Cisco Adapter for Microsoft CRM User's Guide

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Corporate Headquarters
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 526-4100

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Preface

Purpose

This user's guide explains how to use the Cisco Contact Center "add-in" to Microsoft CRM.

Audience

This guide is intended for Microsoft CRM agents, trainers and others who need to know the features and use of the Cisco Contact Center pane.

Organization

Chapter 1, Introduction

This chapter provides quick background on the Cisco Contact Center and how it will help improve your customer contacts. It explains some of the new buttons and screens you will see when you log into Microsoft CRM after the Contact Center is installed and what the Contact Center does.

Chapter 2, Working in the Cisco Contact Center

This chapter explains how to work within the Contact Center. It explains how to login to your ACD account and how to receive, place and manage phone calls.

Chapter 3, Personalizing the Cisco Contact Center

This chapter explains personalization of the Cisco Contact Center to support hot seating, add contacts to the favorites list and set the size of the recent contacts lists.

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, providing documentation feedback, security guidelines, and also recommended aliases and general Cisco documents, see the monthly What's New in Cisco Product Documentation, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

1. INTRODUCTION

Purpose

This user's guide explains how to use the Cisco Contact Center for Microsoft Dynamics CRM. It introduces the Cisco Contact Center, describes its component parts, and explains its use and function as an integral part of Microsoft CRM dedicated to customer contacts.

The Cisco Contact Center works with releases 3.0 and 4.0 of Microsoft Dynamics CRM. It works the same in both releases; the only difference is support for MS CRM 4.0 features, such as multi-language.

What is the Cisco Contact Center?

The Cisco Contact Center is part of the Cisco CRM Adapter for Microsoft CRM. It is an extension, or "add-in" to the Microsoft CRM that provides phone control, agent session management and a screen pop for inbound customer contacts.

The primary purpose of the Contact Center is to help make your job simpler, make you more effective and reduce the common mundane tasks in working and navigating MS CRM.

It adds new functions that allow you to control your ACD session and work mode, to receive, make and control phone calls from within Microsoft CRM, and to execute a "screen pop" of customer information when you answer a customer call.

New User Interface Components in Microsoft CRM

The Cisco Contact Center introduces a number of new components to Microsoft CRM. They all share the Microsoft look and feel, but they extend the features of MS CRM to include contact center call control and coordinate navigation of customer contacts and CRM business actions.

- **The Cisco Contact Center** button on the Wunderbar opens the Cisco Contact Center pane within the MS CRM Navigation pane.
- **Cisco Contact Center pane allows easy navigation to the three Contact Center workplaces.**
- **There are three Cisco Contact Center workplaces that form the core of the Contact Center functions:**
  - **The Home Page** is an embedded web page that may be customized by your organization.
  - **Agent Settings** configures the main agent work place, the Contact Center. It has agent accessible settings to personalize the Contact Center workplace: to set the current extension for hot seating, add contact phone numbers to Favorites, and set the size of the recent contacts list. It also has view-only settings that are configured by system administrators, to assign the agent's queues and ACD ID

and password, set screen pop rules and to establish global Favorites.

- **The Contact Center**, the primary workplace adds a channel controller that features phone and ACD work session management and displays key real-time customer contact information, and a contact data area that screen pops a contact record and allows agents to work on behalf of the calling contact. Together, they enable agent's to coordinate phone call controls and CRM work navigation and business processes in a single Microsoft CRM workplace.

What does the Cisco Contact Center Do?

The Cisco Contact Center adds a number of features that make interacting with customers on the phone easier. This section lists the features. If you are not sure what a specific feature does, their use is described in ***Chapter 2: Working in the Cisco Contact Center for Microsoft CRM.***

It adds new functions that allow you to control your ACD session and work mode, to receive, make and control phone calls from within Microsoft CRM, and to execute a "screen pop" of customer information when you answer a customer call.

ACD Session Management and Phone Controls

The Contact Center adds phone controls. Use these to control your phone and manage your ACD session from within Microsoft CRM. You will still need a telephone or a softphone to talk with customers, but you may use the Contact Center to perform all of the call and ACD session actions.

- **Full agent session control:** allows you to log into and out of your ACD session and to control your work mode.
  - Log into the ACD.
  - Log out of the ACD.
  - Set you work mode:
    - Ready.
    - Work Ready
    - Work Not Ready
    - Not Ready.
    - Set Not Ready with reason.
- **Full call control:** allows you to control your phone and phone calls.
  - Place a call—dial a customer or another agent.
  - Answer an incoming call
    - Answer an ACD call
    - Answer a direct call to your extension
  - Place a call on hold.
  - Retrieve a call from hold.
  - Transfer and conference call controls:
    - Consultative transfer—with a warm handoff.

        - “Blind” transfer—directly to another party.
        - Conference—adds participants to a call.
        - Drop Party—drop a participant from a conference call.
    - Multiple Call Controls—acts on two calls at once:
        - Swap—between held and active calls
        - Reconnect—drop the active call and retrieve held call from hold.

      Note: Multiple call controls require two lines or multiple line appearance. These controls are most commonly used while transferring calls or setting up a conference, but can be used whenever there are two calls present.
    - Drop (“hang up”) a call.

Agent Productivity Features

In addition to call control and ACD session control, the Cisco Contact Center includes a number of productivity tools. These make working customer contacts easier.

- **Screen pop:** Screen pop opens a contact record into the Contact Center Contact Data area. It uses call information to look up the customer in the Microsoft CRM customer records and populate it into the Contact Center. This supports these screen pop scenarios.
    - Screen pop on in-coming or answered calls. Executes an automatic screen pop of a contact record into Contact Data. The contact is identified based on selected call information such as contact calling number (ANI) or dial number, or a key customer associated CRM business object such as a service request, quote or order.
    - Launch customer search; this is used when a customer record cannot be identified from call data or is not present, or should the wrong record screen pop.
    - Deferred or manual screen pop allows agents to receive and answer a new call while working on an open record within Contact Data. This allows agents to finish after call work and still handle an inbound ACD call or to answer a direct dialed call while working with a customer. After finishing with the first record, the agent selects the new contact and presses the Contact Data “Load” button to execute the screen pop.
- **Multiple Contacts:** Multi-line / multi-appearance manages more than one phone call at the same time. This allows agents to switch between calls.
- **Contact Information:** displays key information about each call and its associated contact.
    - Contact information displays the contact’s name, title, and type (whether a customer or a fellow agent).

- Active call information shows information about the current contact call:
  - Call state and times. The controller displays total call times and the current call state.
  - Caller phone number (ANI).
  - Caller dialed number (DNIS).

- **Context sensitive call control**: guides you by only enabling valid phone actions based on the current call state.
- **Favorites:** "speed dial" list of frequently dialed numbers**.**
  - Personal favorites are set by the agent or may be assigned by the administrator.
  - Global favorites are set by the administrator and shared with other contact center agents.
- **Recent Contacts:** lists recent interactions and allows agents to open the customer contact record or callback the customer.
- **Directory and manual dialing:** allows you to place a call by selecting a phone number for an MS CRM contact or account or to enter any phone number.
- **Activity:** allows you to record an interaction activity for the active customer contact.
- **Manage contact record:** protects after call work or current work when a second call arrives before the first call is completed.
  - Load contact record to execute a delayed or manual screen pop or to re-open the contact record after clearing it.
  - Clear contact record
  - Expand (detail) contact record: launch another Microsoft CRM window to perform special business processes.
- **Session information:** displays your CRM user name, your phone extension and ACD ID and queue assignment for the current session.

Personalization Features

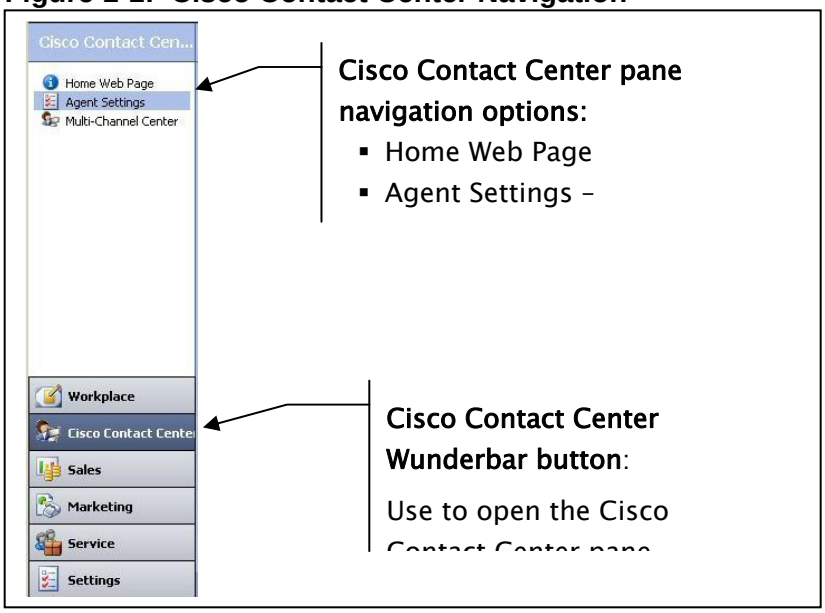
Personalization features allow you to set up special settings for your account.

- Agent extension sets the desk's phone extension for hot seating.
- Recent contact list size sets the number of recent contacts listed.
- Favorites list you add contacts and phone numbers to the Personal list of "speed dial" favorites**.**

Parts of the Cisco Contact Center

Figure 1-1: Cisco Contact Center Navigation shows the new components introduced to Microsoft CRM: the Cisco Contact Center button on the Wunderbar, the Cisco Contact Center pane to the Microsoft CRM Navigation pane and three new workplaces:

Figure 1-1: Cisco Contact Center Navigation



- **Home Web Page:** an embedded web page. Your company can customize this to present their web page or an agent portal.
- **Agent Settings:** allows you to personalize your current settings: favorites and recent contact size, as well as set your extension.
- **The Multi-Channel Center:** the primary work area where you will spend most of your time when working the phone. Chapter 2 of this users guide explains how to work in the Multi-Channel Center.

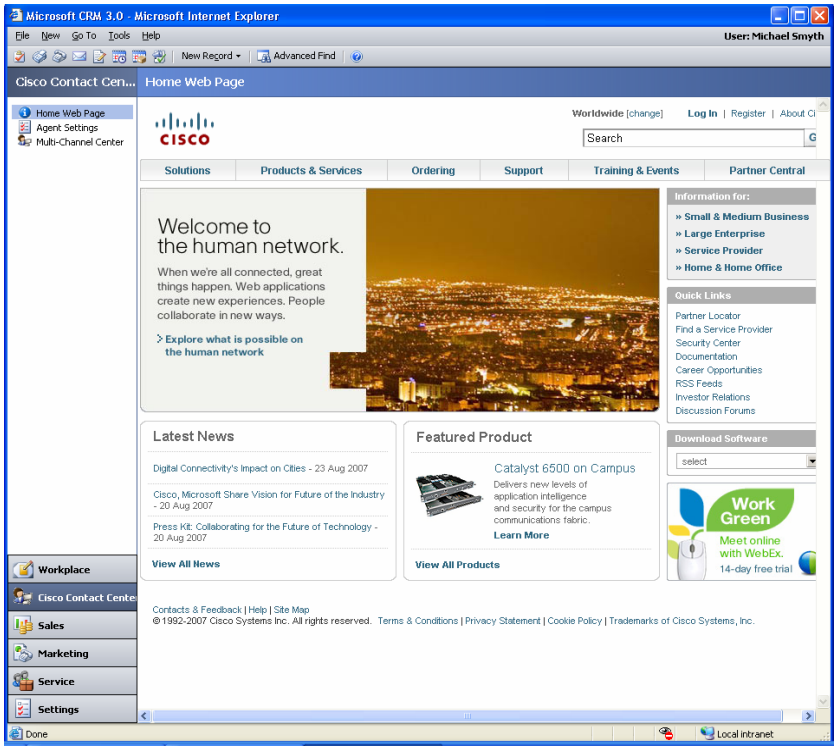
Navigation

Error! Reference source not found. shows the new navigation elements, the Cisco Contact Center button on the Wunderbar and access to the three new workplaces from the Cisco Contact Center pane. This section provides a quick tour of these Cisco Contact Center workplaces.

The Home Web Page

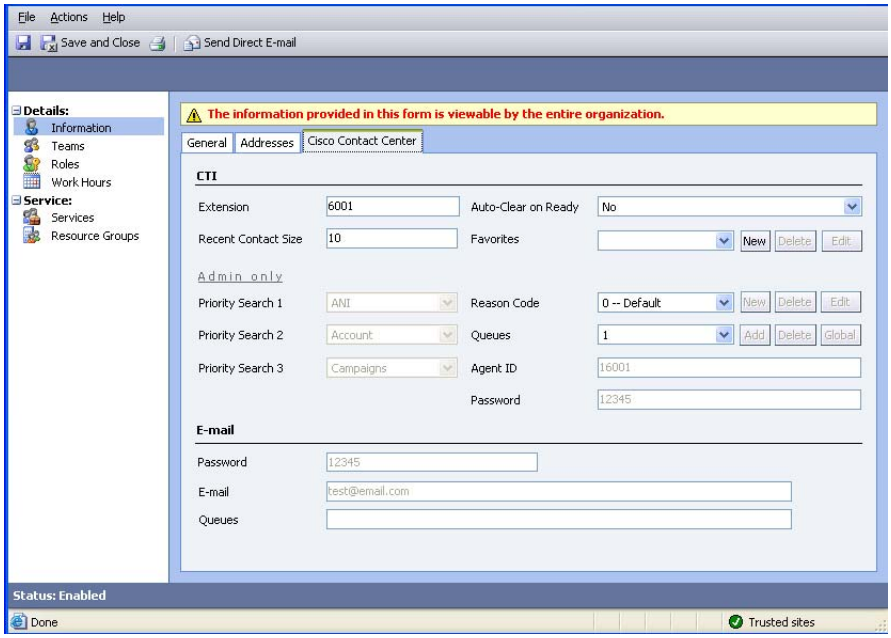
The Home Web Page may be customized by your company, the default page is the Cisco Home Page shown in Figure 1-2: Home Web Page. Use this as you would any web page or portal.

Figure 1-2: Home Web Page



Agent Settings

Figure 1-3: Agent Settings



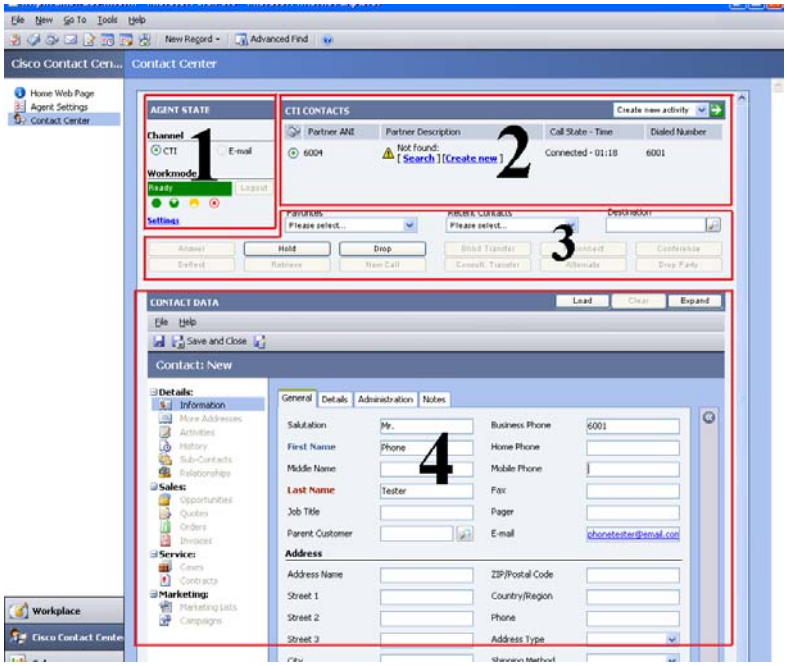
Agent Settings, shown in Figure 1-3: Agent Settings, allow you to personalize some work features. It is divided into two parts: agent

personalization elements are in the top part, the bottom part is restricted to system administrators.

Contact Center

Figure 1-4: Contact Center Layout shows the layout of the Contact Center within the Microsoft CRM window. The contact center is divided into two major parts consisting of four functional areas, each providing important information and features. Figure 1-5: Contact Center Detailshows a closer detail of the Contact Center and its two major parts, the Contact Controller at the top and the Contact Data at the bottom.

Figure 1-4: Contact Center Layout



The Contact Controller

The top third of the Contact Center page, made up of functional areas one (1), two (2) and three (3) is a contact controller. It allows you to perform work session and call control actions, as well as view important information about your current calls.

NOTE: The information and control context in the contact controller stays synchronized with your phone. At any time you may use either your telephone or the contact control to view and control calls, and to change your ACD work state.

Area 1: Agent State (work mode)

Agent State shows your current work mode and allows you to change work modes. Use this to log into and out of the ACD, set your work mode, and select reason codes if you are required to enter a not ready reason.

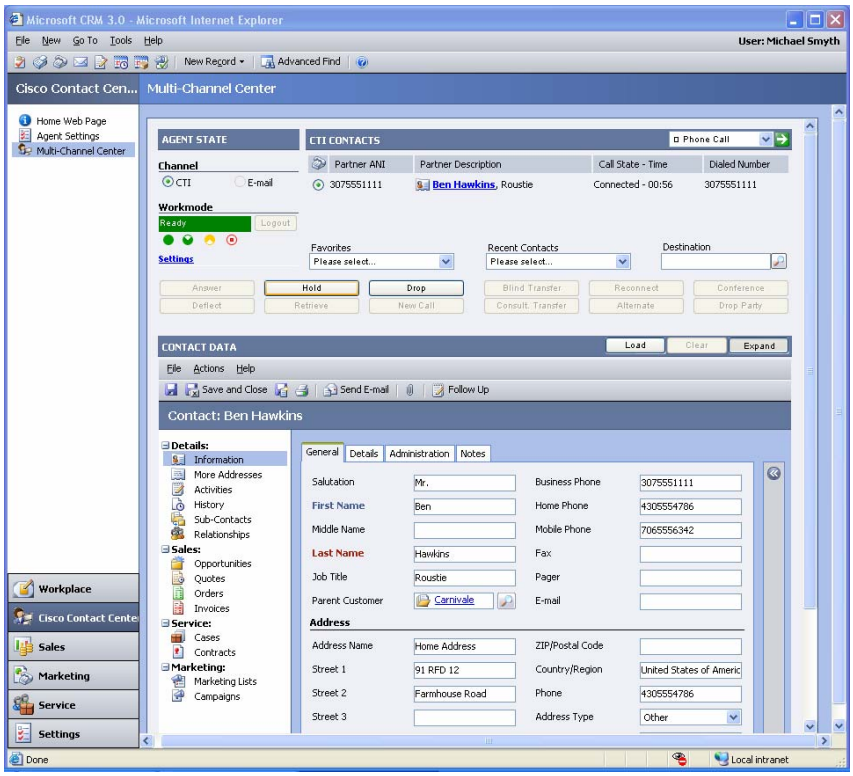
Area 2: Contact Information

Contact Information shows information about phone calls and customer contacts. Use it to switch between calls and set the current contact. There will be one line for each phone call. Each line corresponds to a customer contact and displays the contact information and call times. The radio buttons on the left select the current contact. The drop down in the upper right allows you to create and associate an activity with the current contact.

Area 3: Phone Controls

Phone Controls are context sensitive call controls and the favorites list, the recent contacts list, and a destination box used to enter outbound phone numbers for dialing, transferring and conferencing calls.

Figure 1-5: Contact Center Detail



The Contact Data

The remaining two-thirds of the Contact Center page is the customer work area called the Contact Data. It shows the customer record from the last screen pop. This can only open one customer at a time.

Usually the customer contact matches with the active contact. However, when you are performing after call work or have two customers on the phone at the same time it may not.

Area 4: The Customer Record

The Customer Record presents the standard Microsoft CRM contact data pane; you may perform any tasks and navigation here you would for the standard customer record.

Note that you may only have one open customer record at a time, even if you have more than one call.

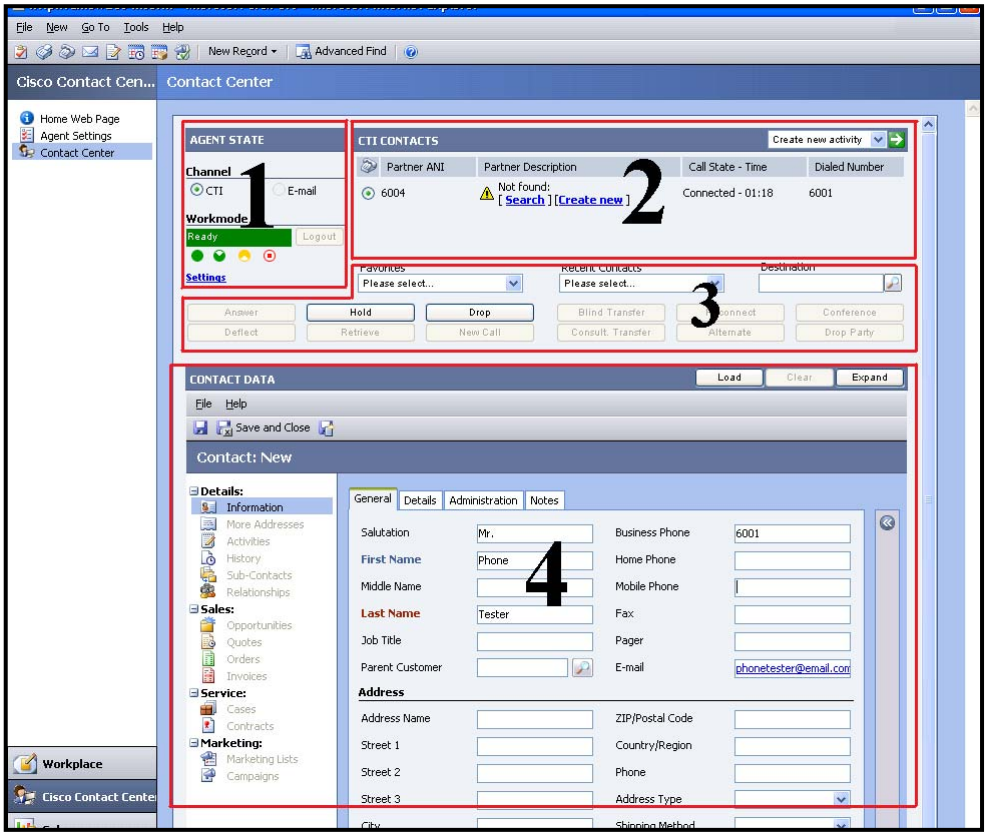
2. WORKING IN THE CISCO CONTACT CENTER

Purpose

This chapter describes how to perform the key functions of your work day using the Cisco Contact Center. It is broken into three sections that describe the core functional capabilities of the Cisco Contact Center pane.

- **Controlling You Sessions** describes how to log into and out of the ACD and set your work mode.
- **Managing Your Contacts** explains how to navigate customer interactions, controlling your phone call with the call controls while working customer transactions within the Contact Data.
- **Screen Pop Process** explains how to receive a screen pop of the caller's customer record into the Contact Data.

Figure 2-1: Contact Center Workplace

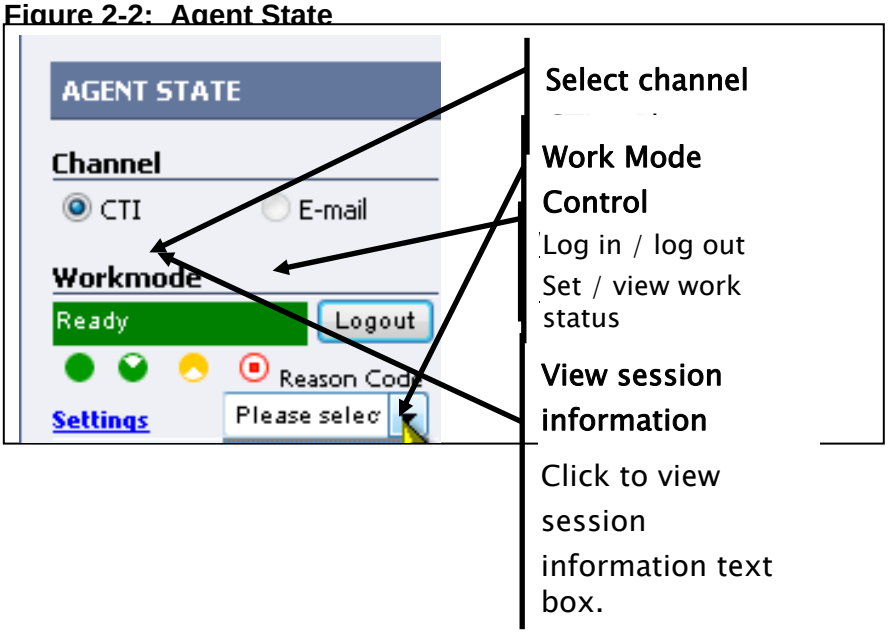


Controlling your session

Use Agent State in the Contact Center upper left (area 1 of Figure 2-1) to view or set your session work mode. Figure 2-2 shows a detail of the Agent State section for a logged in agent. It has these functional controls:

- The **Settings** link opens a text box that shows your current session information.
- The **Channel** button allows you to select the current active work channel. Currently only phones (CTI) are supported; a future release will add e-mail.
- The **Workmode** section controls your ACD work modes. It has three functions:
  - Use the Login/Logout buttons to log into and out of the ACD.
  - The Work State display shows your current work mode.
  - Use the Workmode buttons to set your work mode: Ready, Work Ready, Work Not Ready and Not Ready.

Figure 2-2: Agent State



Log into the ACD

LOGIN STEP-BY-STEP

1. Press the login button to login into the ACD.
2. Your work state will change from "Logged Out" to your default work state, usually "Not Ready." work mode feature will be enabled

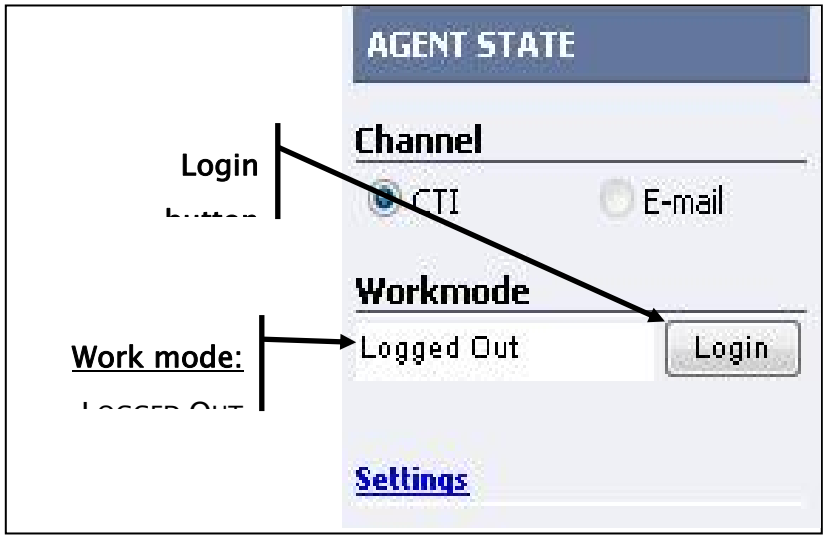
NOTE: Your extension, ACD ID and password are already configured into the Cisco Contact Center Agent Settings of your Microsoft CRM account. Use Agent Settings to enter your extension if you do not have an assigned extension (hot seating).

When you start your session or after you have logged out of the ACD your Agent State will resemble Figure 2-3 the work mode shows "Logged Out" and the Login button displays.

Pressing the login button connects with the ACD and sends your ACD credential, Agent ID, password and extension, to log you into the ACD.

After you log in your Agent State will look like Figure 2-2 or Figure 2-5.

Figure 2-3: Agent State Logged Out



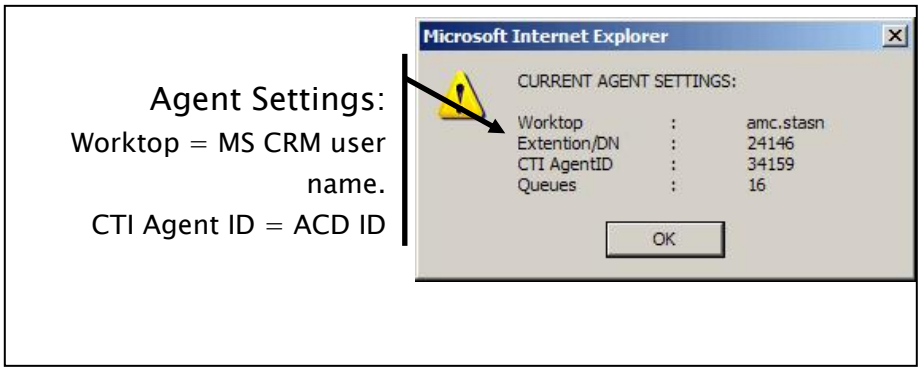
Check your phone and session settings.

CHECK SESSION SETTINGS STEP-BY-STEP

1. On the Agent State control click the SETTINGS link.
2. This opens a dialog box with your settings.
3. Close the dialog box by clicking the OK button.

If you need to check your phone settings, use the Agent State Settings link.

Figure 2-4: Agent Settings



This displays a dialog box with:

- **Worktop**: this is your MS CRM user name.
- **Extension / DN**: information about the agent's monitored extension.
- **CTI Agent ID**: this is your ACD ID
- **Queues**: these are the queues you will receive calls from.

Note: If your center uses hot seating, you use ***Settings*** to check your assigned extension before logging in. Use the Agent Settings personalization page if you need to change the extension.

Set Work Mode

SET WORK MODE Step-by-Step

1. Select the workmode radio button.
2. Your new workmode state will display

Overview

Work mode controls your ACD work state, whether you will receive calls from the ACD. Your call center may not support all work modes.

WARNING: If you have a direct extension, you can always receive a direct call from a customer or another agent.

Setting your work mode.

Select your work mode by pressing the appropriate workmode radio button. There are four possible work mode buttons, they are:

- **Ready** – Go ready and wait for a call.
- **Work Ready** – Go ready for a call, but do other work while waiting.
- **Work Not Ready** – Go not ready for a call to do other work. This is often used at the end of the call to complete a customer interaction: after call work or "wrap-up."
- **Not Ready** – Go not ready. Used to go on breaks or to attend meetings or perform other work.

Note: Your call center may not support all work modes. If a work mode is not supported it will be disabled. Work Ready is rarely used.

You may not be configured to control your work modes. Some ACDs set the work mode for you automatically based on call center rules.

Set Reason Code

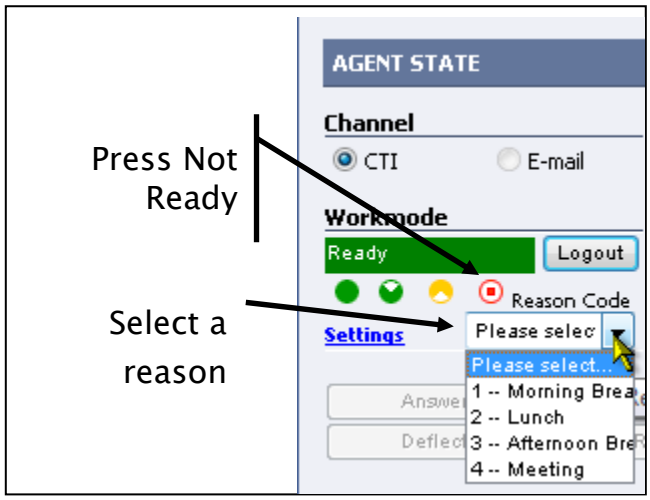
SET REASON CODE Step-by-Step

1. Set Not Ready – press the Not Ready workmode button.

Overview

Reason codes are used to track your work mode changes. If your site uses reason codes you must set a reason in order to go not ready. Figure 2-5 shows the Reason Code drop down selection box. Ask your supervisor or systems administrator for a list of valid reason codes.

Figure 2-5: Not Ready Reason



WARNING: You must select a reason code if your site uses them. If you do not: You will stay in your last work mode; your work mode will not change to not ready. Be sure Workmode shows "not ready" before leaving your desk.

Managing your contacts

This section describes how to manage contacts and calls with the Contact Controller.

Error! Reference source not found. shows the call management controls and contact information. CTI Contact (area 2) shows information about active calls. Call Controls (area 3) allow you to control calls.

This section is divided into two parts. The first part provides an overview to the functions and information in the CTI Contact and the Call Controls. The second section covers specific call handling scenarios, answering a call, placing a call on hold, etc.

Call Controls Overview

Use the Call Controls to control phone calls and perform the same call functions you would on your telephone (or softphone).

Using Call Controls you can:

- Answer an incoming call
- Place an outgoing call.
- Place calls on hold and retrieve them from hold.
- Transfer calls
- Conference calls
- Hang up calls

The Call Controls also include four special controls that simplify making calls.

- **Favorites**. Use Favorites to select a pre-entered "quick dial" number. Favorites displays both the phone number and contact name. Selecting a favorite populates the Destination box with the phone number.
- **Recent Contacts**. Use Recent Contacts to view a list of your recent contacts. Selecting a Recent Contact populates the Destination box with the phone number so you may call back a recent contact.
- **Directory**. Use the Directory to search Microsoft CRM customer records, Accounts, Contacts, Leads and Users (other agents). There are several directory search and view options that allow you quickly to find the customer record and then select one of their phone numbers. This populates the Destination box with the selected customer's number. The directory is accessed through the search button to the right of the Destination text box.
- **Destination**. Use Destination text box to enter a phone number to dial when placing a call and when transferring or conferencing a call. Selecting a recent contact or a favorite or customer record from the Directory adds the phone number into the Destination text box. You

may also enter a dial string, an unformatted string of numbers to dial: 7035551212.

The Call Controls are context sensitive: only valid action buttons will be active based on the state of the current contact phone call. Figure 2-6 shows the Call Controls layout when no calls are present. There are twelve (12) call control buttons; all are inactive but the NewCalls button.

Table 2-1: Call Control Button Use explains each button's use, when it is enabled and the call state before and after the call control is used. Table 2-2: Call State Descriptions and Actions lists the call states, their meaning and valid actions.

Figure 2-6: Call Control features

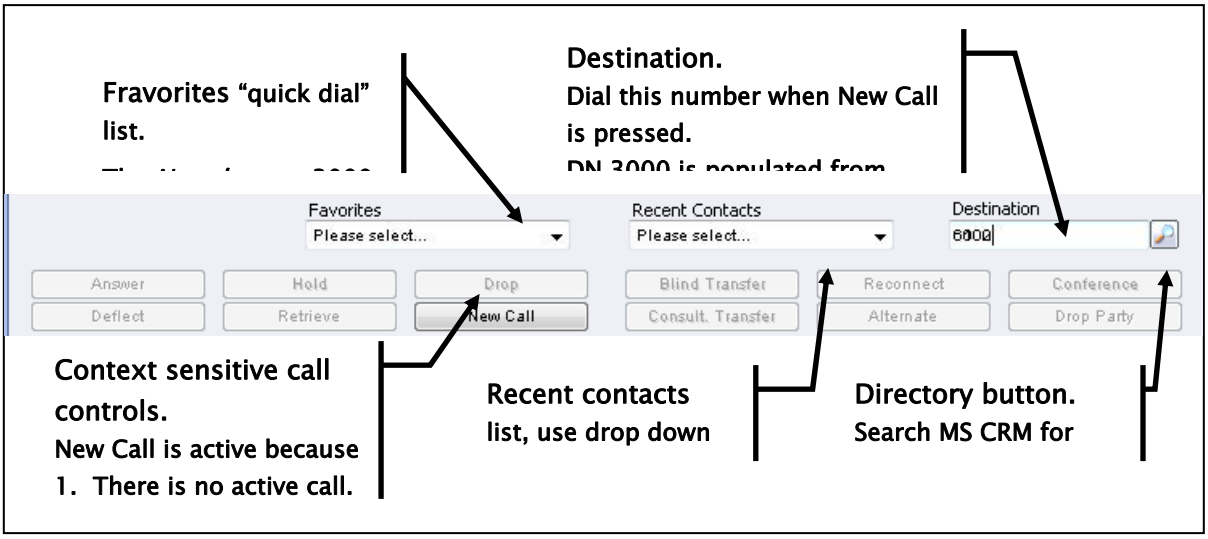


Table 2-1: Call Control Button Use

Control Name	Function Behavior and Use	Availability Call State Before / After
Answer	Answers an incoming call.	Enabled while a call rings on your phone.
	Pressing answer answers the ringing call. Warning: If you have an active call, you may need to place it on hold first. Otherwise you might hang up on the customer	Call state: ALERTING

Control Name	Function Behavior and Use	Availability Call State Before / After
Hold	Place a call on hold	Enabled when the call is active.
	Suspends call.	**Call state before:** ACTIVE **Call state after:** HOLD
Retrieve	Retrieve call from hold	Enabled when the call is on hold
	Make the active call.	**Call state before:** HOLD **Call state after:** ACTIVE
Drop	Hangs up a call	Enabled when the call is active
		Call state before: ACTIVE **Call state after:** DROPPED
New Call	Place a new outbound call.	Enabled when there is an available line **and** a phone number in the Destination box.
	Takes the phone "off hook" and places a dial. Dials may fail for a number of reason, bad phone numbers, and telephone network problems.	**Call state before: none** **Call state after:** ACTIVE
C. Transfer	Consultative Transfer – a warm transfer with a consultative call.	Active call with number in the Destination box.
	See detailed instructions on the use of consultative transfer. Initiates a consultative call to the Destination number. During consultative transfers there	**Call state before:** ACTIVE **Call state during:** HOLD, INITIATE TRANSFER **Consultative call during:** ACTIVE

Control Name	Function Behavior and Use	Availability Call State Before / After
	are two calls, therefore two call states. The customer call is on HOLD and the consultative call is the active call. When the transfer is complete, there are no calls.	**Call state after:** DROPPED **Consultative call after:** DROPPED
Conference	Conferences in another Party.	Active call with phone number in Destination box.
	Initiates a consultative call to the Destination number. The calls are then conferenced together as a second step. While conferencing there are two calls, therefore two call states. After the conference is complete there is one, merged call.	**Call state before:** ACTIVE **Call state during:** HOLD, INITIATED CONFERENCE **Consultative call during:** ACTIVE **Call state after:** CONFERENCED
Reconnect	Drop the active call and retrieve the other call from hold.	Enabled when there are two calls, one active and one on hold.
	Move from an active call to a held call. Used to abandon a transfer or	**Call one state before:** ACTIVE **Call two state before:** HOLD

Control Name	Function Behavior and Use	Availability Call State Before / After
	conference from the consultative call and resume talking with the customer. Other uses: to finish working with one customer and retrieve a second customer from hold. There are two calls and therefore two call states from the start of this function.	Call one state after: DROPPED Call two state after: ACTIVE
Alternate	Swap between two calls.	Enabled when there are two calls, one active and one on hold.
	Places the active call on hold and retrieves the held call and makes it active. Useful swapping between the customer and the other agent during a transfer or conference. As with Reconnect this can be used with any two live calls.	Call one state before: ACTIVE Call two state before: HOLD Call one state after: HOLD Call two state after: ACTIVE
Drop Party	Used to drop a party from a conference call.	An active conference call.
	Select the party to drop from the call. The party is dropped but the call continues. If there are more than three parties, the call will remain a conference call.	Call state before: ACTIVE Call state after: ACTIVE

Table 2-2: Call State Descriptions and Actions

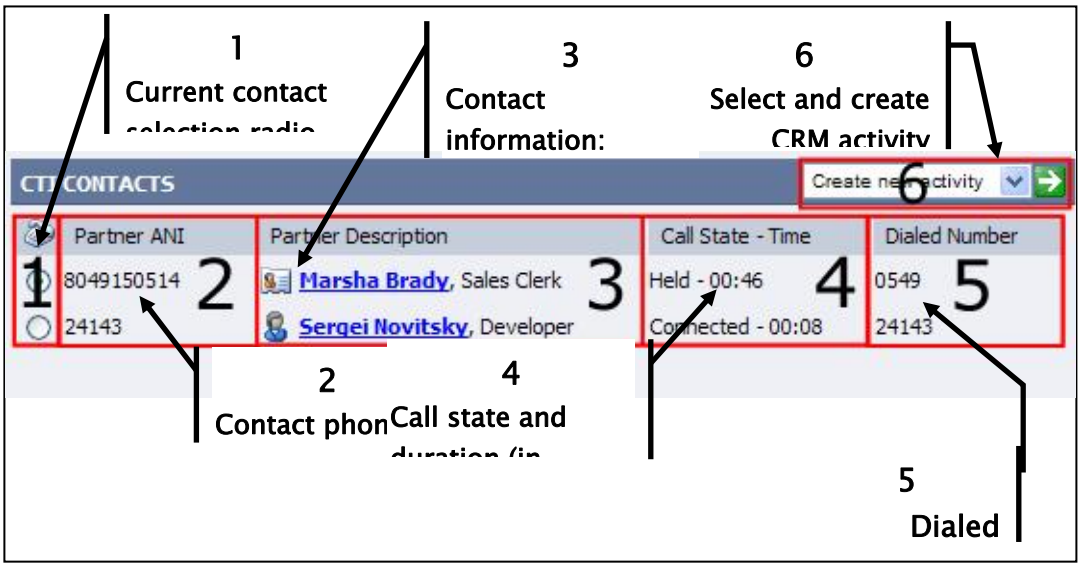
Call State	Description	Valid Actions

Call State	Description	Valid Actions
Alerting	Call is ringing on the phone.	**Answer**
Connected Active	The technical term for the active call is "connected." This is the active call. There can only be one active call at a time.	**Hold** **Drop** **Conference** **B. Transfer** **C. Transfer**
Hold	Call is on hold, suspended but still "live" and present.	If only call: **Retrieve** If other calls are present: **Reconnect** **Alternate**
Hold, initiate transfer	Call is on hold for a consultative transfer.	**Complete transfer** **Reconnect** **Alternate**
Hold, initiate conference	Call is on hold for a consultative conference.	**Complete conference** **Reconnect** **Alternate**
Dropped	Call has been dropped and the line is available.	None. Line is available for an inbound call.
Conferenced	Three or more parties are conference on a single call.	**Drop Party** **Drop (hang up)** **Conference** **Transfer**

CTI Contacts Overview

The CTI Contacts section displays information about your available calls. Use it to select a call and make it active; add MS CRM activities to the selected call, and to switch between contacts when more than one is present.

Figure 2-7: CTI Contacts Layout



What is the CTI Contacts Section?

CTI Contacts shows all available contacts along with customer information, the phone call state and time, the contact's phone number (ANI) and the number they called into (DNIS).

There is one line for each customer contact call. Most call centers have only two appearances, but there can be more with some configurations.

Use the contact section for two purposes. Its primary function is to provide an instant summary of your available contacts, who they are, how to reach them, what they are calling about and how long they have been on the call.

The second, equally important function is to select and make current one of the contacts. You will have one and only one current contact, this is the contact selected with the radio buttons

Warning: Do not confuse the current contact with the active call; although they usually are the same, they have different meanings.

Active call: The active call is in the **connected** state; you talk to the person on the active call. There can only be one active call at a time. Because all of your calls could be on hold or in other states, you will not always have an active call

Current contact: The current contact is the one acted upon through the channel controller. There must always be one current contact. Selecting a

contact with the CTI Contact radio button makes it the current contact. All channel controls and actions apply to the current contact. For example in Figure 2-7 Sergei is the active call but Marsha is the current contact. The only active phone controls would be RETRIEVE, ALTERNATE AND RECONNECT and any activity would apply to Marsha's customer record and call.

The CTI Contact Areas

There are six areas in the CTI Contact section. Four display important information; two perform actions.

Contact Selection radio buttons (1)

Use the radio button to select and make a CTI Contact the current contact when you use the channel controller. All channel controls and the activities performed in the controller apply to the current contact.

Contact Phone Number (2)

This is the number the contact is calling from. This may be referred to as the ANI (automatic number identification). It is passed into the channel controller as part of the call information from the ACD.

Contact Information (3)

This identifies the contact type and who is the contact, their name and title. This tells you whether the contact is a customer or another employee, who they are and their title. In Figure 2-7, Sergei is a user and Marsha is a contact.

The contact's name is an URL that links to the customer record in MS CRM. Clicking on the user's name URL will open the customer contact record in the Contact Data section.

When the contact is not found in MS CRM from the call information, there will be two URLs in this area: One to perform a search and a second to create a new contact.

Contact Types: There are two contact types, users and contacts or customers). Users are represented by the "head" icon ( ) and contacts are represented by a rolodex card icon ( ).

Call state and duration (4).

This tells you which call is active and the call duration.

DNIS – dialed number information service (5).

This is the phone number the customer called into. Companies often publish numbers for a specific purpose, e.g., sales or support. The DNIS can tell you **why** the customer is calling.

Create New Activity (6).

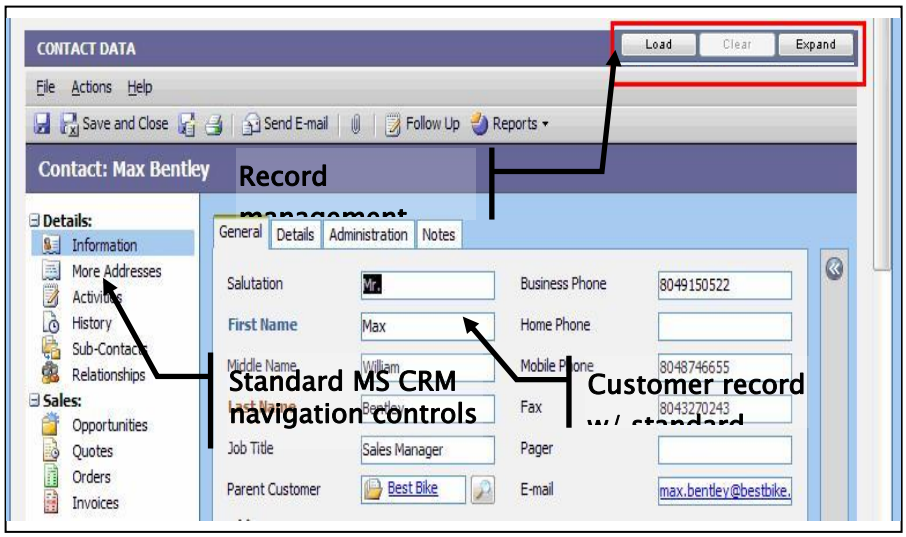
This lets you create a new activity for the current contact. The activity is associated with the customer's record and can be used to associate the phone call record with the customer in Microsoft CRM.

Contact Data Overview

Contact data is the standard customer record pane; you may navigate to any accessible Microsoft form. Work in the Contact Data section as you would any other Microsoft Windows function. There are two distinguishing differences:

- The form is CTI enabled to allow screen pop and coordinated navigation with the Call Controller functions.
- To prevent an incoming call from over-writing on-going work, there are three special contact record management buttons in the upper right corner. These are highlighted in Figure 2-8: Contact Data and described below in Figure 2-9: Record Management Controls.

Figure 2-8: Contact Data



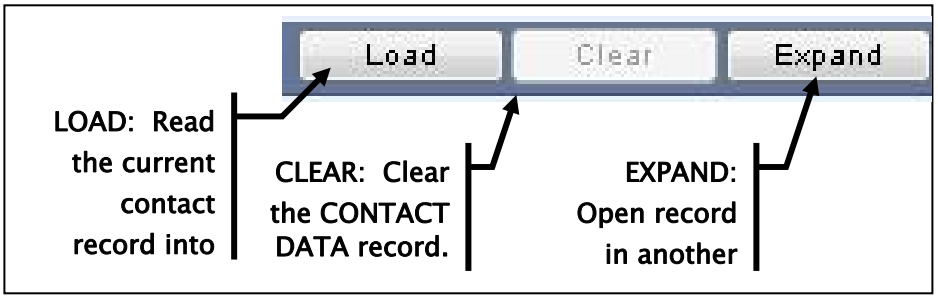
Use the contact record management buttons to control the contents of the Contact Data record. When you finish work, save it and use the CLEAR button to clear the current record contents for the next screen pop.

The load button allows you to load the current contact record information. And the expand button allows you to open a new window with the customer record.

Warning: If you navigate to work in another Microsoft CRM window you must return to the Cisco Contact Center to manage your phone call and Contact Data. Other panes cannot display the contract controls or execute a screen pop.

Note: Your supervisor may configure you for "Auto Clear." This clears your contact record when you end the contact.

Figure 2-9: Record Management Controls



Screen Pop Process

The "screen pop" is one of the major productivity features of the Cisco Contact Center. It populates the Contact Data based on call information by searching on specific call data contents, such as the customer phone number (ANI), or standard Microsoft CRM customer information: the contact, the account, the campaign or the case.

If a match is found the contact information is added to the CTI Contact line.

If the Contact Data is clear, there is no populated record, you will receive a screen pop when you answer the call.

If there is already an open record in the Contact Data, you may execute the screen pop later, by first clearing the Contact Data record and then selecting the contact and using the Load button.

If no match is found, two links are added to the CTI Contact line, a new record link and a search link. You may use these either to create a new record within the Contact Data or to open the standard Microsoft search form to search for the contact. The created or found record will be associated with the call.

3. USING THE CISCO CONTACT CENTER PANE STEP-BY-STEP

Purpose

This chapter describes step-by-step how to perform each action within the Cisco Contact Center pane. It is divided into the following parts:

- Session and Work Mode Control Step-by-Step
- Basic call control actions
- Advanced call control actions
- Working with multiple contacts
- Personalizing your contact center.

Session and Work Mode Control Step-By-Step

Where is it? The Agent State control is in the upper left corner of the Contact Controller.

What does it do? Log into and out of the ACD, controls ACD work mode.

What does it look like? Figure 3-1: Agent State (logged out) or Figure 3-2: Agent State (logged in).

Figure 3-1: Agent State (logged out)

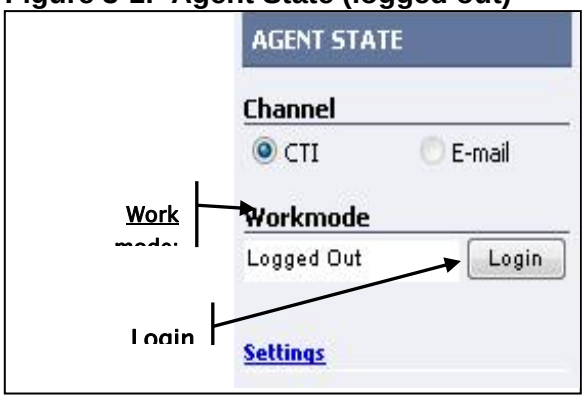
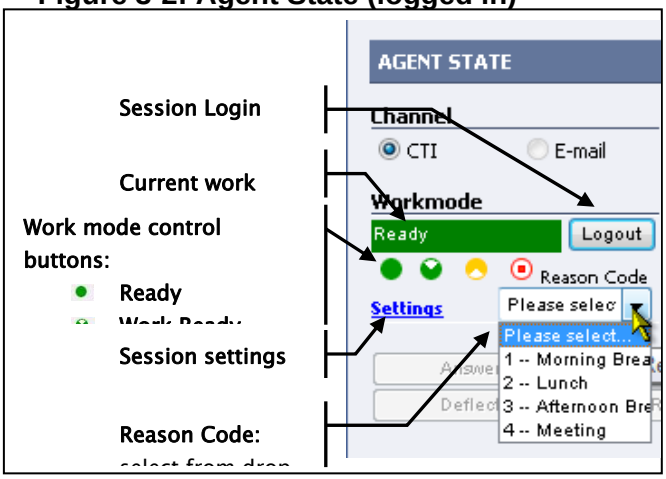


Figure 3-2: Agent State (logged in)



Log into ACD	1. Press the login button. Before you log into the ACD, check your settings to be sure you are configured for the correct user id and extension.
Log out of ACD	1. Set your work mode to Not Ready. 2. Press the logout button.
Set Ready	1. Press the Ready button: Ready means you are ready for calls and waiting for work.
Set Work Ready	1. Press the Work Ready button: Work Ready means you are ready for calls, but performing other work while waiting.
Set Work Not Ready	1. Press the Work Not Ready button: Work Not Ready means you are not ready for calls; you are doing other work.
Set Not Ready	1. Press the Not Ready button: Not Ready means you are not ready for calls and not performing other CRM work: you are on break.
Set Not Ready with Reason	1. Press the Not Ready button: 2. Select a Reason from the drop down box To update the reason code for a not ready code, select the new reason from the drop down box while not ready.
Check Session Settings	1. Click the Settings Link 2. Check settings in message box. 3. Press OK to close message box.

Handling Phone Calls Step-by-Step

Where is it? The Call Controls are at the bottom of the Contact Controller, right above Contact Data.

What does it do? Controls phone calls and has quick action drop downs for favorites and recent contacts. Call controls are context sensitive; only the valid call control action buttons are enabled.

What does it look like? The Call Control layout is shown in Figure 3-3: Call Control Layout.

Figure 3-3: Call Control Layout

Answer Call

Answer calls with the <u>Answer</u> button. This will only be enabled when calls are ringing on your phone.

There are two different answer scenarios:

- When you have no other calls present.
- When you have other calls present.

No calls present

1. In bound call will ring on phone or you will receive a "zip tone" in your headset.
2. <u>Answer</u> button will be enabled.
3. Click NewCall button to answer the call.

With calls present

1. Call will ring on the phone or you will receive a zip tone in your headset.
2. Press <u>Hold</u> to place the current call on hold.
3. <u>Answer</u> button will be enabled.
4. Press <u>Answer</u> to answer the call.

Place a call

There are several outbound call scenarios. For all you must have at least one free line. If you have an active call, end it or place it on hold.

To place a call, enter a phone number in the destination box and press NewCall.

Manual Dial

1. Enter a phone number in the **Destination** box.
4. The **NewCall** button will enable.
5. Press **NewCall** to place the call.

Favorite Dial

1. Use the **Favorite** drop down to select the favorite number.
2. This will populate the Destination box and enable NewCall.
3. Press NewCall to place the call.

Recent Contact Dial

1. Select the contact from the Recent Contact drop down.
2. This will populate the **Destination** box and enable **NewCall**.
3. Press **NewCall** to place the call.

Directory

1. Press the Directory search button: the magnifying glass icon to the right of the Destination box.
2. This opens the Directory dialog in a separate window.
3. Select the contact type you are searching from the drop down

Hang up a call

1. For active calls the Drop button is enabled.
2. Press the Drop button

Place call on hold

Hold is only enabled for active calls.

1. Press the Hold button.

Retrieve a call from hold

Retrieve is only enabled for held calls.

1. Press the Retrieve button.

Transfer & Conference calls

This section describes how to transfer and conference calls. C. Transfer and **Transfer** add a second, consultative call you must control. “Working with Consultative Calls,” describes how to work with uncompleted transfers and conferences.

Blind Transfer

1. With an active call, enter a phone number in the destination box.
2. Press **B. Transfer**.
3. This will transfer the call and drop the call

from you contacts.

Blind transfer does not involve a consultative call. The call will be transferred and dropped as soon as you press **B. Transfer**.

Consultation Transfer

There are several scenarios for consultation transfer, this describes completing the transfer. See *Working with Consultative Calls* for instructions on rejected and aborted transfers.

- The recipient accepts the transfer.
- The recipient rejects the transfer and hangs up. (See *Working with Consultative Calls*.)
- You abort the transfer and hang up. (See *Working with Consultative Calls*.)

Complete Transfer

1. With an active call, enter a phone number in the destination box.
2. Press **C. Transfer**. This places the active call on hold and places a consultative call that becomes the active call.
3. When recipient accepts the transfer, select the held contact and press **C. Transfer** to complete the transfer.
4. This will transfer the call and drop the call from your contacts.

Conference

There are several scenarios for Conference, this describes completing the conference. See *Working with Consultative Calls* for instructions on rejected and aborted conferences.

During a conference, you may drop a party. Instructions for this follow the conference step-by-step.

Complete Conference

1. With an active call, enter a phone number in the **Destination** box.
2. When the recipient accepts the conference, select the held contact and press **Conference** to complete the conference and join the calls.
3. This will consolidate the two contacts into one contact.

Drop Party

1. On a conference call, click **Drop Party**, this enables the Drop Party selection drop down – right below the Drop Party button.
2. From the drop party drop down, select the phone number of the party to drop from the conference.
3. This drops the party from the conference, but the contact call continues as the active call.

Working with consultative calls.

Consultation transfer and conference add a second, consultative call you must control. This consultative call allows you to talk with the transfer or conference recipient.

When working with a consultative call there are three scenarios:

- You may complete the transfer or conference.
- You may abort the transfer or conference.
- The recipient may refuse the transfer or conference and hang up.

Abort Transfer or Conference

1. During a C. Transfer or Conference you decide to abort the transfer, you must retrieve the original call.
2. There are two ways to abort a transfer:
   a. ***Reactivate the call.***
      i. Press **Reactivate**.
      ii. This drops the consultation call and retrieves the held contact and makes it the active contact.
   b. ***Hang up and use retrieve.***
      i. Hang up the consultative call: press **Drop.**
      ii. Select the held contact.
      iii. Press **Retrieve**.

Reject Transfer or Conference

1. During a C. Transfer or Conference, the recipient refuses the call and hangs up.
2. This drops the consultation call and leaves the original call on hold.
3. There are two ways to retrieve the held call:
   a. Select the held call and press **Retrieve.**
   b. Press **Reconnect.**

Swap Calls

Swapping alternatives between an active and a held call. It places the active call on hold and retrieves the held call to make it active.

This is especially useful when working a consultative transfer or conference, but can be used anytime you have two contacts.

Alternate Calls

1. Select the active call contact. This enables **Alternate** when two calls are present.
2. Press **Alternate**

Reconnect

When two contacts are present, this drops the active call and retrieves the held call and makes it the active call. This can be used to abort a **C. Transfer** or **Conference.**

1. Select the active call. (If both calls are on hold, retrieve the call you wish to drop from hold and make it active.)
2. Press Reconnect.

Select a favorite call

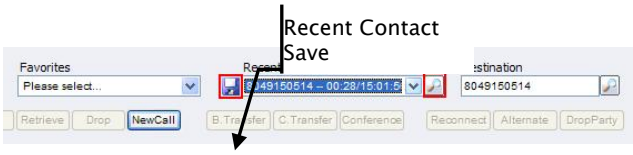
1. Use the Favorite drop down to select a contact
2. This populates the Favorite phone number in the Destination box.
3. Use NewCall, C. Transfer or Conference to call the Favorite number.

View & select recent contacts

Recent contacts shows information about your most recent contacts. It shows the contact phone number, the date and time of the call and the length of the call.

Use recent contacts to manage your recent contacts. You may:

- Call a recent contact.
- Add a recent contact to your Favorite list.
- Open the contact record in Contact Data.



Call a recent contact

1. Sel Recent Contact Upload the recent contact list drop down.
2. This adds the phone number to the **Destination** box.

Add to Favorites

1. Select a contact from the recent contact drop down.
2. This enables the "save" icon – the disk icon – to the left of the **Recent Contact** drop down.
3. Press the **Recent Contact Save** icon to add the contact to Favorites.

Open Contact

1. Select a contract from the recent contact drop down.
2. This enables the "upload" icon – the magnifying disk – to the right of the **Recent Contact** drop down.
3. Press the **Recent Contact Upload** icon to open the contact in Contact Data.

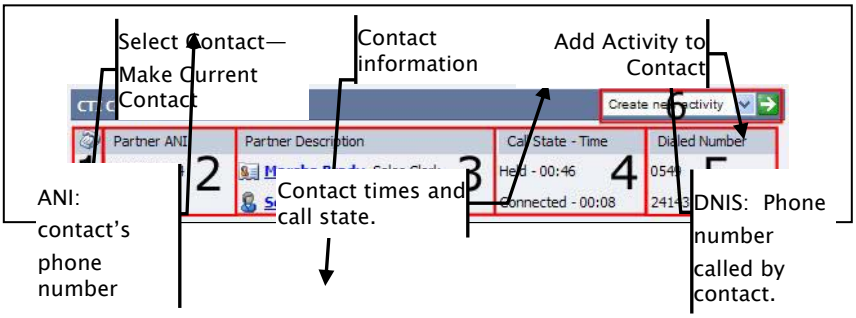
Handling Contacts Step-by-Step

Where is it? The CTI Contacts is across the top Contact Controller, to the right of the Agent State controls.

What does it do? CTI Contact shows information about present contacts and their phone calls. Use it to select a contact to make it the current contact.

What does it look like? See **Figure 3-4: CTI Contact layout**

Figure 3-4: CTI Contact layout



View Contact Information

There is one CTI Contact line for each phone call, including consultative calls. The CTI Contact line shows information about the customer contact on the call and the current phone call state:

- ANI: the contact's calling number.
- Description:
  - Contact type: "customer" or user (agent).
  - Contact link: A link to the contact record. If the contact is not identified by a screen pop or search, this will show both a search and a new contact link.
  - Contact title.
- Call state and times: shows the current call state as well as total call time.
- DNIS: Number the customer dial into; this informs **why** the customer called.

Select Current Contact

Select a contact using the radio buttons at the start of the line.

Selecting a contact makes it **the current contact.** All Call Controls and all activities and screen pop actions are associated with the current contact.

1. Select the radio button at the start of the contact line.

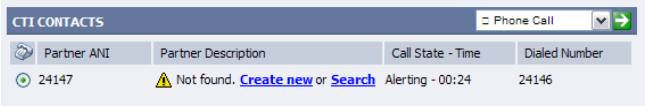
2. This becomes the **current contact.** All context sensitive call controls apply to this contact.

Receive a screen pop.

There are four (4) screen pop scenarios.

- The standard screen pop. The customer is identified from call data and there is no open record in the Contact Data.
- The customer is not identified from call data. In this case you may either:
  - Create a new contact.
  - Search for an existing contact.
- There is an open record in Contact Data.

New Contact and Search links on the CTI Contact line.



Standard Screen Pop

The standard screen pop occurs on an inbound call automatically when there is no record in the Contact Data and the customer is identified from the call data search criteria.

1. Answer the call.
2. Call data is populated into Contact Data.
3. Contact is the **current contact.**

Search for Contact

1. Answer the call.
2. Click on the search link on the CTI Contact line.
3. This opens a standard MS CRM search form.
4. User the search form to find the customer contact.
5. When the search is complete, the contact will be associated with the call.
6. Press the Load button on the Contact Data to open the contact record.

Add a New Contact

1. Answer the call.
2. Click on the create contact link on the CTI Contact line.
3. This opens a create contact record.

Clear and Load

If a record is already open in the Contact Data

Contact Data

you will need to clear the record and load the contact record. This protects you from losing work; otherwise the automatic screen pop would over-write the current Contact Data record.

1. Finish any outstanding work and save the Contact Data record.
2. Press the Clear button on the Contact Data to clear the open record.
3. Select and make the contact the current contact.
4. Press the Load button on Contact Data to open the record.

Open Contact in CRM Window

You may open up additional Microsoft CRM Windows to work with contacts. There are two scenarios for this:

- Open a window for the Contact Data – use the **Expand** button for the current open record.
- Open a window for a customer contact – use the contact name link in the CTI Contact for this.

Open Current Contact Data record

1. With a record open in Contact Data.
2. Press the **Expand** button to open the contact information into a new Microsoft CRM window.

Open Contact Record

1. Click on the contact name link in the CTI Contact line.
2. This opens another Microsoft CRM window with the customer contact information.

End Contact

End a contact by ending the call and saving and clearing the Contact Data.

1. End the call. Use hang-up or you may transfer the call to another agent.
2. Save the Contact Data record edits.
3. Press the **Clear** button to clear the Contact Data for the next screen pop.
4. If necessary, set yourself **Ready** for the next call or set change your work mode for your

next task.

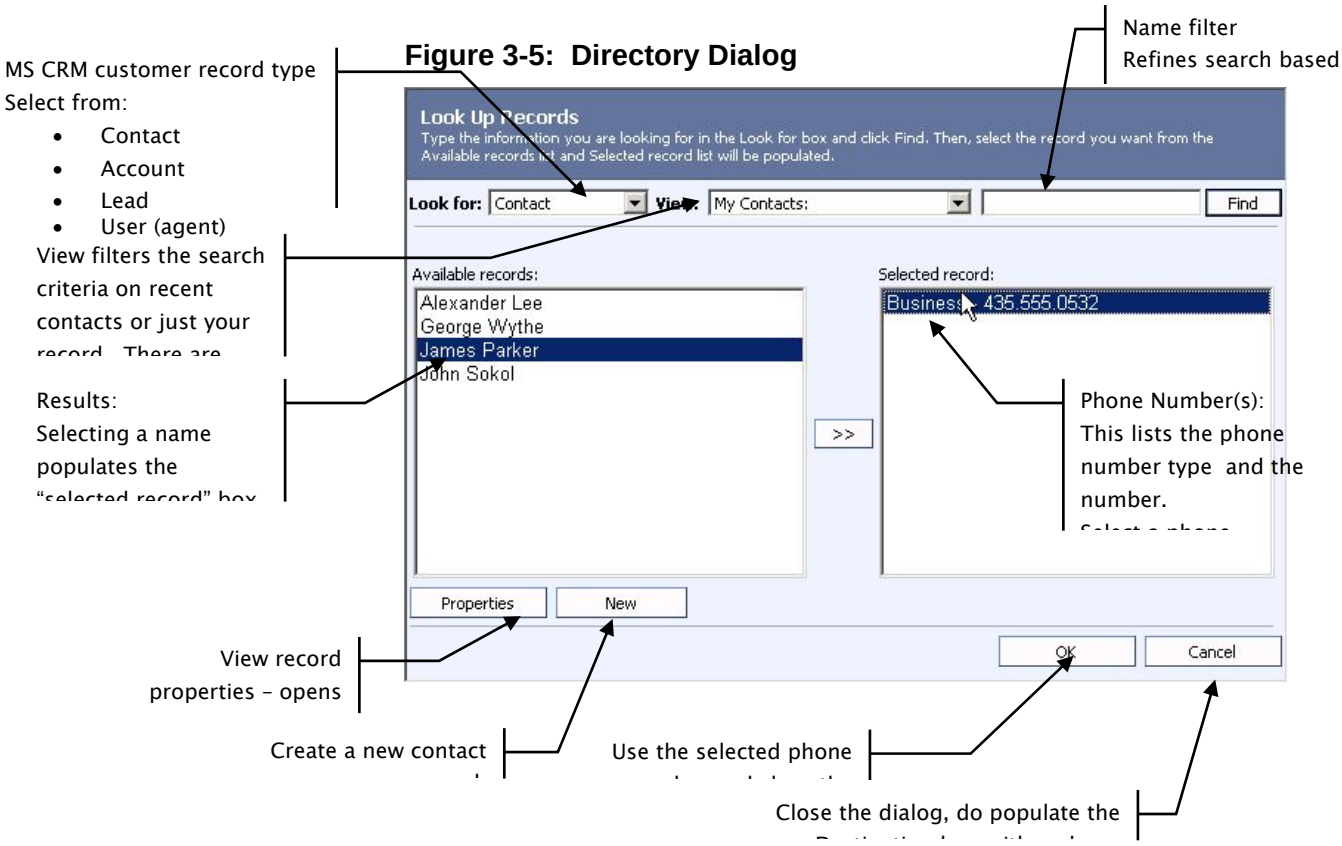
Using the Directory to Place a Call Quick View

Where is it? The Directory is a special search dialog that is opens when you click the Directory search button to the right of the Destination text box. (It is the magnifying glass icon to the right of the Destination text box.)

What does it do? Use the Directory to look up and select a phone number from the Microsoft CRM customer records. Selecting a phone number populates the destination box so you can place an outbound call. The Directory searches on Accounts, Contacts, Leads and Users (other MS CRM users, such as fellow agents).

What does it look like? Figure 3-6: Agent Settings / Personalization show how to navigate to the Agent Settings page from the Navigator.

Figure 3-5: Directory Dialog



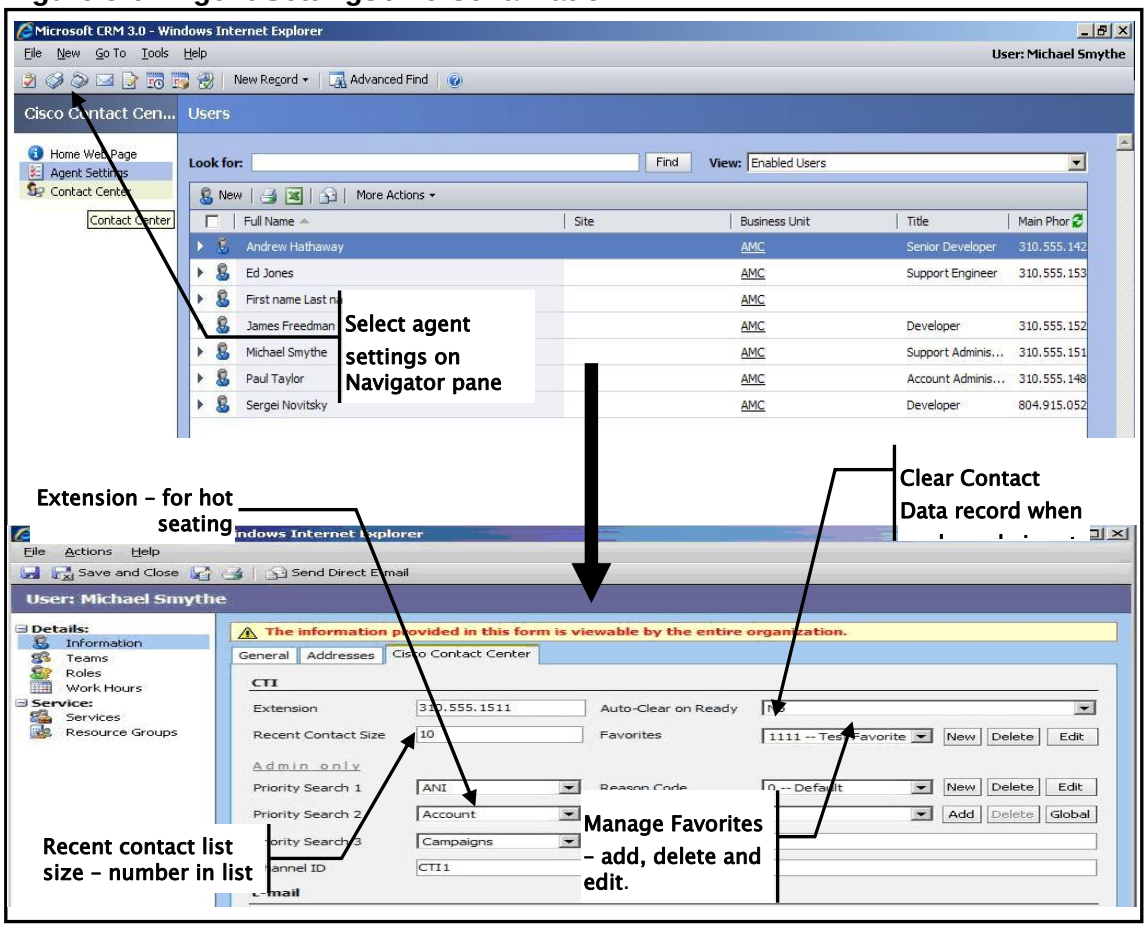
Personalize Agent Settings Step-by-Step

Where is it? Agent Settings are part of the Cisco Contact Center pane. Use the Navigator to open the Agent Settings page.

What does it do? Use Agent Settings to set your extension if your contact center uses “hot seating” or you are not sitting at your regular desk. Agent Settings also lets you set the Recent Contact list size and manage your Favorites.

What does it look like? Figure 3-6: Agent Settings / Personalization show how to navigate to the Agent Settings page from the Navigator.

Figure 3-6: Agent Settings / Personalization



Navigating to Personalizations

Navigate to the personalization page as follows:

1. Select the Contact Center pane from the Navigator Pane.
2. In the Contact Center pane, select Agent Settings.
3. Select your name from the Agent list on the Users Page.
4. On the left hand user page menu, select Information page.
5. Select the Cisco Contact Center tab.

Change Extension

Your extension and ACD login and password are pre-configured by your System Administration. If your center uses hot seating or if you need to move from your assigned desk, set the extension to match the phone at your current desk.

Use the ***Settings*** link on the Agent State control to check your extension.

1. Navigate to the User CTI information page.
2. Enter your extension in the CTI->Extension text box.
3. Save your changes.
4. Go to the Multi-Channel Center to login and work.

Set Auto-Clear

Auto-clear on Ready clears the Record in the Contact Data record when you set yourself Ready. If you activate this save any record changes before setting yourself Ready. If this is set to No manually clear the Contact Data record with the <u>Clear</u> button to receive a screen pop.

1. Navigate to the User CTI information page.
2. Use the Auto-Clear on Ready drop to set the Auto-Clear state.
3. Save your changes.
4. Go to the Multi-Channel Center to login and work.

Set Recent Contact List Size

The Recent Contact List Size setting determines the number of recent contacts available in the recent contact list. The default is ten (10) the maximum value is 9999.

1. Navigate to the User CTI information page.
2. Enter a number between 1 and 9999 to set the Recent Contact List Size.
3. Save your changes.
4. Go to the Multi-Channel Center to login and work.

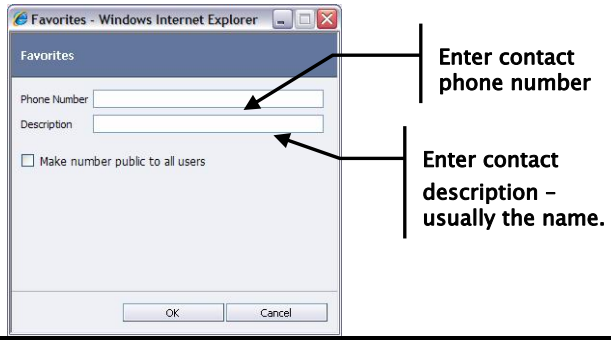
Manage Favorites

You may only manage personal Favorites; Favorites entered by your system administrator cannot be changed. There are three management function for Favorites:

- Add a new favorite
- Delete an existing personal Favorite
- Edit an existing personal Favorite.

New Favorite

1. Navigate to the User CTI information page.
2. Select New to create a new favorite.
3. Fill in the Phone Number and Description.
4. Press OK to save the new Favorite.



Delete Favorite

1. Navigate to the User CTI information
2. Select a Favorite from the Favorites drop down.
3. Press **Delete** to delete the Favorite.

Edit Favorite

1. Navigate to the User CTI information.
2. Select the Favorite to edit from the Favorites drop down.
3. Press **Edit** to edit the Favorite.
4. This opens the **Edit** dialog.
5. Change the phone number or the

description or both.

6. Press OK to close the dialog and save the edits.