IP Phone Agent Tasks

- Finesse IP Phone Agent, on page 1
- Sign In to Finesse on the IP Phone, on page 2
- Change State on the IP Phone, on page 3
- Apply Wrap-Up Reason on the IP Phone, on page 4
- Sign Out of Finesse on the IP Phone, on page 5
- Recover Finesse IP Phone Agent Service After Failure, on page 5
- Set Finesse Service and Credentials Using the Self Care Portal, on page 5
- Finesse IPPA Behavior, on page 6

Finesse IP Phone Agent

With Finesse IP Phone Agent (IPPA), you can access Finesse features on your Cisco IP Phone as an alternative to accessing Finesse through your browser. Finesse IPPA supports fewer features when compared to the Finesse desktop in the browser, but it does allow you to receive and manage Finesse calls if you lose or do not have access to a computer.

Supervisor Tasks

Finesse IPPA does not support supervisor tasks such as monitor, barge, and intercept, but supervisors can sign in and perform all agent tasks on their IP Phones.

To perform supervisor tasks for Finesse IPPA agents, supervisors must sign in to the Finesse desktop and follow the same steps that they use for the Finesse desktop agents (currently restricted to viewing team performance and changing an agent's state).

Agent Tasks

The following table provides a quick reference for common agent tasks:

Table 1: Agent Tasks

Task	Steps
Sign In	• Press **Services** > **Cisco Finesse**. • Enter your ID, password, and extension. • Press **SignIn**.

Task	Steps
Change State	Press **Ready** or **NotReady**.
Apply Wrap-Up Reasons	Press **WrapUp** and select from the list.
Enable Optional Wrap-Up	If Wrap Up is optional, press **WrapUp** during the call to move to Wrap Up state after the call ends.
Sign Out	From the Not Ready state, press **SignOut**.

For more information about agent tasks, see the following sections.

Sign In to Finesse on the IP Phone

Before you begin

Your administrator must set up your Finesse IPPA access.

Procedure

Step 1 On your IP Phone, press the **Services** button.

Figure 1: Cisco Finesse - IP Phone Services Menu

Note
The example figures shown in this procedure may differ from your phone's layout and display.

Step 2 Select **Cisco Finesse**.

Step 3 Enter your agent ID, password, and extension, and press **SignIn**.

Figure 2: Cisco Finesse - Sign In

Note

- You must enter your agent ID in the ID field. Unlike the Finesse desktop, Finesse IPPA does not support username for sign in.

Note Your administrator can set up your phone with One Button Sign In, which allows you to sign in without specifying your ID, password, or extension. In this case, when you select Finesse from the Services menu, Finesse IPPA automatically enters your sign-in information, and you move directly to the home screen. Finesse IPPA One Button log in can also be configured by the Administrator with only some of the parameters like ID and Extension. In this case, you must enter only your password to sign in.

When signing out from the Finesse IPPA application, the Sign In page is displayed. Click on the **Exit** button to ensure that Single-Sign On works correctly the next time you log in to the Cisco Finesse application.

Change State on the IP Phone

When you sign in to Finesse on the IP Phone, your initial state is set to Not Ready. To receive calls, set your state to Ready.

While you are on a call, you can set the state that will apply when the call is complete. In this case, Finesse shows your current state and the pending state that Finesse applies after the call ends.

Procedure

Step 1 To set your state to Ready, press the **Ready** button.

Step 2 To set your state to Not Ready, press the **NotReady** button.

Step 3 If Not Ready reason codes appear, scroll to the desired reason, and press the **Select** button.

To change your selected reason code, press the **NotReady** button again and select a different reason.

Apply Wrap-Up Reason on the IP Phone

A Wrap-Up reason indicates why a customer called the contact center. For example, you can have one Wrap-Up reason for sales calls and another for support calls.

Your administrator can assign Wrap-Up reasons to you. In this case, the WrapUp button appears when you are on a call or while you are in Wrap-Up state after the call ends.

Note When you are on a call (talking state), the WrapUp button is displayed with the Ready and Not Ready buttons. You can select the WrapUp reason before ending the call.

If you do not select the Wrap-Up reason before ending the call, and if Wrap-Up reason is configured for you by the administrator, then WrapUp button is displayed after you end the call. You can now select the Wrap-Up reason.

If the administrator has not configured Wrap-Up reasons for you, the WrapUp button is not displayed.

Your administrator can set Wrap-Up as a required or optional step. If Wrap-Up is required, you move to the Wrap-Up state automatically after the call ends to complete any after call work. If Wrap-Up is optional, press WrapUp during the call to move to the Wrap-Up state after the call ends.

Procedure

Step 1 If Wrap-Up is required, press **WrapUp** during or after the call and select a Wrap Up reason from the list.

Step 2 If Wrap-Up is optional, press **WrapUp** during the call and:

- Select **Wrap Up After Call**, and select a Wrap-Up reason after the call ends.
- Select **Apply Wrap Up Reason**, and select a Wrap-Up reason during the call.

Step 3 To end the Wrap-Up state after the call ends, select your new state (Ready or NotReady) or wait for the preconfigured timer to expire.

While you are on a call, you can specify the next state to apply after Wrap-Up by selecting that state first. For example, while on a call, select **NotReady** and then select **WrapUp**. When the call ends, you enter the Wrap-Up state with a pending state of Not Ready. When the Wrap-Up timer expires, you enter the Not Ready state.

You cannot enter a Wrap-Up reason after you transfer a call. To enter a Wrap-Up reason for a call you transfer, select the Wrap-Up reason while the call is in progress.

Sign Out of Finesse on the IP Phone

Before you begin

You must be in the Not Ready state to sign out.

Procedure

Step 1 Press the **SignOut** button.

Step 2 If Sign Out reason codes appear, select the desired Sign Out reason, and press the **Select** button.

Recover Finesse IP Phone Agent Service After Failure

If the Finesse server you are currently signed in to goes out of service, the IP Phone displays an error indicating the Finesse service is unavailable. Unlike the Finesse desktop, the Finesse IP Phone Agent does not automatically failover to the alternate Finesse server. To resume general operations, exit from the current Finesse IP Phone service and manually sign in to an alternate Finesse IP Phone service.

Procedure

Step 1 Press **Retry** to retry the current Finesse service.

Step 2 If the issue is not resolved, sign in to an alternate Finesse service:

a) Press **Exit** to exit the current Finesse service.
b) Press the **Services** button.
c) Select an alternate **Cisco Finesse** service from the menu.
d) Enter your agent ID, password, and extension, and press the **SignIn** button.

Note

- If none of the available Finesse services allow you to connect, contact your administrator.
- If your IP Phone displays pending state information when you lose connection with the Finesse service, that state information is lost when you sign in again.

Set Finesse Service and Credentials Using the Self Care Portal

Your administrator may ask you to subscribe your phone to the Finesse service using the Unified CM Self Care Portal. If your administrator sets up One Button Sign In, they may also ask you to enter your ID, extension,

or password in the Unified CM Self Care Portal. (Finesse IPPA can then enter these credentials for you automatically each time you sign in.)

Procedure

Step 1 Use your ID and password to sign in to the Self Care Portal from the following URL:

http://*UCM address*/ucmuser

Where *UCM address* is the address of Cisco Unified CM provided by your administrator.

Step 2 On the Self Care Portal, navigate to **Phones** > **Phone Settings** > **Services**.

Step 3 Select the phone that you want to subscribe to the Finesse service.

Step 4 If your administrator has already subscribed this phone to the Finesse service, click the **Edit Service** icon for the Finesse service, and go to Step 7. Else, go to Step 5.

Step 5 Click **Add New Service** for the phone and select the Finesse service from the drop-down.

Step 6 In the Display Name field, enter **`Cisco Finesse`** (or another display name that is appropriate for your phone).

Step 7 If your administrator requests that you enter your credentials, enter the required values for your agent id, password, and extension.

Step 8 Click **Save**.

What to do next

If your administrator has also set up a secondary Finesse service as a backup, perform these steps again on the secondary service.

Finesse IPPA Behavior

The following notes describe how Finesse IPPA behaves when you perform certain agent tasks.

Call Data Display

- When you make or receive a call, Finesse IPPA displays call data on the phone based on the administrator-defined layout. Unlike the Finesse desktop, Finesse IPPA displays all call data in one column. The display order relative to the Finesse desktop is: header, left column, right column. You can scroll to view the data as required.
- When you are on multiple calls (such as a consult call), Finesse IPPA displays call data for the active call. If all calls are on hold, Finesse IPPA displays call data for the last active call.
- Some IP Phone models display the Finesse IPPA screen and not the home screen during an ACD incoming call. You cannot accept the call as the **Answer** and **Decline** soft keys are not enabled in the Finesse IPPA screen. To answer the call:
  - Press the hard key on the top right of the IP Phone.
  - Use the phone handset.
  - Press the speaker button.

- You cannot end an active call as the **End** soft key is not enabled in the Finesse IPPA screen. To end a call:
  - Press **End** button on the IP Phone.
  - Press the speaker button.

Phone Behavior When You Make a Call

- If you make a call without first navigating to the home phone screen, sometimes the IP Phone changes the display to the Finesse screen. To view the dialed numbers, navigate back to the home phone screen.
- If you call a busy number, the IP Phone first displays a `Busy` message, and then Finesse displays a `Talking` message until you end the call. You can safely ignore the `Talking` message.

Reserved and Hold State Not Displayed

- Unlike the Finesse desktop, Finesse IPPA does not display Reserved or Hold states. Instead, Finesse IPPA continues to display the previous state that applied (for example, Ready or Talking) before you moved to reserved or on hold.

No Wrap Up on Transferred Calls

- If you transfer a call, you cannot set any Wrap Up data for the call even if Finesse IPPA shows you in the Wrap Up state. To enter a Wrap Up reason for a transferred call, select the Wrap Up reason while the call is in progress.

Additional Finesse IPPA Behavior

- The Simplified New Call UI is currently not supported in Finesse IPPA. Enabling this feature will not allow the agent to make outbound calls in READY state.
- Finesse IPPA is not supported on VPN.
- When Finesse IPPA phone is powered off or reset, you will be logged out of the physical device.