

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.



The screenshot shows the Cisco Finesse login interface. At the top, it says "Cisco Finesse". Below that is a large, faint "Agent" watermark. There are three input fields: the first contains "jeffrees", the second contains masked characters "*****", and the third contains "22222". At the bottom, there is a "Sign In" button and a link that says "Change the language".

Finesse Agent Desktop

Agent State

Dial pad

Profile/Sign out

Page Tabs

Queue Statistics

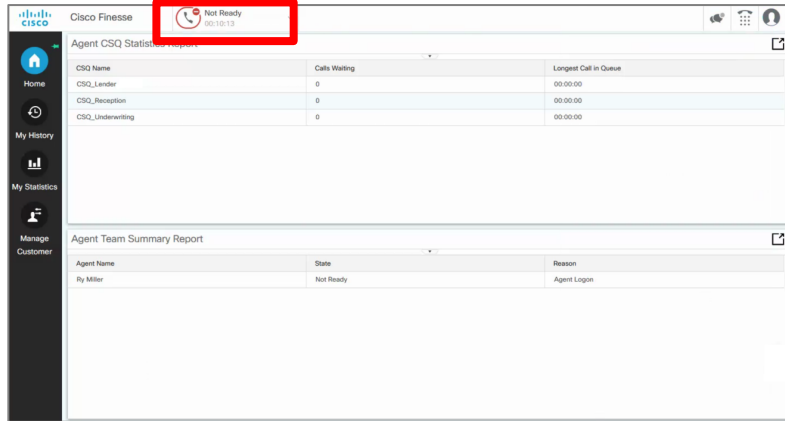
Team Summary

The screenshot shows the Cisco Finesse Agent Desktop interface. At the top, the header bar includes the Cisco logo, the text "Cisco Finesse", and a status indicator showing a red phone icon with "Not Ready" and a timer at "00:10:13". To the right of the header are three icons: a speech bubble, a dial pad, and a profile icon. A red box highlights the "Not Ready" status and the "Not Ready" timer. A red line points from the "Agent State" label to this box. Another red line points from the "Dial pad" label to the dial pad icon. A third red line points from the "Profile/Sign out" label to the profile icon. On the left side, a vertical sidebar contains four icons: a home icon, a clock icon, a bar chart icon, and a person icon. A red box highlights the entire sidebar, and a red line points from the "Page Tabs" label to this box. The main content area is divided into two sections. The top section is titled "Agent CSQ Statistics Report" and contains a table with three columns: "CSQ Name", "Calls Waiting", and "Longest Call in Queue". The bottom section is titled "Agent Team Summary Report" and contains a table with three columns: "Agent Name", "State", and "Reason". A red box highlights the entire main content area, and a red line points from the "Queue Statistics" label to the top section. Another red line points from the "Team Summary" label to the bottom section.

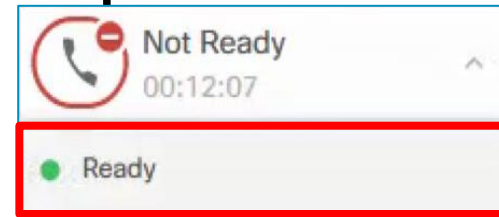
CSQ Name	Calls Waiting	Longest Call in Queue
CSQ_Lender	0	00:00:00
CSQ_Reception	0	00:00:00
CSQ_Underwriting	0	00:00:00

Agent Name	State	Reason
Ry Miller	Not Ready	Agent Logon

READY/NOT READY



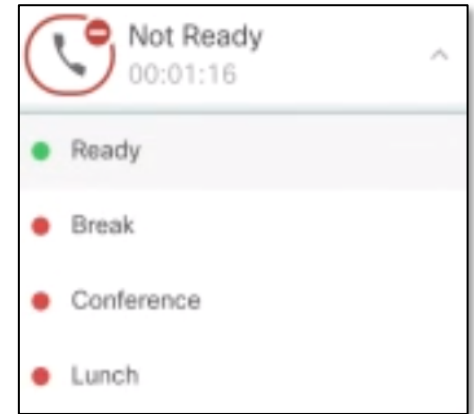
You will be signed into a **Not Ready** state. To Make yourself ready, click on pulldown tab



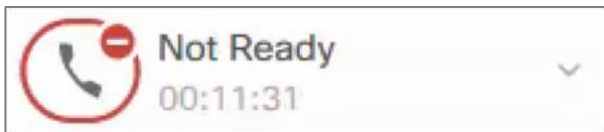
and select **Ready** .

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.

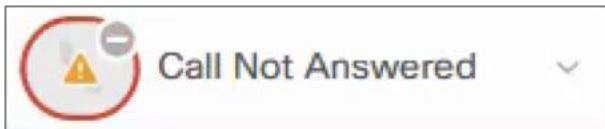
Agent States



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 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

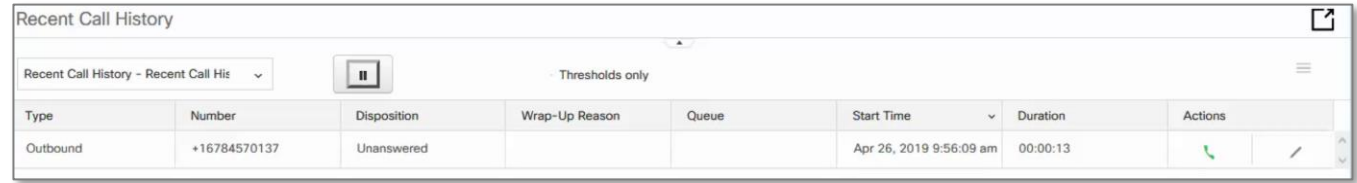
- **Agent CSQ Statistic Report** on **Home**  tab gives the count of calls waiting in queue.
- Shows longest time someone has been waiting in the queue.
- To receive calls in the queue, put yourself in a **Ready** state.



Agent Team Summary


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.

My History

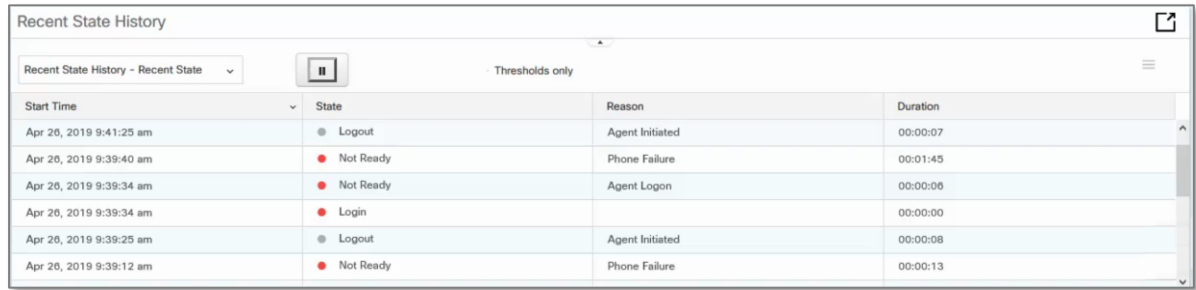


Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Actions
Outbound	+16784570137	Unanswered			Apr 26, 2019 9:56:09 am	00:00:13	 

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



The screenshot shows a web interface titled 'Recent State History'. It features a dropdown menu set to 'Recent State History - Recent State', a pause icon, and a 'Thresholds only' link. Below is a table with four columns: 'Start Time', 'State', 'Reason', and 'Duration'. The table contains six rows of data representing agent state transitions.

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

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

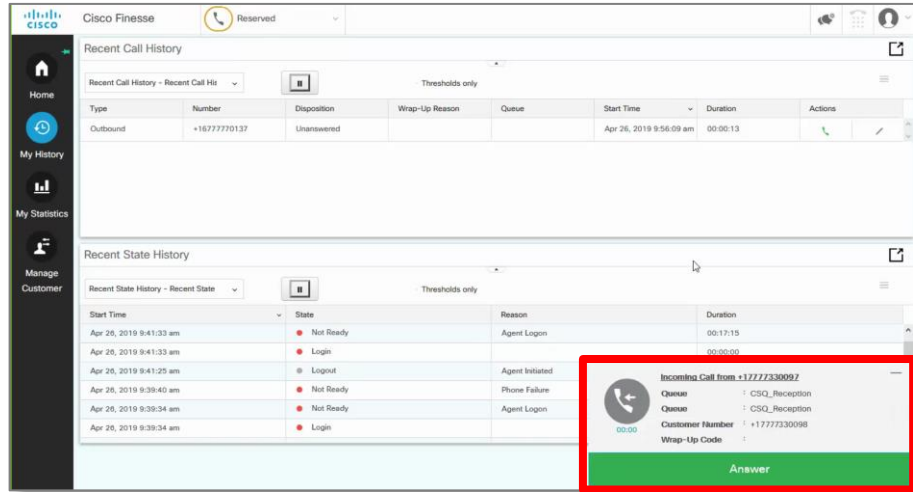
Agent Statistics Report

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 user interface. At the top, the status is 'Reserved'. The main area contains two tables: 'Recent Call History' and 'Recent State History'. The 'Recent Call History' table has columns for Type, Number, Disposition, Wrap-Up Reason, Queue, Start Time, Duration, and Actions. The 'Recent State History' table has columns for Start Time, State, Reason, and Duration. At the bottom right, a red-bordered box highlights an 'Incoming Call from +17777330092' notification. This notification includes details such as Queue (CSQ_Reception), Customer Number (+17777330098), and Wrap-Up Code. A green 'Answer' button is located at the bottom of this notification box.

Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Actions
Outbound	+16777770137	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 +17777330092
Queue: CSQ_Reception
Customer Number: +17777330098
Wrap-Up Code:
Answer

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

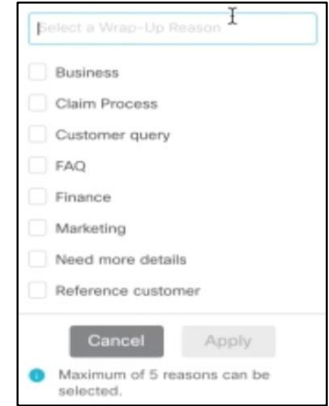
Call Handling – Wrap-up Code



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

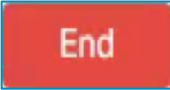
1. In call control area, click on pulldown arrow next to **Wrap-Up (0) ^**.
2. Choose from code options or use search window to find a code.
3. Click Apply. You will see a green check and number of codes near the Wrap-up **Wrap-Up (2) v** button.



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

Call Handling – Ending a Call



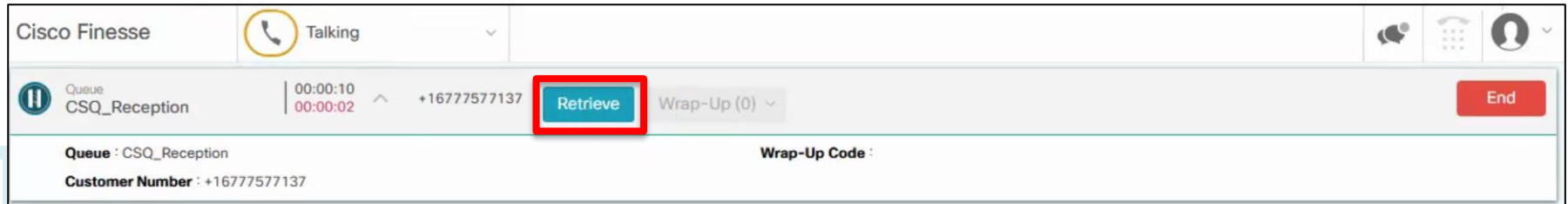
A call handling bar, with queue information as well as caller ID, will appear at the top of the Finesse screen. To end the call, click .

Call Handling – Hold/Retrieve

- To place a call on hold, click .



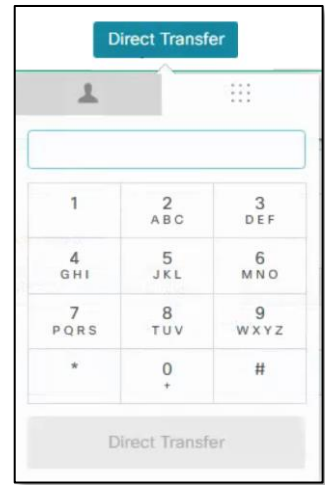
- To take the caller off hold, click .



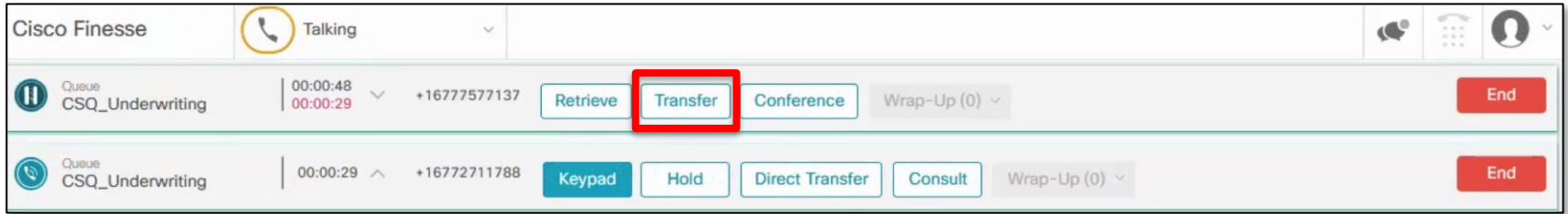
Call Handling – Direct Transfer

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.



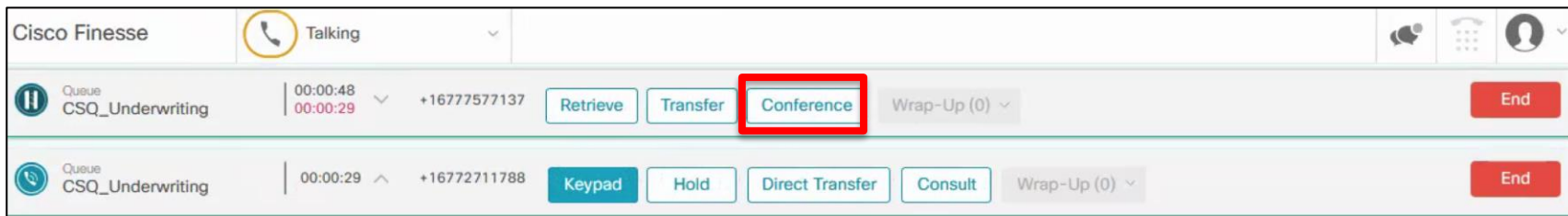
Call Handling – Consultative Transfer



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**.

