Finesse Agent Desktop Training

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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.

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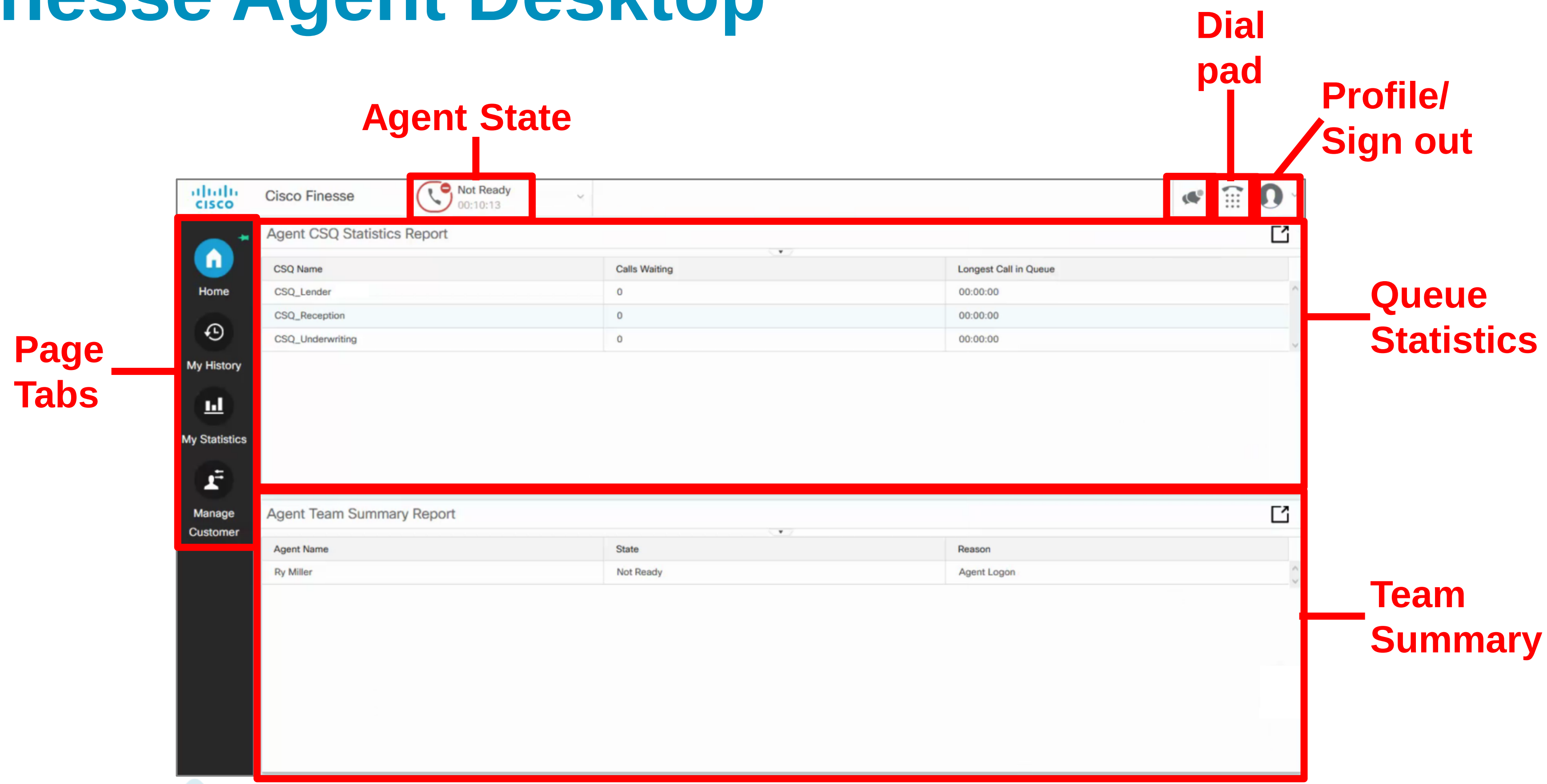
Finesse Agent Desktop



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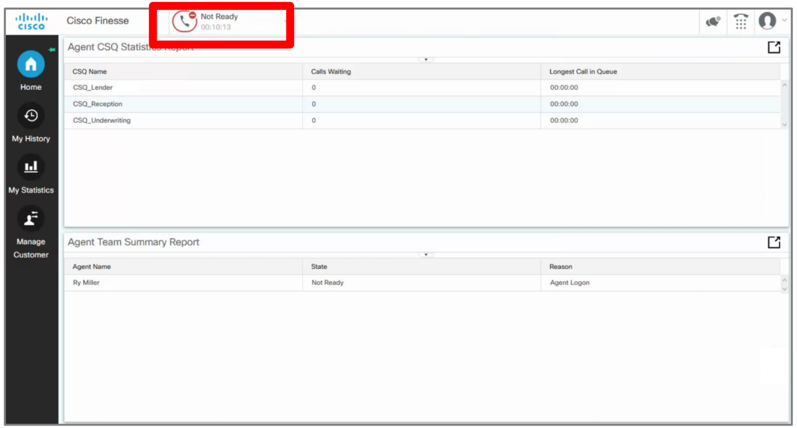
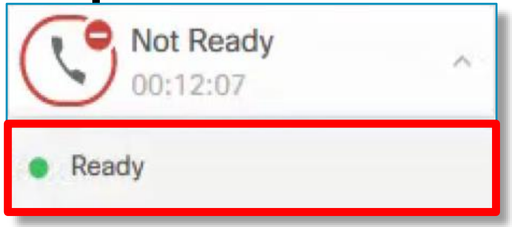
READY/NOT READY



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



and select **Ready** .

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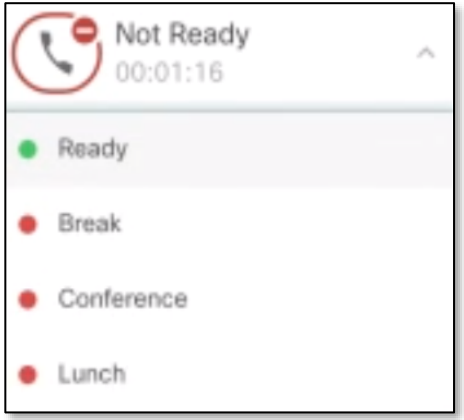
NOT READY REASON CODES

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.



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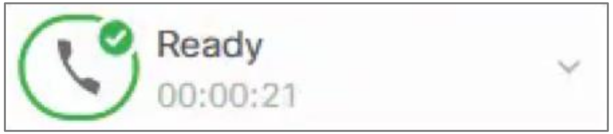
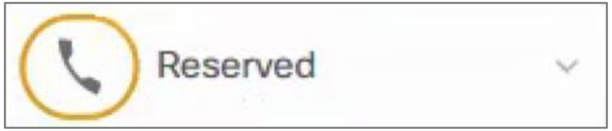
Agent States

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**.

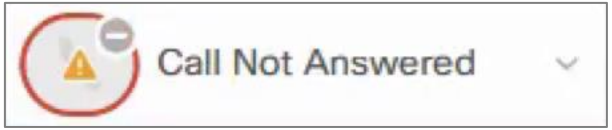


Reserved: Indication that agent has been selected to take the next call.

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 receives calls in the queue, put yourself in a **Ready** state.

Agent Team Summary

Agent Team Summary Report

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.

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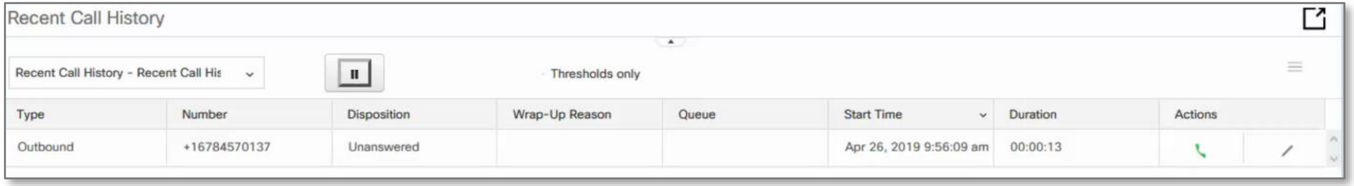
My History


Recent Call History

Recent Call History - Recent Call His

Thresholds only

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.

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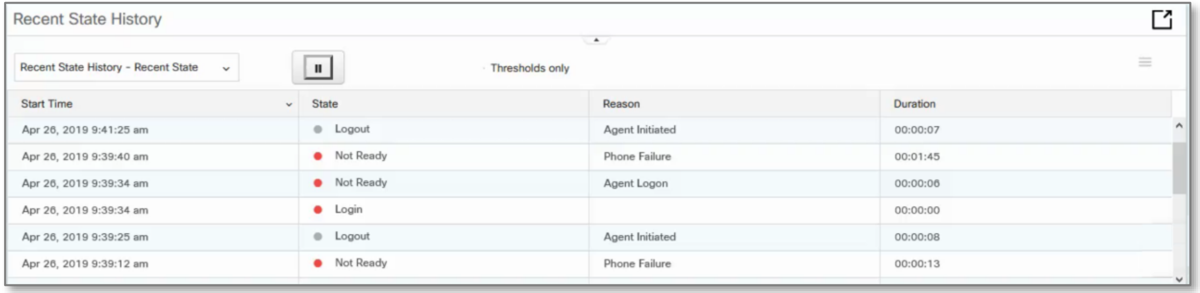
My History



Recent State History

Recent State History - Recent State

Thresholds 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.

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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	00:0

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	00:0

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

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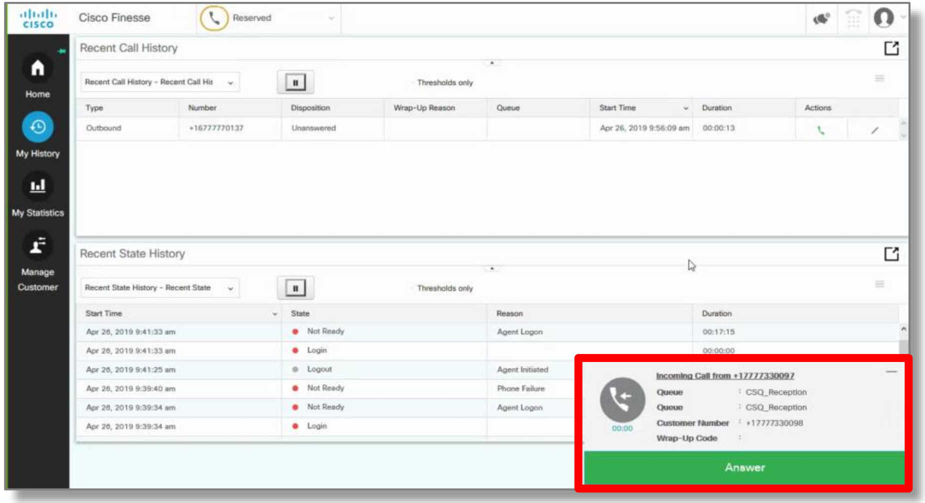
Call Handling – Answering a Call



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

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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.

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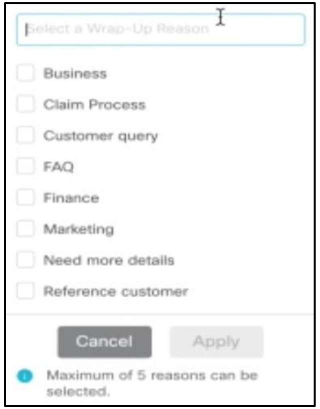
Call Handling – Wrap-up Code

1. In call control area, click on pulldown arrow next to 

.
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 

button.

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Call Handling – Ending a Call

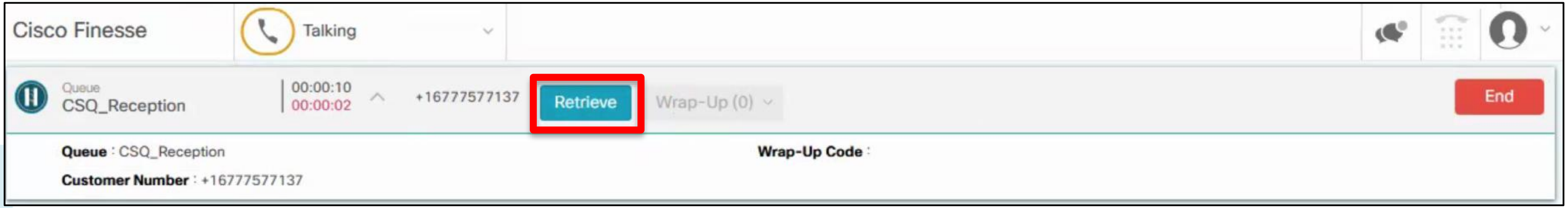
A call handling bar, with queue information as well as caller ID, will appear at the top of the Finesse screen. To end the call, click 

.

Call Handling – Hold/Retrieve

- To place a call on hold, click Hold.

- To take the caller off hold, click Retrieve.



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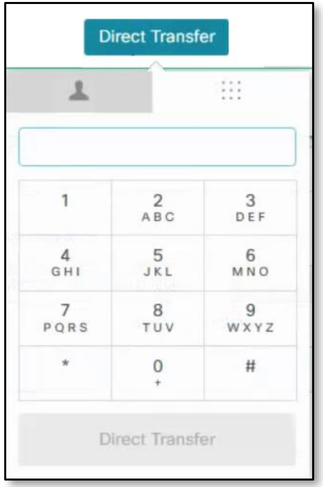
Call Handling – Direct Transfer



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.

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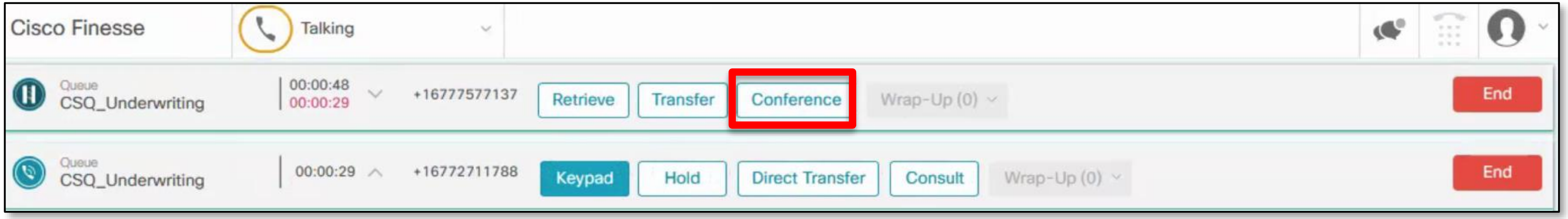
Call Handling – Consultative Transfer

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.

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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**.