features are only available if your administration has given you the COS permission "Initiate Specific Login/Logout."

To log into or out of all your ACD groups:

Step 1 From the Toolbar, click **Login/Logout Primary ACD Group**.

You are automatically logged into or out from all your ACD groups.

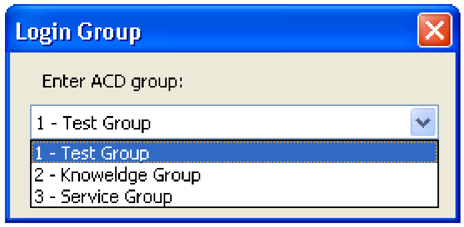
The login state persists even when you exit Agent Toolbar, meaning that you do not have to log in or out of your ACD groups each time you start up.

To log into or out of a specific ACD group:

Step 1 From the Toolbar, click **Login/Logout ACD Group**.

If the Login ACD Group button is programmed with a specific group, the system automatically logs you into that group.

Step 2 If the Login ACD Group button is not programmed with a specific group, the Login Group dialog box appears. Use the dialog box to select the group from the drop-down list. Then click **OK**.



For information on changing the programmed group, or to instead be prompted for a group each time you click the Login ACD Group button, see Programming Buttons on page 40.

Managing Your Groups

The Groups Manager enables you to manage your groups by specifying the login or logout state of each group. Assigning a state to a group makes it possible to logout from one group and automatically login to another group with a single click (using the Logout from Group button).

This feature is only available if your administration has given you the appropriate COS permission.

To use the Groups Manager:

Step 1 From the Toolbar, click **Groups Manager**. The Group Manager dialog box appears.

The Logged Groups pane on the left shows your groups that are in the login state. The Available Groups pane on the right displays the list your groups that you can log into.

Step 2 To put a group into the login state, select the group(s) from the Available Groups pane and click **Login**. The group is moved to the Logged Groups pane.

Step 3 To put a group into the logout state, select the group(s) from the Logged Groups pane and click **Logout**.

The group is moved to the Available Groups pane.

Step 4 When you are satisfied with the status of your groups, click **Close**.

Specifying a Wrap-Up Code

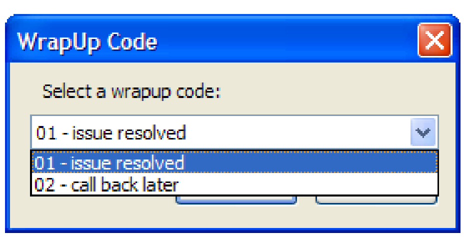
Wrap-up code is a description of the outcome of a call in wrap-up state. By specifying a code for typically used outcomes, you can easily assign the appropriate outcome when working in the wrap-up state.

To specify a wrap-up code:

Step 1 From the Toolbar, click **Wrap-Up Code**.

If the Wrap-Up Code button is programmed with a specific code, the code is assigned to the call.

Step 2 If the Wrap-Up Code button is not programmed with a specific code, the Wrap-Up Code dialog box appears. Use the dialog box to select the code from the drop-down list. Then click **OK**.



For information on changing the programmed code, or to instead be prompted for a code each time you click the Wrap-Up Code button, see Programming Buttons on page 40.

Specifying a Release Code

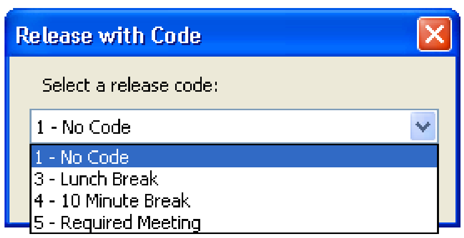
Release code is a description of the outcome of a call in release state. By specifying a code for typically used outcomes, you can easily assign the appropriate outcome when working in the release state.

To specify a release code:

Step 1 From the Toolbar, click **Release with Code**.

If the Release with Code button is programmed with a specific code, the code is assigned to the call.

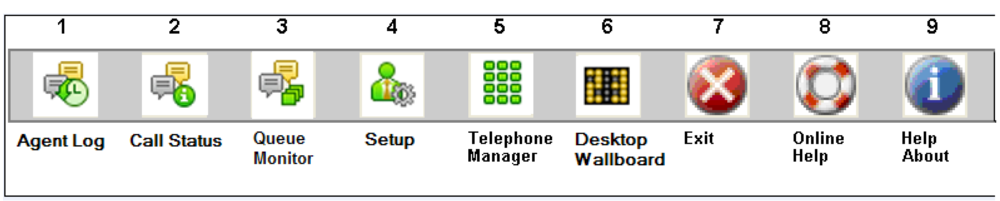
Step 2 If the Release with Code button is not programmed with a specific code, the Release with Code dialog box appears. Use the dialog box to select the code from the drop-down list. Then click **OK**.



For information on changing the programmed code, or to instead be prompted for a code each time you click the Release with Code button, see Programming Buttons on page 40.

Window Features

Window features focus on the Toolbar and other windows in Agent Toolbar. These include:



- **Agent Log** (1): Lists the calls handled by you in the current logon session.
- **Call Status** (2): Displays the status of your connected calls.
- **Queue Monitor** (3): Shows the current calls in the queue.
- **Setup** (4): Customizes the Toolbar.
- **Telephone Manager** (5): Enables access to telephone operations from your desktop.
- **Desktop Wallboard** (6): Opens the Desktop Wallboard, which displays real-time information from your supervisor or administrator.

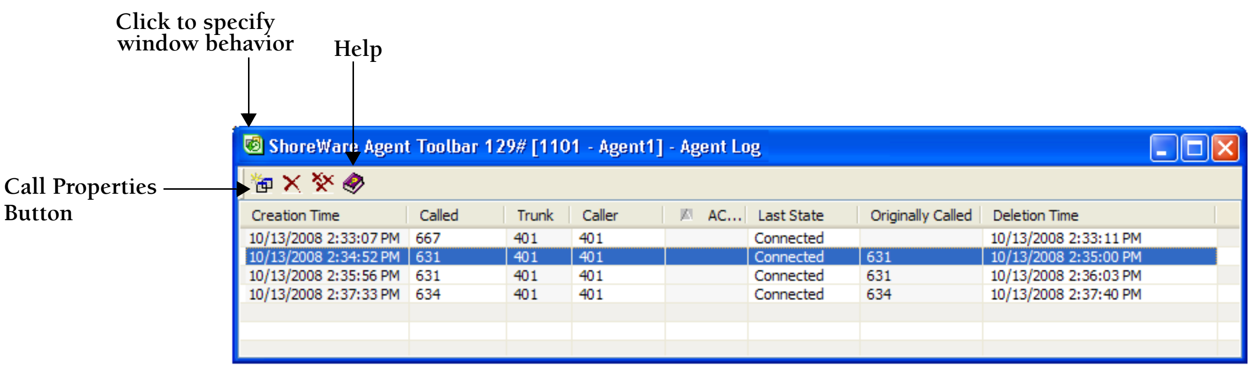
  Desktop Wallboard may not be available, as it is an optional feature.

- **Exit** (7): Closes Agent Toolbar.
- **Online Help** (8): Opens online Help.
- **Help About** (9): Displays information about the Agent Toolbar application.

Working with Windows Features

Agent Toolbar's Window features enable you to customize and exit the Toolbar, view and work from various informational windows, and display Help information.

The informational windows provide specific features when working in a window. These include:



- **Window Behavior**. Click the window button in the top-left corner, and select the appropriate option from the menu. The option **Always on Top** may be particularly useful.
- **Help**. Click the Help icon to get context-sensitive help on the window.
- **Call Properties**. If the window contains a list of calls, selecting a call and clicking Call Properties provides additional information on the call.

In order to increase your efficiency and productivity, the appropriate Window buttons should be displayed on the Toolbar. See Chapter 3 for information on adding and removing buttons.

Setting Up Agent Toolbar

The Setup button provides access to tabs to customize Agent Toolbar, specifying preferences, define your extension and email address, select a ring tone. and create alerts.

This feature is only available if your administration has given you the COS permission "Setup."

To setup Agent Toolbar:

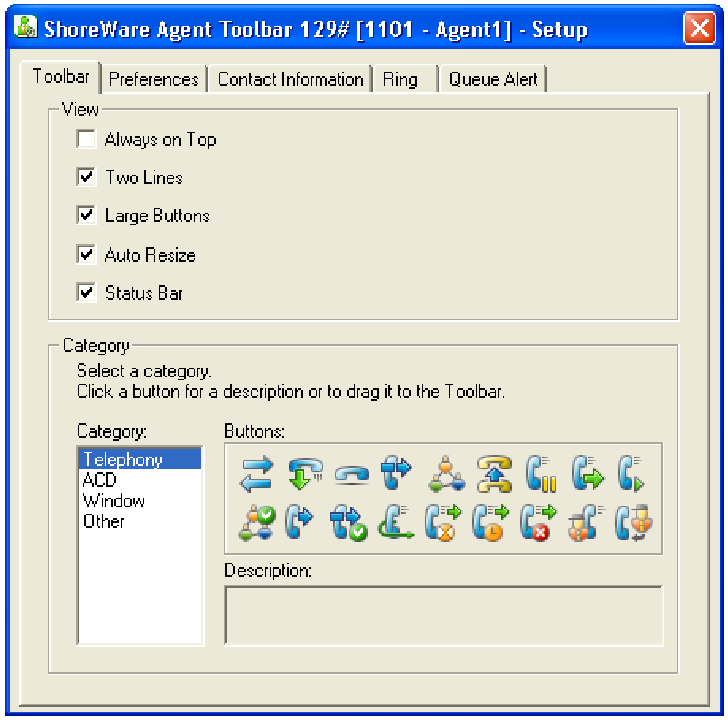
Step 1 From the Toolbar, click **Setup**.

The Setup dialog box appears., with the Toolbar tab displayed by default.

Step 2 Click on appropriate tab. These tabs are:

- Toolbar: Provides options for the display and contents of the Toolbar.
- Preferences: Includes options for personalizing the Toolbar.

- Contact Information: Identifies your extension number, email address, and server address.



- Ring: Includes options for ring alerts and tones for incoming contacts by voice, email, or chat.
- Queue Alert: Displays options for alerts.

See Chapter 3 for information on using these tab options.

Using the Call Status Window

The Call Status window shows the status of all your currently connected calls. Since details on only the current call are displayed in the Status bar, the Call Status window is useful for viewing information on other calls. In addition, you can use the Call Status window to simultaneously handle a combination of calls and to define how data on a call is displayed on the Status Bar.

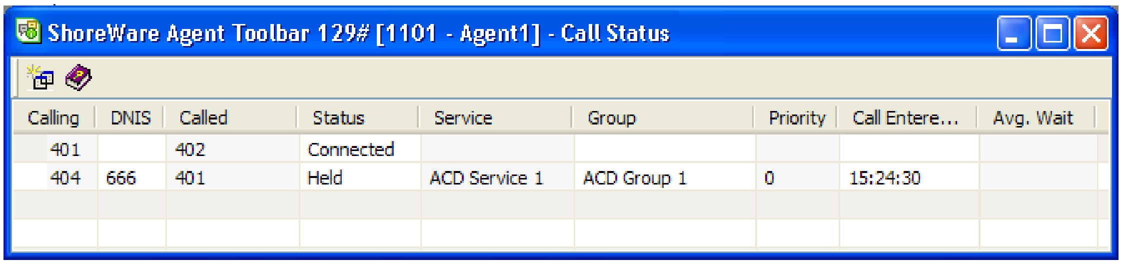
Information is displayed in columns. Details on each column can be found in the online Help topic Available Columns in Agent Toolbar Windows.

This feature is only available if your administration has given you the COS permission "Call Status."

To use the Call Status window:

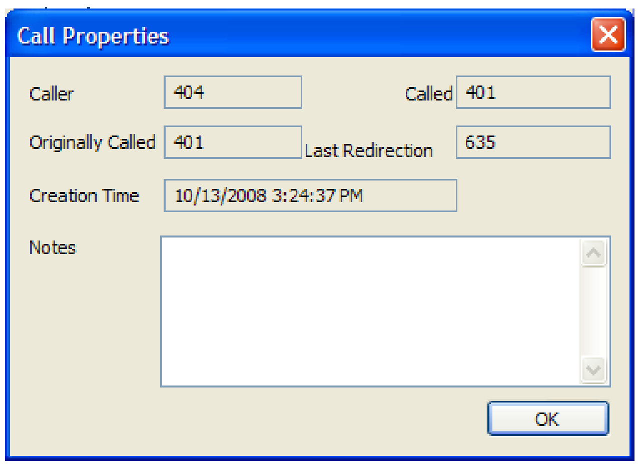
Step 1 From the Toolbar, click **Call Status**.

The Call Status window opens.



Step 2 To view a call ‘s properties, select the call from the list and click **Call Properties**.

Step 3 The Call Properties dialog box opens. Use the Notes field to add a note about the call. Click **OK** to close the dialog box.



Information in the Notes field is saved to the Call Log, available from the Agent Manager application.

Step 4 To change the sort order of the calls in the list, click the column header to display the calls in ascending or descending order.

Step 5 To add to or delete columns from this window, see Defining Columns on page 44.

Step 6 To work with a call, right-click on the call in the list, and select the appropriate command from the pop-up menu. These commands are Add, Drop, Hold, and Retrieve.

Using the Queue Monitor Window

The Queue Monitor window provides information about calls that are currently in queues. You can answer a call in a queue directly from this window. Information is displayed in columns. Details on each column can be found in the online Help topic Available Columns in Agent Toolbar Windows.

Note that information on the queued calls is only available if your administrator has configured the system to broadcast queue information, and you have the COS permission “Queue Monitor.”

To use the Queue Monitor window:

Step 1 From the Toolbar, click **Queue Monitor**.

The Queue Monitor window appears, showing in the lower part of the window all calls in queue.

Step 2 To filter the calls displayed, select a group from the top part of the window. The Queue Monitor shows only the calls in queue for that group.

Step 3 To answer a call in the queue, double-click on the call in the list.

You can only answer a call if you are not connected to another call. If another agent has already answered the call, it will not be routed to you.

Step 4 To change the sort order of the calls in the list, click the column header to display the calls in ascending or descending order.

Step 5 To add to or delete columns from this window, see Defining Columns on page 44.

Using the Agent Log Window

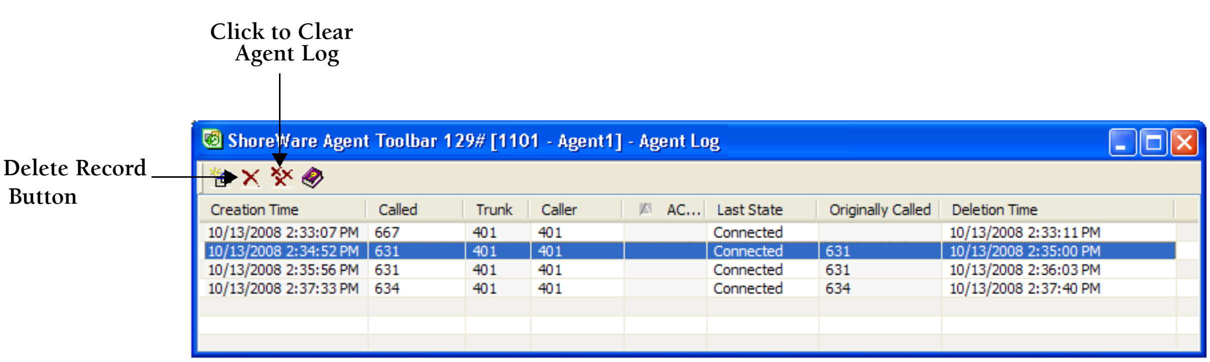
The Agent Log window displays log data about each of your calls. Information is displayed in columns. Details on each column can be found in the online Help topic Available Columns in Agent Toolbar Windows.

This feature is only available if your administration has given you the COS permission “Agent Log.”

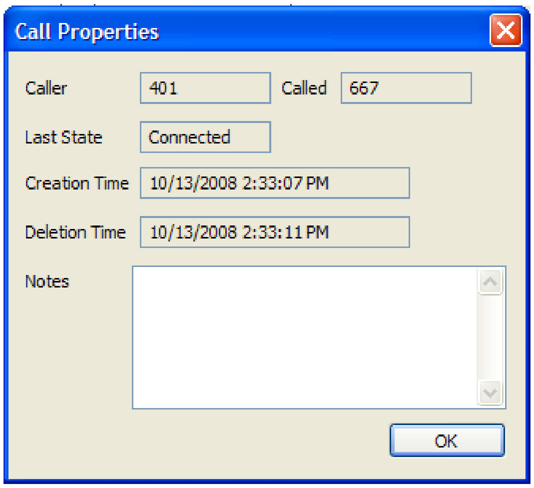
To use the Agent Log window:

Step 1 From the Toolbar, click Agent Log.

The Agent Log window appears.



Step 2 To view the log properties for a call, select the call from the list and click **Properties**. You can also add a note about the call. Click **OK** to close the dialog box.



Note that any information in the Notes field is not saved when Agent Toolbar is closed.

Step 3 To delete a call from the log, select the call and click **Delete Record**.

Step 4 To clear information about all the calls in the log, click **Clear**.

Step 5 To change the sort order of the calls in the list, click the column header to display the calls in ascending or descending order.

Step 6 To add to or delete columns from this window, see Defining Columns on page 44.

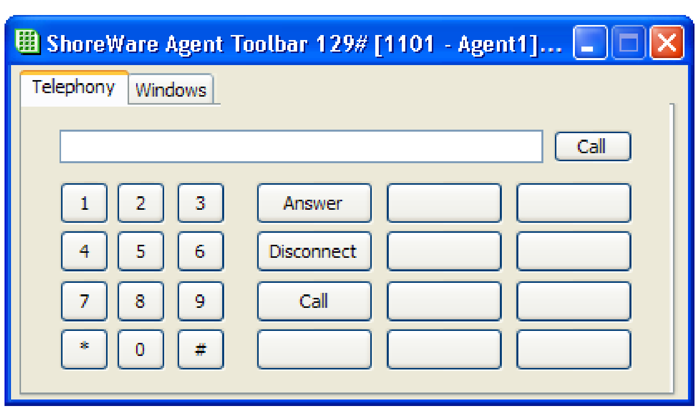
Using the Telephone Manager

The Telephone Manager functions like a telephone keypad, allowing you to perform call handling operations from your desktop.

This feature is only available if your administration has given you the COS permission “Telephone Manager.”

To use the Telephone Manager:

Step 1 From the Toolbar, click **Telephone Manager**. The Telephone Manager dialog box appears., with the Telephony tab displayed by default.



Step 2 Click on appropriate tab. These tabs are:

- Telephony: Displays the dial pad and nine buttons that can be customized with specific functions. The Telephony tab can be renamed but it cannot be deleted.
- Windows: Contains 20 buttons that can be assigned with specific functions.

Step 3 To make a call, from the Telephony tab, click the dial pad buttons for the number and click **Call**.

Step 4 To execute a function, click on the appropriate button.

Step 5 Close Telephone Manager by clicking on the window's **Close** button.

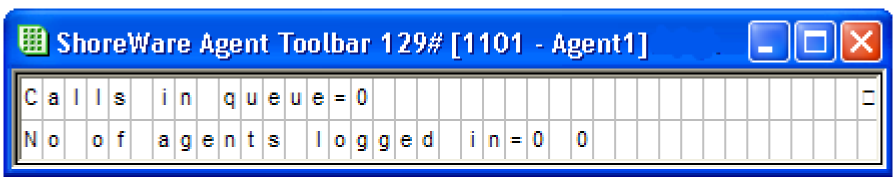
Additional tabs can be added to the Telephone Manager, and buttons can be programmed with specific functions. See Personalizing Telephone Manager on page 42 for details.

Viewing Messages in the Desktop Wallboard.

Desktop Wallboard is used by supervisors to send you information instantly or as needed. You must be in a Logon state to use Desktop Wallboard.

To view messages in the Desktop Wallboard:

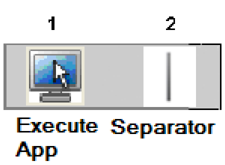
Step 1 From the Toolbar, click **Desktop Wallboard**. The Desktop Wallboard opens with a message displayed.



Step 2 Close the Desktop Wallboard by clicking on the window's **Close** button.

Other Operations

Other operations are features that do not fit into the other three categories. These include:



- **Execute App** (1): Launches an external application in Contact Center.
- **Separator** (2): Creates a visual separation between buttons on the Toolbar.

Using the Other Features

Agent Toolbar's Other features allow you to setup and run external applications from within Contact Center and to create a visual separation between buttons on the Toolbar

In order to increase your efficiency and productivity, the appropriate Other buttons should be displayed on the Toolbar. See Selecting Toolbar Features on page 39 for information on adding and removing buttons.

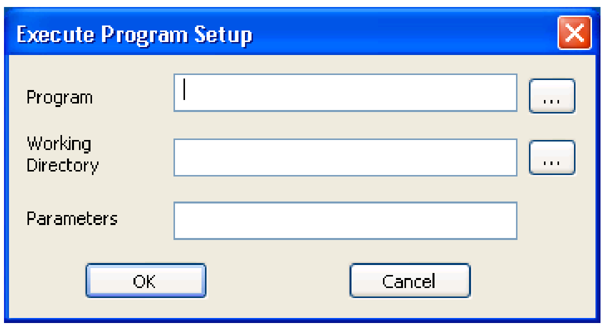
Running an External Application

Information on an external application is not saved in the system when Agent Toolbar closes. The following procedure must be repeated each time you want to run an external application from within Control Center.

To run an external application:

Step 1 From the Toolbar, click Run.

The Execute Program Setup dialog box appears.



Step 2 In the Program field, click the ellipsis (...).

The Select File dialog box opens.

Step 3 Locate and select the application you want to run.

The directory path for the application is entered in the Program field.

Step 4 If required by the selected application, in the Working Directory field, specify the working directory. You can click the ellipsis (...) to locate and select the directory.

Step 5 If required by the selected application, in the Parameters field enter the command line parameters to use in running the application.

Step 6 Click **OK**.

The application executes.

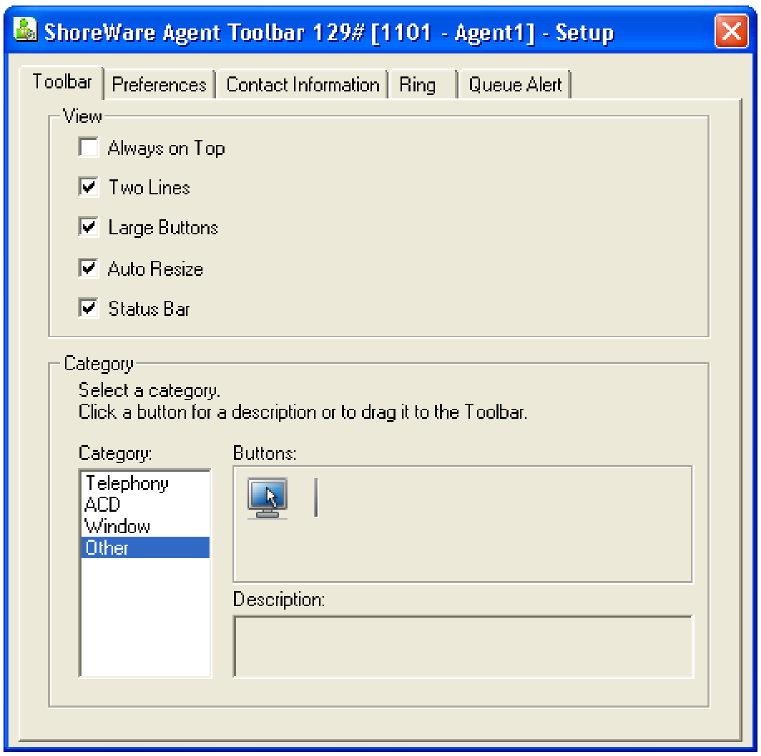
Separating Buttons on the Toolbar

The Separator button creates a visual separation between buttons on the Toolbar, which you can use to put space between buttons or to group buttons of similar functionality.

To separate buttons on the Toolbar:

Step 1 From the Toolbar, click **Setup**.

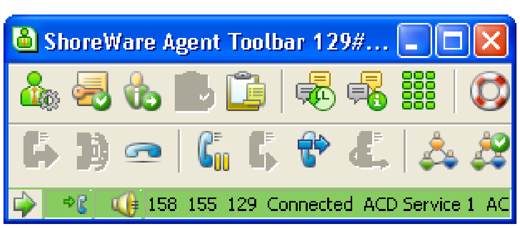
The Setup dialog box opens, with the Toolbar tab selected by default.



Step 2 In the Category area, select Other.

The buttons in the category are shown in the Buttons area.

Step 3 Click the Separator button, and drag-and-drop it to the desired position on the Toolbar.



The separations are displayed on the Toolbar.

CHAPTER 3

Customizing Agent Toolbar

ShoreWare Agent Toolbar can be personalized and customized for the way you work. This includes determining the look and feel of the Toolbar, selecting the features you want on the Toolbar for easy access, and programming buttons to enable single-click functionality.

Specifying Toolbar Display and Behavior

You can specify how Agent Toolbar looks on your desktop, how Agent Toolbar behaves, your contact information, and the type of rings and alerts you want.

Selecting View Options

By default, certain view options are selected during installation. You can change how the Toolbar is displayed on your desktop by using the View options.

This feature is only available if your administration has given you the COS permission "Change Toolbar Layout."

To select a View option:

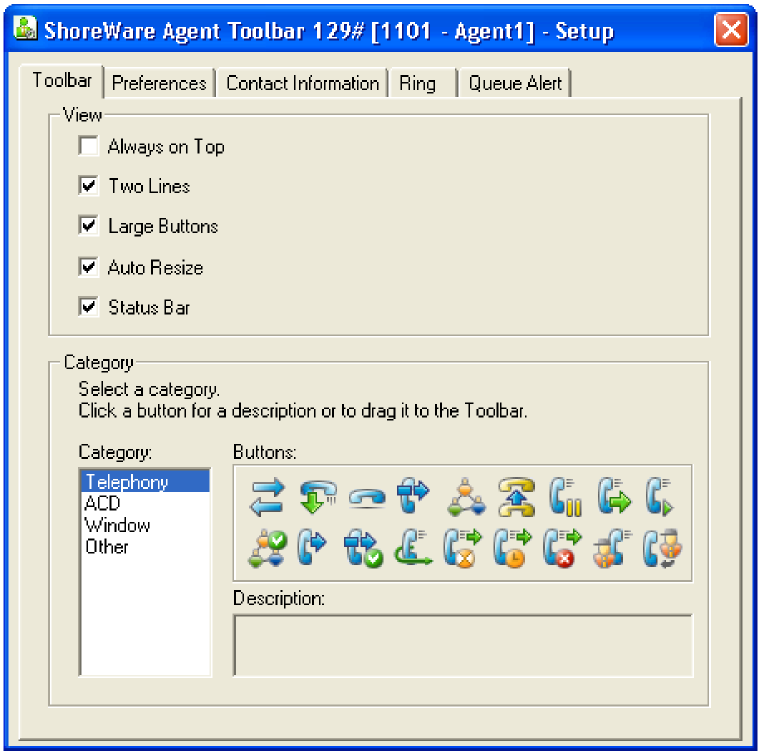
Step 1 From the Toolbar, click **Setup**. The Setup dialog box opens, with the Toolbar tab selected by default.

Step 2 In the View area, select the options you want by clicking on the checkbox.

These options are

- **Always on Top** - Keeps the Toolbar on top of other running applications.
- **Two lines** - Arranges the buttons on the Toolbar into two rows (saving space).
- **Large Buttons** - Displays large buttons on the Toolbar.
- **Auto Resize** - If this option is not selected, the width of the Toolbar can be resized by dragging the window horizontally.
- **Status Bar** - Adds the Status bar to the Toolbar.

  The Status bar displays information about your current activity.



Step 3 Close the Setup dialog box by clicking on the window's **Close** button.

Defining Agent Toolbar Behavior

You can define how Agent Toolbar opens and closes.

To define Agent Toolbar behavior:

Step 1 From the Toolbar, click **Setup**

The Setup dialog box opens.

Step 2 Click the **Preferences** tab.

Step 3 Select the options you want by clicking on the checkbox.

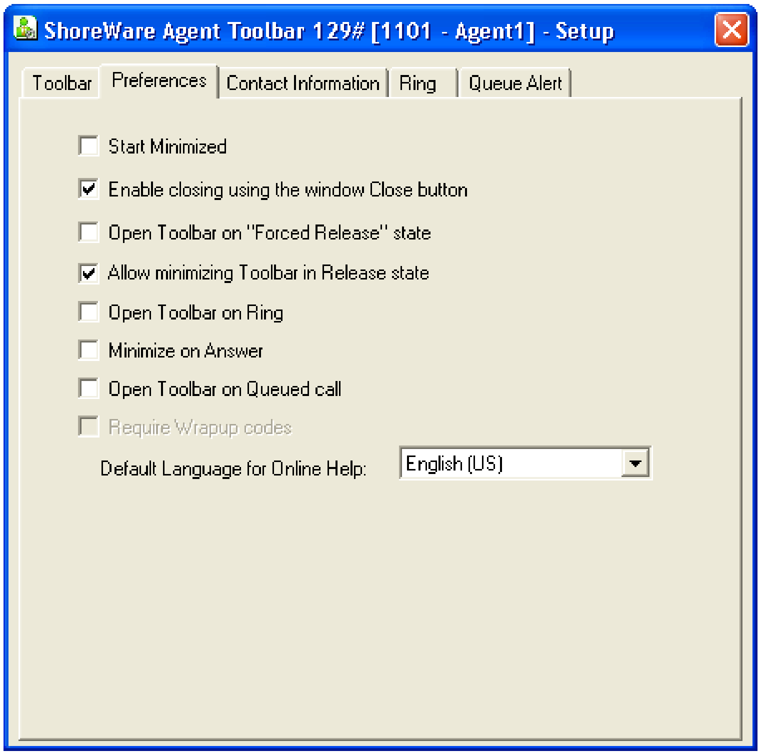
These options are

- **Start minimized** - Start the Toolbar minimized.

  This option is useful in environments in which all agent functionality is embedded in a CRM application, so there is no need to show the Toolbar.

- **Enable closing via the system menu "x" button** - Enables closing the Agent Toolbar by clicking the window Close button.

  Leave this option unselected if you want to prevent the accidental closing of the application by mistakenly clicking the "x" button.



- **Open Toolbar on "Forced Release" state** - Allows the minimized toolbar to pop-up in forced release state, alerting you of any incoming calls.

  Ensures that your are aware of incoming calls when the Agent Toolbar is minimized.

- **Allow to minimize the Toolbar in "Release" state** - Enables you to minimize the Toolbar when in Release state.

- **Open Toolbar on Ring** - Enables the minimized toolbar to pop-up when a call arrives.

  Ensures that your are aware of incoming calls when the application is minimized.

- **Minimize on Answer** - Allows you to minimize the Toolbar when answering a call.

- **Open Toolbar on Queued Call** - Enables the minimized toolbar to pop-up when a called is added to the queue.

  Ensures that your are aware of new calls in queue when the application is minimized.

- **Require wrap-up codes** - Requires a code to be assigned to a wrap-up call.

Step 4 Close the Setup dialog box by clicking on the window's **Close** button.

Changing Your Contact Information

Your extension, server address, and email username are used in Agent Toolbar. If your contact information changes, you can update the information in Agent Toolbar.

You must restart Agent Toolbar for these changes to take affect.

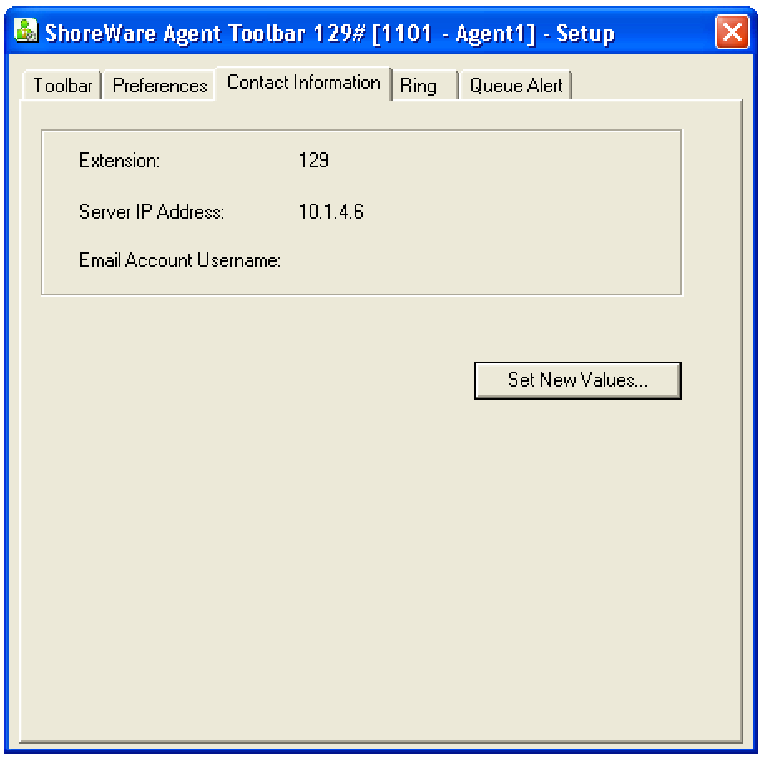
To change your contact information:

Step 1 From the Toolbar, click **Setup**.

The Setup dialog box opens.

Step 2 Click the **Contact Information** tab.

Your default values are displayed.

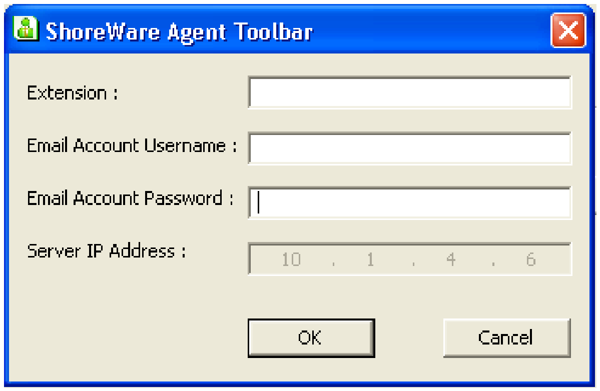


Step 3 Click **Set New Values.**

Step 4 Use the resulting dialog box to change the values, and then click **OK**.

These values are

- **Extension -** Displays the current telephone extension assigned to you. Voice call are routed to this extension.
- **Email Account Username** - The email username used if you are part of a group that receives email.
- **Email Account Password** - The email password used if you are part of a group that receives email.
- **Server IP Address -** The IP address of the Contact Center server.



Step 5 Close the Setup dialog box by clicking on the window's **Close** button.

Setting Ring Options

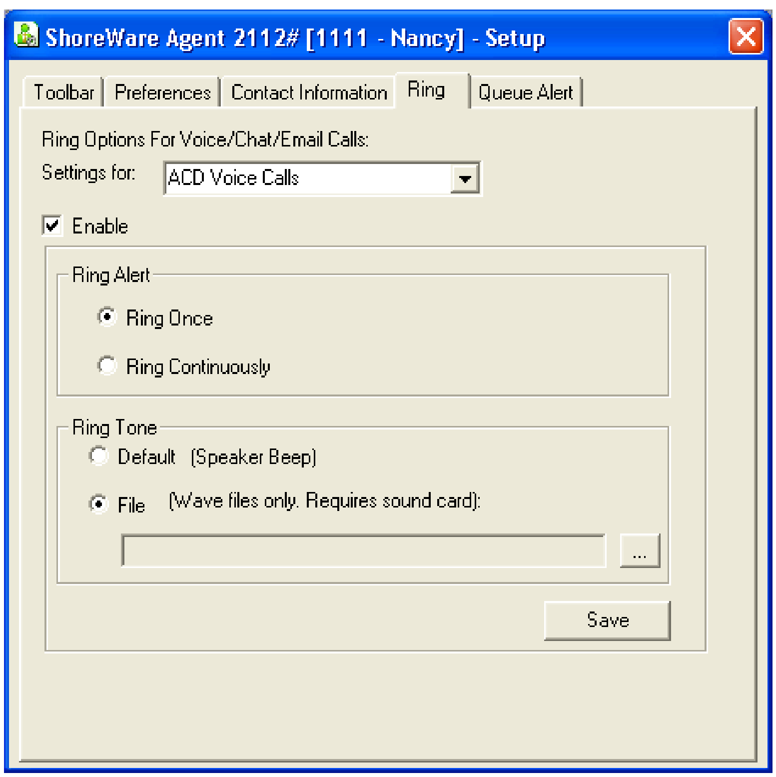
Ring options are available for voice, chat, and email calls.

To set ring options:

Step 1 From the Toolbar, click **Setup**

The Setup dialog box opens.

Step 2 Click the **Ring** tab.



Step 3 Select the options you want.

These options are

- **ACD Voice Calls -** Ring tone is played for ACD voice calls.
- **Email Calls-** Ring tone is played for an email contact.
- **Chat Calls -** Ring tone is played for a chat contact.
- **Outbound Call Confirmation Window -** Ring tone is heard when the Outbound Confirmation Call Confirmation window is open.
- **Non ACD Voice Calls -** Ring tone is played for non-ACD voice calls.

In the Ring Alert area, these options are

- **Ring Once -** The ring tone is heard only once for a ringing call.
- **Continuous Ring -** The ring tone is heard until the call is answered.

In the Ring Tone area, these options are

- **Default** - Your computer's internal speaker generates the ring tone.
- **File** - The ring tone comes from a WAV file. This option requires a computer with sound card.

  Specify the WAV file in the field, or click the ellipsis (...) to locate and select the file.

Step 4 Click **Save**.

Step 5 Close the Setup dialog box by clicking on the window's **Close** button.

Setting Queue Alert Options

Alert options are available for calls in the queue.

To set queue alert options:

Step 1 From the Toolbar, click Setup. The Setup dialog box opens.

Step 2 Click the Queue Alert tab.

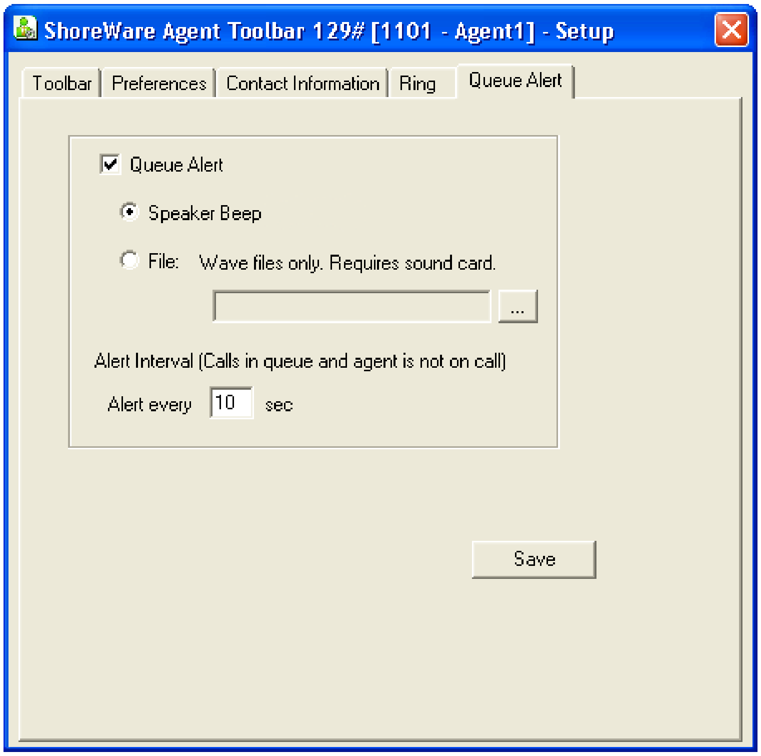
Step 3 Select **Queue Alert**.

Step 4 Select the options you want.

These options are

- **Speaker Beep** - Your computer's internal speaker generates the alert.
- **File** - The alert tone comes from a WAV file. This option requires a computer with sound card.

  Specify the WAV file in the field, or click the ellipsis (...) to locate and select the file.



Step 5 You can change the internal between alerts by entering the interval, in seconds, in the **Alert Every** field.

The alert is sounded only if you have calls in the queue, and you are not on an ACD call.

Step 6 Click **Save**.

Step 7 Close the Setup dialog box by clicking on the window's **Close** button.

Selecting Toolbar Features

By default, Agent Toolbar's toolbar contains buttons for the features selected by your administrator. You can add additional buttons, program buttons for one-click use, and remove buttons.

Adding Buttons to the Toolbar

You can add buttons to the Toolbar for easy access to the features you most commonly use.

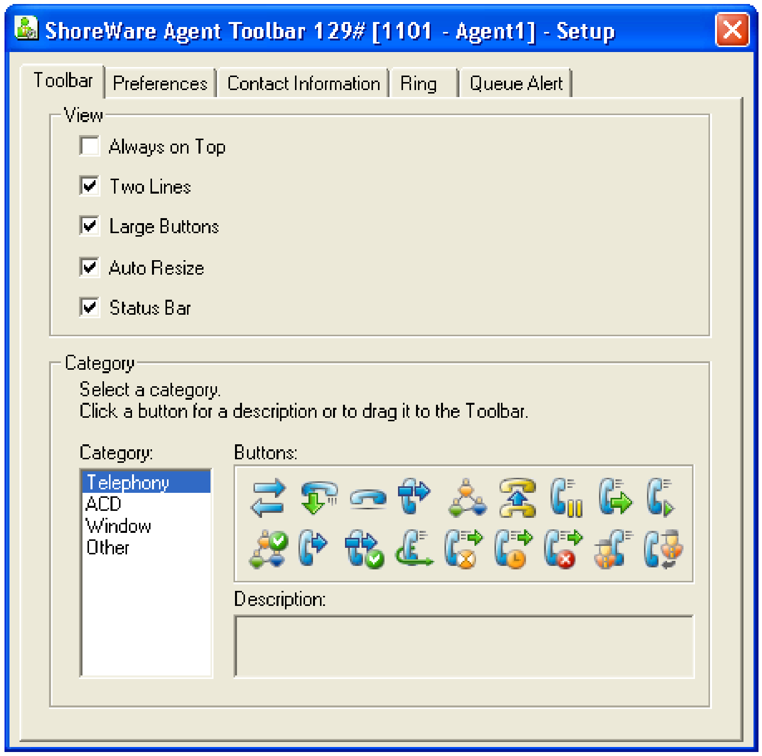
To add a button to the Toolbar:

Step 1 From the Toolbar, click **Setup**

The Setup dialog box opens, with the Toolbar tab selected by default.

Step 2 In the Category area, select the appropriate button category.

The buttons in the category are shown in the Buttons area.



Step 3 For a description of a button, select it and view the details in the Description area.

If a button can not be added to the Toolbar, the button description includes a notation to this affect.

Step 4 Click the button you want to add, and drag-and-drop it to the desired position on the Toolbar.

Step 5 If the button requires parameters, the associated dialog box appears. Use the dialog box the define the button's parameters. See Programming Buttons on page 40 for specifics.

Step 6 Close the Setup dialog box by clicking on the window's **Close** button.

Programming Buttons

You can program both the buttons that require destination numbers, and the buttons that require other types of parameters. Programming a button allows you to use the feature with just one click.

These buttons can also be programmed to instead prompt you for a parameter each time you use the feature. You can also change the default programming of a button.

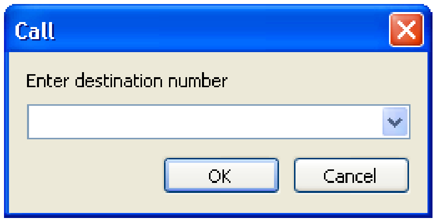
Note that if you program the Transfer to Agent button with the extension of an agent in another group, the system treats the transfer as a non ACD call. As a result, you are unable to use Agent Toolbar's ACD features, like Wrap-Up, with the call. Instead, program the Start Transfer button with the agent's extention.

To program a button:

Step 1 Add the button to the Toolbar.

See Adding Buttons to the Toolbar on page 39 for information.

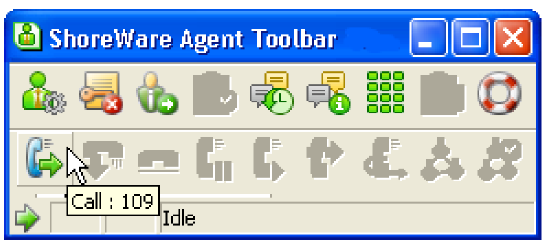
The appropriate dialog box opens.



Step 2 If you want to be prompted for a parameter each time you use the feature, click **Cancel**.

Step 3 If you want to program the button with a parameter, enter the parameter in the field; recently used parameters can be selected from the drop-down list. Then click **OK**.

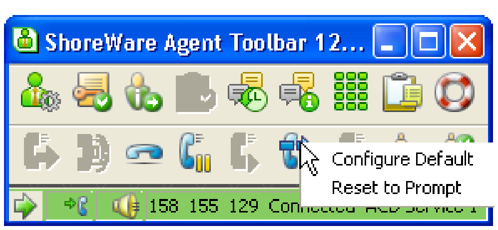
The button is programmed with the parameter. To verify, point your mouse to the button on the Toolbar. The button label displays the new parameter.



To change the programming of a button:

Step 1 Right-click the button on the Toolbar.

Step 2 If you want to be prompted for a parameter each time you use the feature, from the popup menu select **Reset to Prompt**.



Step 3 If you want to program the button with a parameter, from the popup menu select **Configure Default**. In the resulting dialog box, enter the parameter in the field; recently used parameters can be selected from the drop-down list. Then click **Save**.

Removing Buttons from the Toolbar

If you do not use a feature all that often, you can remove the button from Agent Toolbar's toolbar to make better use of the space.

To remove a button from the Toolbar:

Step 1 From the Toolbar, press and hold the SHIFT key, click on the button you want to remove, and drag-and-drop the button onto your desktop.

Personalizing Telephone Manager

Telephone Manager can be personalized by editing the tabs and programming the buttons for specific telephony operations.

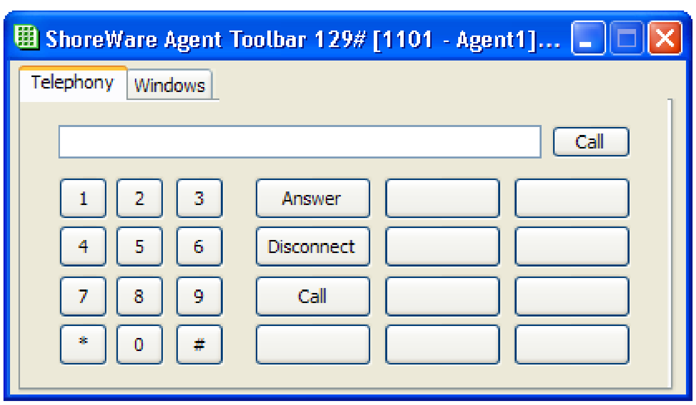
Editing Tabs

In Telephone Manager, you can add, rename, and remove tabs. You may want add a tab to Telephone Manager for additional Toolbar operations, such as ACD:

To add a tab to Telephone Manager:

Step 1 From the Toolbar, click **Telephone Manager.**

Telephone Manager opens.



Step 2 Right-click on a tab. In the resulting pop-up menu, click **Insert**.

New tabs are inserted to the right of the selected tab.

Step 3 In the Insert Page dialog box, type the name of the new tab in the New Name field, and then click **OK**.

The new tab contains 20 non-captioned buttons. See Programming Telephone Manager Buttons on page 43 for information on assigning functionality to these buttons.

To rename a tab in Telephone Manager:

Step 1 From the Toolbar, click **Telephone Manager.**

Telephone Manager opens.

Step 2 Right-click on the tab you want to rename. In the resulting pop-up menu, click **Rename**.

Step 3 In the Rename Page dialog box, type the new name new tab in the New Name field, and then click **OK**. The tab name is changed.

To remove a tab from Telephone Manager:

Step 1 From the Toolbar, click **Telephone Manager**. The Telephone Manager opens.

Step 2 Right-click on the tab you want to remove.

Note that the Telephony tab cannot be removed from Telephone Manager; however, the tab name can be changed.

Step 3 In the resulting pop-up menu, click **Remove**.

Step 4 In the confirmation dialog box, click **OK**.

The tab is removed from Telephone Manager. Note that all associated button properties for that tab are lost.

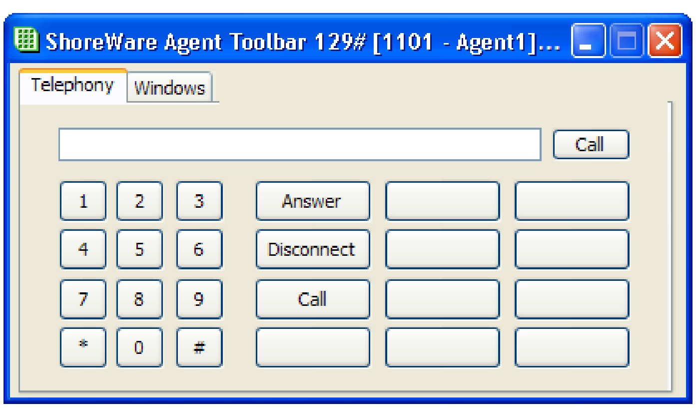
Programming Telephone Manager Buttons

The Telephony and Windows tabs, by default, have both assigned and unassigned buttons. In addition, new tabs that you create are made up of entirely unassigned buttons. You can programmed buttons with the appropriate functionality, or change the functionality already assigned to a button.

It is good practice to program buttons with functionality based on category. This makes it easier for you to find the button you need. For example, the buttons in the Windows tab should be programmed with functionality pertaining to Agent Toolbar windows.

To program a button in Telephone Manager:

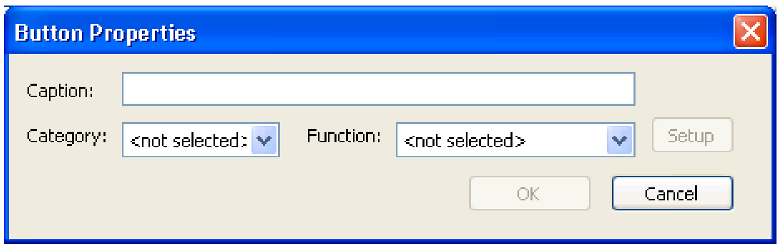
Step 1 From the Toolbar, click **Telephone Manager.** Telephone Manager opens.



Step 2 Click the tab containing the button you want to program.

Step 3 Right-click the button, and click **Properties** from the pop-up menu.

The Button Properties dialog box opens.



Step 4 In the Button Properties dialog box, specify the button properties. These are:

- **Caption** - The name for the button.

  Use a name that reflects the function and parameters assigned to the button.
- **Category** - The type of button functionality, available from the drop-down list.
- **Function** - The button's functionality, available from the drop-down list.

  The functions in the list are based on the selected category.

Step 5 If the button requires parameters, the Setup button becomes active. Click **Setup**. In the resulting dialog box, specify the appropriate parameters, and click **Save**.

Step 6 In the Button Properties dialog box, click **OK**.

The button is now named and, when clicked, executes the programmed function.

To clear a button's programming:

Step 1 From the Toolbar, click **Telephone Manager.** Telephone Manager opens.

Step 2 Click the tab containing the button you want to clear.

Step 3 Right-click the button, and click **Clear** from the pop-up menu. The button properties are removed, including the button name.

Defining Columns

Columns can be added to or deleted from the Calls Status, Queue Calls, and Agent Log windows. You add a new column to capture additional details about your calls.

The columns in the Call Status window determine the information on the current call shown in the Status Bar.

This feature is only available if your administration has given you the COS permission "Change Window Columns."

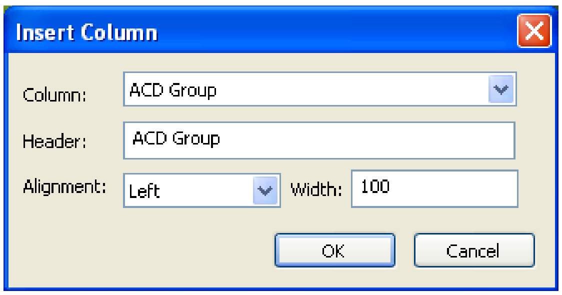
To add a new column:

Step 1 In the appropriate window, right-click on a column heading.

The new column is inserted to the left of the selected header.

Step 2 From the pop-up menu, select **Insert Column**.

The Insert Column dialog box appears. The fields are filled with default information.



Step 3 In the Column field, from the drop-down menu, select the appropriate column type.

Step 4 Type the column title in the Header field.

Step 5 From the Alignment drop-down list, select the new column's alignment.

Step 6 Use the Width field to change the default width of 100.

Step 7 Click **OK**.

To delete a column:

Step 1 In the appropriate window, right-click on the heading of the column you want to remove.

Step 2 From the pop-up menu, select **Delete Column**. The column is removed.

CHAPTER 4

Agent Toolbar Reference

This chapter contain reference information for ShoreWare Agent Toolbar.

Summary of Fields for Agent Use

The following fields are available for agent use in Agent Toolbar:

- ACD Group: The ACD group to which the call belongs.
- Called: The extension the call is going to (your phone number).
- Calling: Caller phone number (if available).
- Elapsed: Time in the current state.
- Last Redirection: Refers to the device that re-routed the call. For example, if a call that entered IRN 6020 was routed to music, the last redirection will be IRN 6020. If the call is then routed from music to an IVR port, the last re-direction will be music.
- Originally Called: Number that was originally called. In the above example on Last Redirection, the Originally Called number refers to the IRN.
- Time: Time when the ACD contact started ringing on the agent phone. The time is set to system clock on the agent computer.
- Trunk: Refers to the trunk where the call entered via this trunk.
- ACD Enter Date: Refers to the date the contact entered.
- ACD Enter Time: Refers to the time the contact entered.
- ACD Q Time: For queue calls, this is the time the call is queued in this specific group.
- Caller Name: Refers to the customer that sent the call, if the customer name currently exists in the system.
- DNIS: Refers to the DNIS number. (A series of digits identifying the number dialed by the caller.)
- ANI: The ANI number or Caller ID. (A series of digits identifying the caller.)
- Priority: Priority level assigned to this contact. A priority level is assigned to each contact on a scale of 1 to 100, where the number 100 is the highest priority.
- Q position: Sequential number of the contact in the queue.
- Service: Specific service required by the caller; for example, sales of specific products or specific banking services. Service identifies the type of call that is routed to the appropriate agent.
- Creation Time: Refers to the time the call started ringing on the agent phone.

- Deletion Time: Refers to the time the contact left the agent phone, either on disconnect or going to another destination.
- State: Refers to the current state of the call or the agent.
- Last State: Refers to the last state before the call left the agent phone that is relevant to the Agent Log.
- Waiting Time: Wait time in queue.
- Average Q Time: Expected time in queue before the call is answered.
- Call Back Destination: Refers to the number the caller entered as the callback destination.
- Call Back Time: Refers to the time the caller entered as the required callback time.
- Customer Name: Refers to the customer name that exists in the customer table.
- Customer Number: Refers to the customer number that exists in the customer table.
- Dial List ID: Dial list name.
- Language: Refers to the language the caller will hear in announcement.
- Media: Defines the media type for the call: Voice, Chat, or Email.
- Session ID: Defines the chat session ID.
- Start Q Time: Refers to the time the contact entered the queue.
- Type: Specifies if the contact is Inbound or Outbound.
- Email Sent Date: Refers to the date when the customer sent the email.
- Email Sent Time: Refers to the time when the customer sent the email.
- Email From: Refers to the customer or sender email address.
- Email To: Refers to the email address where the customer sent the email.
- Email Subject: Refers to the subject of the email message.

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