



Call-Related Tasks

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Change Your State

When you sign in to the Finesse desktop, your state is set to Not Ready by default. You can then set your state to Ready or choose from one of the configured Not Ready reason codes.

If you are in Ready state, you can set your state to Not Ready. While you are on a call, you can select a state to be applied when the call is complete.

If wrap-up state is enabled for you, when a call ends, you transition to Wrap-Up state. While in Wrap-Up state, you can complete any after call work. To end Wrap-Up state, you must select your new state (Ready or Not Ready) from the drop-down list or wait for the preconfigured timer to expire.

Procedure

Step 1 Click the drop-down arrow beside your current state.

Step 2 Select the appropriate state from the list.

Your agent state changes to reflect your choice. If you are on a call and select a state, Finesse shows your current state and the pending state to which you will transition when the call ends.

Make a Call

Your status must be set to Not Ready to make an outgoing call.



Note Finesse now supports the use of any ASCII character when you make a call. Finesse no longer converts letters typed into the dial pad into numbers, nor does it remove non-numeric characters (including parentheses and hyphens) from phone numbers.

Procedure

Step 1 Ensure your status is set to Not Ready (or Not Ready with the appropriate reason code).

Step 2 Click **Make a New Call**.

The panel expands to reveal the keypad and a list of phone contacts. Your administrator assigns phone contacts to you.

Step 3 Choose the contact from the list or enter the number you want to call into the dial pad.

Note Enter text in the search field to search the list of contacts. Select a contact to populate the dial pad with the phone number.

Step 4 Click **Call**.



Step 5 To end the call, click **End**.

Answer a Call

You must be in Ready state to be available for customer calls. When a call arrives at the desktop, your state automatically changes to Reserved. The call control area expands to show the call variables configured for your system.



Note Depending on how your administrator has configured the system, you might see different call variables layouts for different calls.



Note You can receive a call from another agent while you are in Not Ready state.

Procedure

- Step 1** Click **Answer**.
Your state changes to Talking. You are connected to the caller.
- Step 2** To end the call, click **End**.
Your state changes to Ready and you are available for the next incoming call.
If you want to be in Not Ready state when the call ends, you can click the drop-down arrow beside your state while you are on the call. You can choose Not Ready or Not Ready with the appropriate reason code. Your state changes to Talking->Not Ready (Pending). When the call ends, your state changes to Not Ready.
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Answer a Direct Preview Outbound Call

A Direct Preview Outbound call allows you to view a customer's contact information before you choose to accept or decline the call.

Procedure

- Step 1** Ensure your state is set to Ready. You must be in Ready state to receive a call.
When a Direct Preview Outbound call arrives at the desktop, your state changes to Reserved (Outbound). The Call Control gadget expands to show customer information.
- Step 2** After you review the information, click **Accept** to accept the call or click **Decline** to decline the call.
If you accept the call, the system places the call to the customer directly from your phone.
If the attempt succeeds, you are connected to the customer. If the attempt fails, Finesse places you in Ready state.
If you decline the call, you must choose whether to reject or close the contact. If you click **Reject**, the contact remains in the campaign to be retried at a later time. If you click **Close**, the contact is closed for the duration of the campaign.
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Reclassify a Direct Preview Outbound Call

The Reclassify button allows you to reclassify a Direct Preview Outbound call as Busy, Answering Machine, Fax, Invalid Number, or Voice. By default, a call is classified as Voice. This button is available after you accept the Direct Preview call and for the life of the call and while you are in the wrap-up state. You can reclassify a call multiple times.

Procedure

- Step 1** Answer a Direct Preview Outbound call.
 - Step 2** Listen to the call. If you determine the number called is busy, an answering machine, a fax, or an invalid number, click **Reclassify**.
 - Step 3** Choose the appropriate option from the resulting drop-down list.
The icon on the Reclassify button changes to the icon for the selected option.
 - Step 4** To end the call, click **End**.
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Schedule a Callback

If you are on an Outbound Dialer call and the customer wants to be called back at a later time, you can schedule a callback.

Procedure

- Step 1** While you are on the call, click **Callback**.
The Callback dialog box appears. The Current Time field contains the current time in the customer's time zone (this field is read-only).
- Step 2** If the customer prefers to be called back at a different phone number, enter the new phone number in the Phone Number field.
- Step 3** In the Date and Time field, enter the date and time to call the customer. You can type the date and time in to the field or click the calendar icon to choose the date and time.
You must enter the time in the customer's location (not the time in your location).
To toggle between AM and PM, click the AM or PM button.
Note The time corresponds to the customer's time zone. Finesse uses the customer's area code to determine the time zone. A customer using a mobile phone may not be in the time zone that matches the area code of the phone. Therefore, you should confirm the time zone with the customer.
- Step 4** Click **Schedule**.
A pop-up appears that confirms the callback has been scheduled.

- Step 5** If you need to update the information after you schedule a callback, click **Callback** to re-open the Callback dialog box.
- Step 6** Update the necessary fields and then click **Update**.
A dialog appears that confirms the callback has been updated.
- Step 7** If you need to cancel the callback after you schedule it, click **Callback** to re-open the Callback dialog box.
- Step 8** Click **Cancel**.
A pop-up appears that confirms the callback has been canceled.

Initiate a Consult Call

You must be on an active call to initiate a consult call.

Procedure

- Step 1** Click **Consult**.
The call control area expands to reveal the keypad and a list of contacts.
- Step 2** Choose the contact you want to consult from the list of contacts or enter the number into the keypad.
- Step 3** On the keypad, click **Call**.
The customer call is placed on hold. You are connected to the contact that you called.
- Step 4** After you consult with the contact that you called, you can choose to end the consult call and retrieve the customer call, conference the customer into the consult call, or transfer the customer to the agent or supervisor that you consulted.

Option	Description
To end the consult call and retrieve the customer call	Click End on the consult call and then click Retrieve on the customer call.
To place the other agent or supervisor on hold and go back to the customer	Click Retrieve on the customer call. Click Retrieve on the consult call to place the customer on hold and go back to the other agent or supervisor.
To conference the customer into the consult call	Click Conference . If you want to leave the conference, click End .
To transfer the customer to the agent or supervisor you are consulting with	Click Transfer .

Send DTMF

Use the Send DTMF feature to send a string of dual-tone multifrequency (DTMF) digits during a call. For example, you can use this feature to interact with an interactive voice response (IVR) system to enter an account number or a password.



Note You must be on an active call to use this feature.

Procedure

Step 1 Click the **Keypad** button.

The call control area expands to reveal the keypad.

Step 2 Click the appropriate buttons on the keypad to enter the DTMF digits.

You can send the following characters as part of a DTMF string:

- 0-9
- pound sign (#)
- asterisk (*)

Note You must use the keypad to enter the digits. You cannot type the digits using your keyboard.

The corresponding characters appear in the text field above the keypad (this text field is read-only).

Step 3 Click the **Keypad** button again to close the keypad.

Apply Wrap-Up Reason

Wrap-up reasons represent reasons that you can apply to calls. If your administrator has assigned wrap-up reasons to you, the Wrap-Up Reason button appears when you are on a call or when you are in Wrap-Up state after a call (if you are configured for wrap-up).

Wrap-up reasons can be applied on all Inbound calls routed to the Contact Center and on all the Contact Center triggered outbound campaign calls only.

If you do not have any wrap-up reasons assigned to you, you will not have this feature on your desktop. Your administrator creates and assigns wrap-up reasons.

To end Wrap-Up state, you can select your new state (Ready or Not Ready) from the drop-down list or wait for the preconfigured timer to expire.



Note You cannot enter a wrap-up reason after you transfer a call. If you want to enter a wrap-up reason for a call you transfer, you must select the wrap-up reason while the call is in progress.

If you are configured for wrap-up, you may enter Wrap-Up state after you transfer a call. However, the timer on the desktop does not display the wrap-up time.

Procedure

- Step 1** Click **Wrap-Up Reason**.
- Step 2** Select the appropriate wrap-up reason from the drop-down list.
- Step 3** Click **Apply**.

A green check mark appears next to the Apply button to indicate that Finesse successfully applied the wrap-up reason.

Note You can change the wrap-up reason during the call. If you decide you want to use a different wrap-up reason, click the **Wrap-Up Reason** button again, select a new wrap-up reason, and click **Apply**.
