

Finesse Agent Desktop Training

PRESIDIO®

Future. Built.

Finesse Agent Login

- <https://telcontactcenter1.voip.purdue.edu:8445/desktop/>
- <https://lambcontactcenter2.voip.purdue.edu:8445/desktop/>
- The **User ID** and **password** are case sensitive.
- Log in using your Finesse **User ID** and **password**.
- Use your Agent extension number.



Cisco Finesse

jeffrees

.....

2222

Sign In

[Change the language](#)

Finesse Agent Desktop

Agent State

Dial pad

Profile/Sign out

Page Tabs

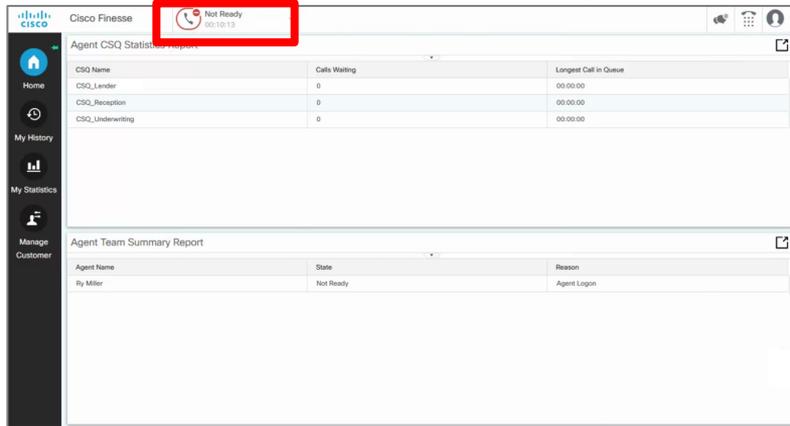
Queue Statistics

Team Summary

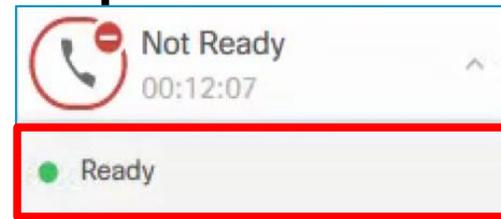
| CSQ Name | Calls Waiting | Longest Call in Queue |
|------------------|---------------|-----------------------|
| CSQ_Lender | 0 | 00:00:00 |
| CSQ_Reception | 0 | 00:00:00 |
| CSQ_Underwriting | 0 | 00:00:00 |

| Agent Name | State | Reason |
|------------|-----------|-------------|
| Ry Miller | Not Ready | Agent Logon |

READY/NOT READY



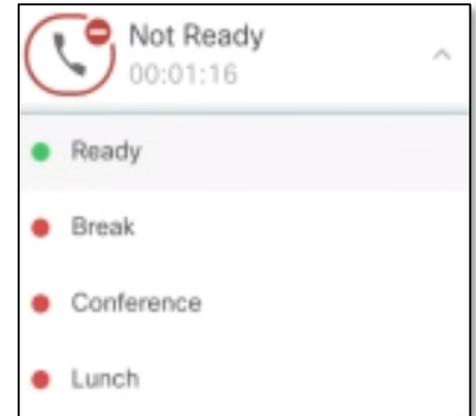
You will be signed into a **Not Ready** state. To Make yourself ready, click on pulldown tab



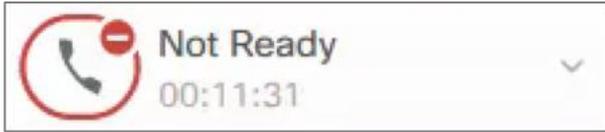
and select **Ready** .

NOT READY REASON CODES

Any time you need to change your agent state, click the pulldown tab and select **Ready** or **Not Ready**. When selecting **Not Ready**, you will need to select a **Reason Code** for that state.



Agent States



Not Ready: When agent is unable to take a queue call, he/she will select **Not Ready** and the reason code.



Ready: If an agent is available for queue calls, he/she will select **Ready**.

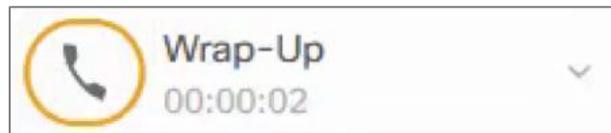


Reserved: Indication that agent has been selected to take the next call.

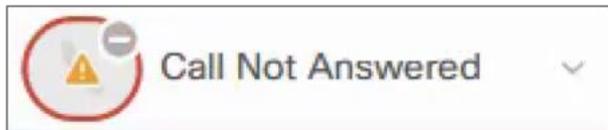
Agent States



Talking: Indicates that agent is on an active call.



Wrap-Up: When queue calls are completed, a **x**-second work timer will give agent time to finish up the with previous call's paperwork and prepare desk top for next call.



Calls Not Answered: If an agent misses a queue call without putting putting himself/herself in **Not Ready**, Calls Not Answered will appear as the agent state.

Calls in Queue

| Agent CSQ Statistics Report | | |
|-----------------------------|---------------|-----------------------|
| CSQ Name | Calls Waiting | Longest Call in Queue |
| CSQ_Underwriting | 1 | 00:00:00 |

- **Agent CSQ Statistic Report** on **Home**  tab gives the count of calls waiting in queue.
- Shows longest time someone has been waiting in the queue.
- To receive calls in the queue, put yourself in a **Ready** state.

Agent Team Summary



The screenshot shows a web interface titled "Agent Team Summary Report". It contains a table with the following data:

| Agent Name | State | Reason |
|------------|-----------|-------------|
| Ry Miller | Not Ready | Agent Logon |

- Team Summary Report** allows agent to:
- See team members' **State** of **Ready**, **Not Ready** or **Talking**.
 - View **Reason** for team member's **Not Ready** state.

My History

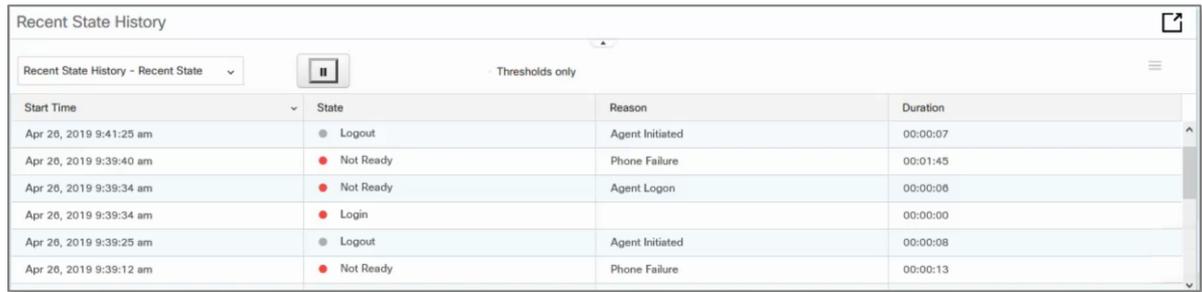


| Type | Number | Disposition | Wrap-Up Reason | Queue | Start Time | Duration | Actions |
|----------|--------------|-------------|----------------|-------|-------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Outbound | +16784570137 | Unanswered | | | Apr 26, 2019 9:56:09 am | 00:00:13 |   |

To view your **Recent Call History** open the **My History**  tab. You will see inbound and outbound calls. To return the call:

1. Click on the green handset  icon. A dial pad will appear with the telephone number prepopulated in the dial box.
2. Select **Enter** or **Return** on your keyboard.

My History



Recent State History - Recent State

Threshholds only

| Start Time | State | Reason | Duration |
|-------------------------|-------------|-----------------|----------|
| Apr 26, 2019 9:41:25 am | ● Logout | Agent Initiated | 00:00:07 |
| Apr 26, 2019 9:39:40 am | ● Not Ready | Phone Failure | 00:01:45 |
| Apr 26, 2019 9:39:34 am | ● Not Ready | Agent Logon | 00:00:06 |
| Apr 26, 2019 9:39:34 am | ● Login | | 00:00:00 |
| Apr 26, 2019 9:39:25 am | ● Logout | Agent Initiated | 00:00:08 |
| Apr 26, 2019 9:39:12 am | ● Not Ready | Phone Failure | 00:00:13 |

Recent State History shows:

- **State** – Logged-In, Logout, Ready/Not Ready, Reserved, Talking or Work.
- **Recent Code** – Shows each **Not Ready** reason code selected throughout the day.
- **Duration** – Time agent spent in each state.

Agent Statistics Report

| Agent Statistics Report | | | | | | | | | | | | | | | | |  |
|-------------------------|---------|-----------|----------|----------|-----------|----------|----------|----------|----------|----------|-----------|----------|----------|-----------------|----------|----------|-------------------------------------------------------------------------------------|
| Calls Off... | 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 | |
| 0 | 0 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:04:16 | 00:07:28 | 00:28:54 | 00:00:00 | 00:00:00 | 00:00:00 | |

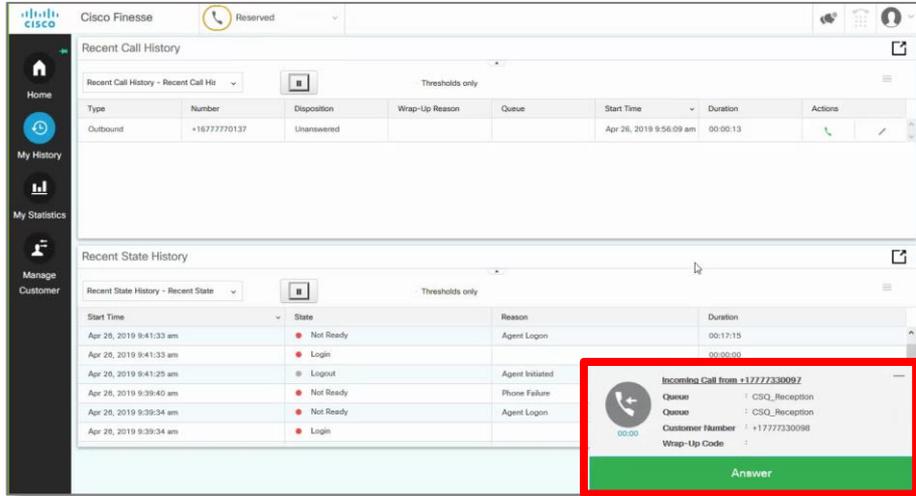
To view your call statistics, select the **My Statistics**  tab. These are real time statistics, updated about every 30 seconds.

Agent Statistics Report

| Agent Statistics Report | | | | | | | | | | | | | | | | |
|-------------------------|---------|-----------|----------|----------|-----------|----------|----------|----------|----------|----------|-----------|----------|----------|-----------------|----------|----------|
| Calls Off... | 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 |
| 0 | 0 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:04:16 | 00:07:28 | 00:28:54 | 00:00:00 | 00:00:00 | 00:00:00 |

Agent Statistics Report allows agent to see **Calls Offered** and **Handled**, **Hold Time**, **Ready/Not Ready** times and **After Call Work** timer.

Call Handling – Answering a Call



The screenshot displays the Cisco Finesse interface. At the top, it shows 'Cisco Finesse' and a 'Reserved' status. Below this, there are two main sections: 'Recent Call History' and 'Recent State History'. The 'Recent Call History' section contains a table with columns for Type, Number, Disposition, Wrap-Up Reason, Queue, Start Time, Duration, and Actions. The 'Recent State History' section contains a table with columns for Start Time, State, Reason, and Duration. At the bottom of the screen, an 'Incoming Call from +1777330092' notification is displayed, which is highlighted with a red box. The notification includes a call icon, a timer showing '00:00', and a green 'Answer' button.

| Type | Number | Disposition | Wrap-Up Reason | Queue | Start Time | Duration | Actions |
|----------|-------------|-------------|----------------|-------|-------------------------|----------|---------|
| Outbound | +1677770137 | Unanswered | | | Apr 26, 2019 9:56:09 am | 00:00:13 | |

| Start Time | State | Reason | Duration |
|-------------------------|-----------|-----------------|----------|
| Apr 26, 2019 9:41:33 am | Not Ready | Agent Logon | 00:17:15 |
| Apr 26, 2019 9:41:33 am | Login | | |
| Apr 26, 2019 9:41:25 am | Logout | Agent Initiated | 00:00:00 |
| Apr 26, 2019 9:39:40 am | Not Ready | Phone Failure | |
| Apr 26, 2019 9:39:34 am | Not Ready | Agent Logon | |
| Apr 26, 2019 9:39:34 am | Login | | |

Incoming Call from +1777330092
Queue: CSQ_Reception
Queue: CSQ_Reception
Customer Number: +1777330098
Wrap-Up Code:
Answer

An incoming queue call will appear at the bottom of your screen. To answer the call, click **Answer**.

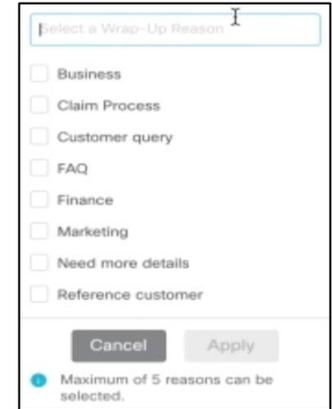
Call Handling – Wrap-up Code



Some centers require a wrap-up code to define the purpose of the call. Assign this code soon after answering the call. Once call is completed you will not be able to assign a code.

Call Handling – Wrap-up Code

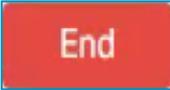
1. In call control area, click on pulldown arrow next to **Wrap-Up (0) ^**.
2. Choose from code options or use search window to find a code.
3. Click Apply. You will see a green check and number of codes near the Wrap-up **Wrap-Up (2) v** button.



The screenshot shows a dialog box titled "Select a Wrap-Up Reason". It contains a search input field at the top. Below it is a list of seven options, each with an unchecked checkbox: "Business", "Claim Process", "Customer query", "FAQ", "Finance", "Marketing", and "Reference customer". At the bottom of the dialog, there are two buttons: "Cancel" and "Apply". Below the buttons, a small blue circle icon is followed by the text "Maximum of 5 reasons can be selected."

Call Handling – Ending a Call



A call handling bar, with queue information as well as caller ID, will appear at the top of the Finesse screen. To end the call, click .

Call Handling – Hold/Retrieve

- To place a call on hold, click .



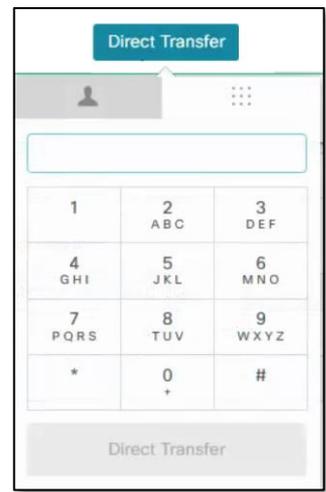
- To take the caller off hold, click .



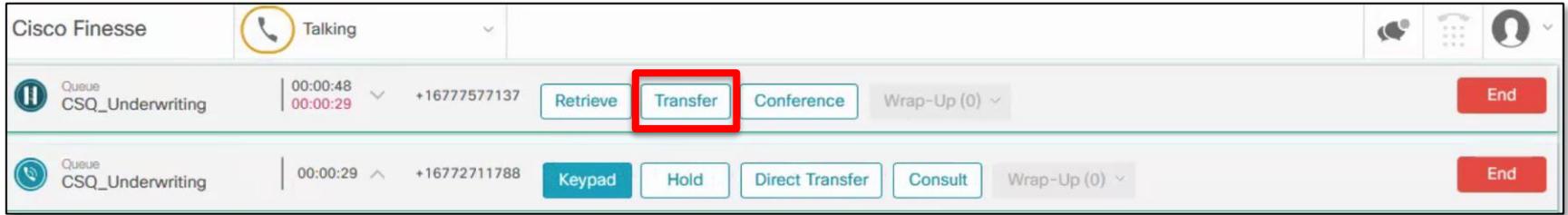
Call Handling – Direct Transfer

To conduct a direct transfer:

1. Click **Direct Transfer**.
2. Use the keypad to dial the number to whom you wish to transfer the call.
3. Click **Direct Transfer** again. Call will be immediately transferred.



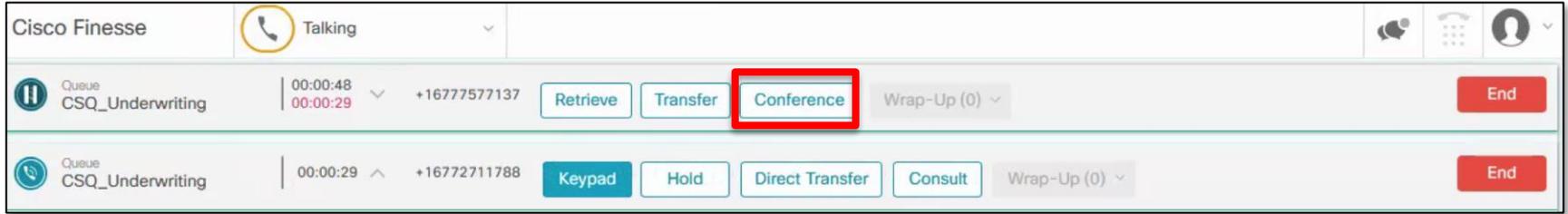
Call Handling – Consultative Transfer



To conduct a consultative transfer:

1. Click **Consult**.
2. Use the keypad to dial the number to whom you wish to transfer the call.
3. Announce the call and then to complete the transfer, select **Transfer**.

Call Handling – Conference



To orchestrate a conference call:

1. Click **Consult**.
2. Use the keypad to dial the internal or external number of whom you wish to add to the conference.
3. Announce the call and then select **Conference**.

Note: You can have up to **x** parties in your call.

Sign Out

To sign out:

1. You must put yourself in **Not Ready** or you will see **Sign Out** as grayed out.
2. Pull down arrow near your avatar .
3. Click **Sign Out**.

