Using the Integrated Browser (Premium Only)

If enabled by your administrator, you can use the integrated browser to view web pages while working within Agent Desktop. The administrator can configure the integrated browser so that any web popup window is displayed either as a new tab in the integrated browser, or as a regular Internet Explorer popup window. The integrated browser can have up to 10 tabs. The first tab is always reserved for web pages that your supervisor pushes to you. This enables your supervisor to assist you during a call by providing information that will help you work with a customer.

If configured by your administrator, you can access another website by selecting it from the Work Sites list or by typing a URL in the Address field. To return to your home page, click Home.

Answering E-Mail

(Premium only) If you are assigned to an e-mail contact service queue (CSQ), you can answer customer e-mail. Click the E-Mail Ready button on the toolbar to receive the next available e-mail in the CSQ. Select the e-mail in the contact appearance window to read the e-mail in the Agent E-Mail tab of your integrated browser. Type your reply in the Response pane and click Send to reply to the e-mail.

You can also transfer the e-mail to another CSQ, re-queue the e-mail so that it can be handled by another agent, save the e-mail as a draft to work on at a later time, or delete the e-mail.

When you receive a call, the current e-mail is automatically saved as a draft.

Your administrator configures how many e-mails you can have in your contact appearance pane at one time. The maximum allowed is four saved as drafts and one in process, for a total of five e-mails.

E-Mail Re-queue on Logout

If the re-queue on logout option is enabled, all your e-mails are requeued to another agent when you log. When you re-queue an e-mail, any messages you wrote in reply that are in a draft state are saved automatically with the original e-mail.

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Quick Start Guide

Cisco Agent Desktop

CAD 9.0 for Cisco Unified Contact Center Express 9.0

1 Toolbar Buttons and Keyboard Shortcuts

Icon	Name	Shortcut	Description
	Answer/Drop	Ctrl+A	Answers or drops the selected call.
	Hold/Unhold	Ctrl+H	Places the selected call on hold or takes it off hold.
	Conference	Ctrl+F	Opens the Conference window. When the call is placed, the original party is put on hold.
	Transfer	Ctrl+T	Opens the Transfer a Call window. When the call is placed, the original party is put on hold.
	Touch Tones	Ctrl+D	Opens the Enter Touch Tones window.
	Login	Ctrl+L	Logs you into the ACD (alternates with Logout).
	Logout	Ctrl+L	Logs you out of the ACD (alternates with Login).
	Ready	Ctrl+W	Changes your state to Ready, indicating that you are available to receive ACD calls.
	Not Ready	Ctrl+O	Changes your state to Not Ready, indicating that you are unavailable to receive ACD calls.
	Work	Ctrl+Y	Changes your state to Work, indicating that you are unavailable to receive ACD calls until you finish wrap-up work.
	Task1-10	Alt+1, Alt+2, ..., Alt+0	One to ten task buttons can be set up by the administrator to perform one or several functions.
	Make Call	Ctrl+M	Opens a window from which you can dial a call.
	Chat	Ctrl+J	Opens a window from which you can initiate a chat session.
	Reports	Ctrl+Q	Opens a window that displays your call logs and statistics.
	Contact Mgmt	Ctrl+G	Shows or hides the Contact Management panes.
	Browser*	Alt+B	Shows or hides the integrated browser pane.
	Preferences	Alt+P	Opens a window for configuring Desktop Preferences.
	Help/About	F1	Opens a menu listing the Help and About options.
	E-Mail Ready*	Ctrl+Shift+W	You are available to receive e-mails.
	E-Mail Not Ready*	Ctrl+Shift+O	You are not available to receive e-mails.
	Send*	Ctrl+Enter	Sends your e-mail reply to the customer.
	Transfer*	Alt+T	Displays a drop-down list of available contact service queues to which you can transfer the e-mail.
	Save*	Ctrl+S	Saves the current e-mail as a draft.
	Re-queue*	Ctrl+R	Returns the current e-mail to the contact service queue.
	Delete*	Ctrl+ Backspace	Deletes the current e-mail.
	Print*	Ctrl+P	Prints the current e-mail.
	Forward*	Ctrl+Shift+F	Forwards the current e-mail to an external account.
	Attach*	Ctrl+Shift+H	Attaches a file to the reply
	Template*	Ctrl+Shift+P	Inserts a pre-defined template into the reply at the cursor position
	Spellcheck*	F7	Checks the spelling of the reply

* Premium only

2 Common Tasks

Changing Your Agent State

To change your agent state, click the appropriate state button on your toolbar. Buttons for invalid states will be disabled. If you change your agent state while on a call (in the Talking state), your state will change after you hang up. The agent state buttons indicate the state you clicked, not your current state.

Using Reason Codes

When you change your state to Not Ready or log out, you might be prompted to select a reason code. Reason codes are configured by your administrator and describe the reason you are changing your agent state.

When you are prompted to enter a reason code, select the appropriate code from the Reason Codes window and click OK.

Using Wrap-up Data Descriptions

When you change your state to Work, you might be prompted to select a wrap-up data description. Wrap-up data descriptions are configured by your administrator and describe the outcome of the call.

When you are prompted to enter wrap-up data, select the appropriate description from the Select Call Wrap-up window and click OK.

Handling Phone Calls

Making a Call: Click Make Call. In the Make Call window, enter a phone number in the Number field, and click Dial.

Transferring a Call: With a call active, click Transfer. In the Transfer a Call window, enter a phone number in the Number field, then click Dial.

Conferencing a Call: With a call active, click Conference. In the Conference a Call window, enter a phone number in the Number field, then click Dial, then Add to Conf while the phone is ringing or after the party has answered. Repeat until all parties are added to the conference call.

Sending a Chat Message

On the toolbar, click Chat. In the Contact Selection window, double-click the name of the person with whom you want to chat. In the chat window that opens, type your message in the lower section of the window. If you want your message to pop on the recipient's screen, select the High Priority check box.

You can make a call, transfer a call, or conference a call to anyone listed in your Contact Selection window using the call control actions. Right-click the name of the person you want to call and select the desired action from the popup menu. To call someone, you must be logged into Agent Desktop and be in an agent state that allows you to make a call.