

Farlon Agent Desktop

for Cisco UCC



Welcome

Farlon Agent Desktop is a unique switchboard application solution build on Cisco UCC Contact Center technology.

It's easy to use, navigate and customize.

This Users Guide introduces the essential functions such as handling an incoming call, making a transfer and searching for information.

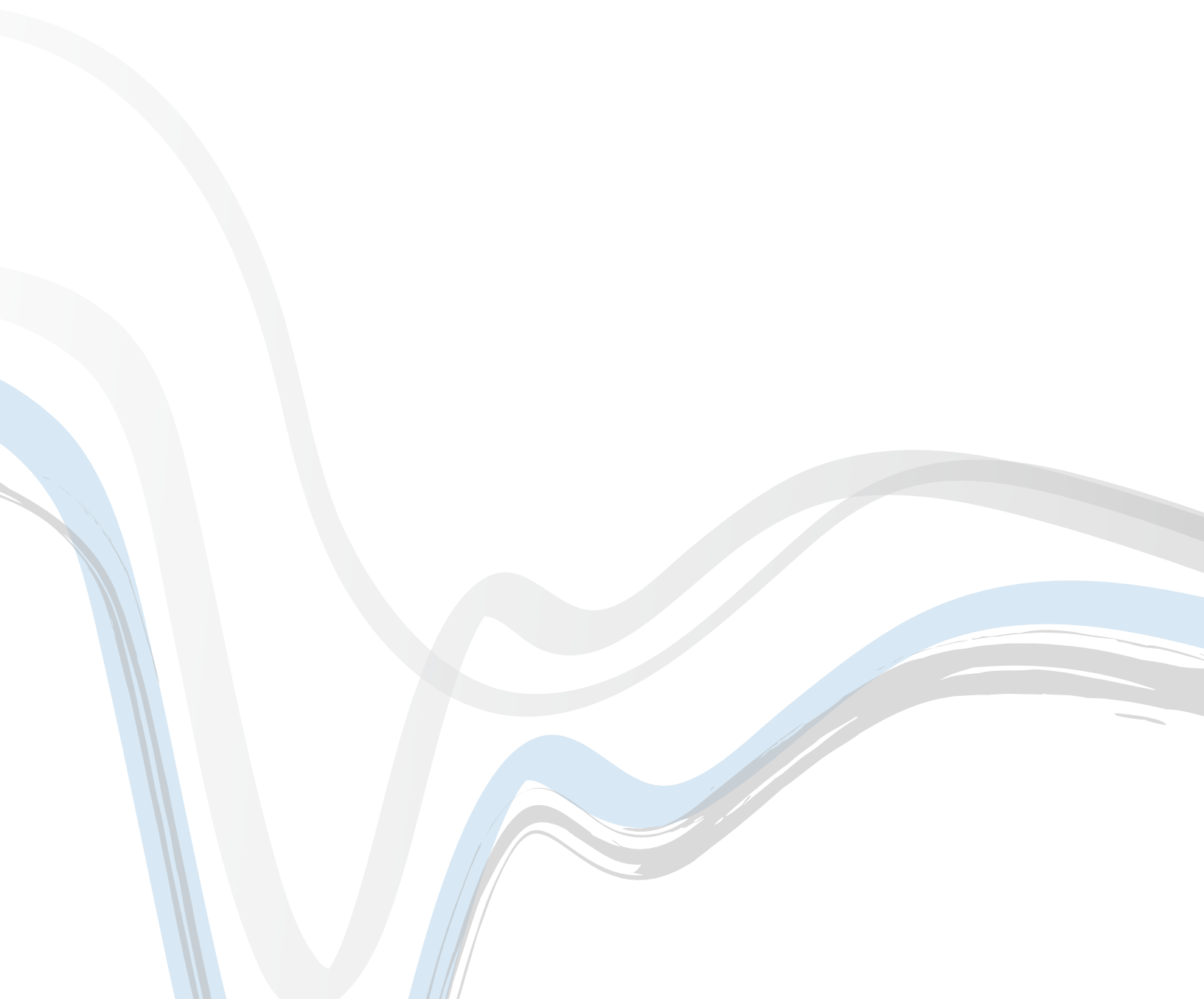
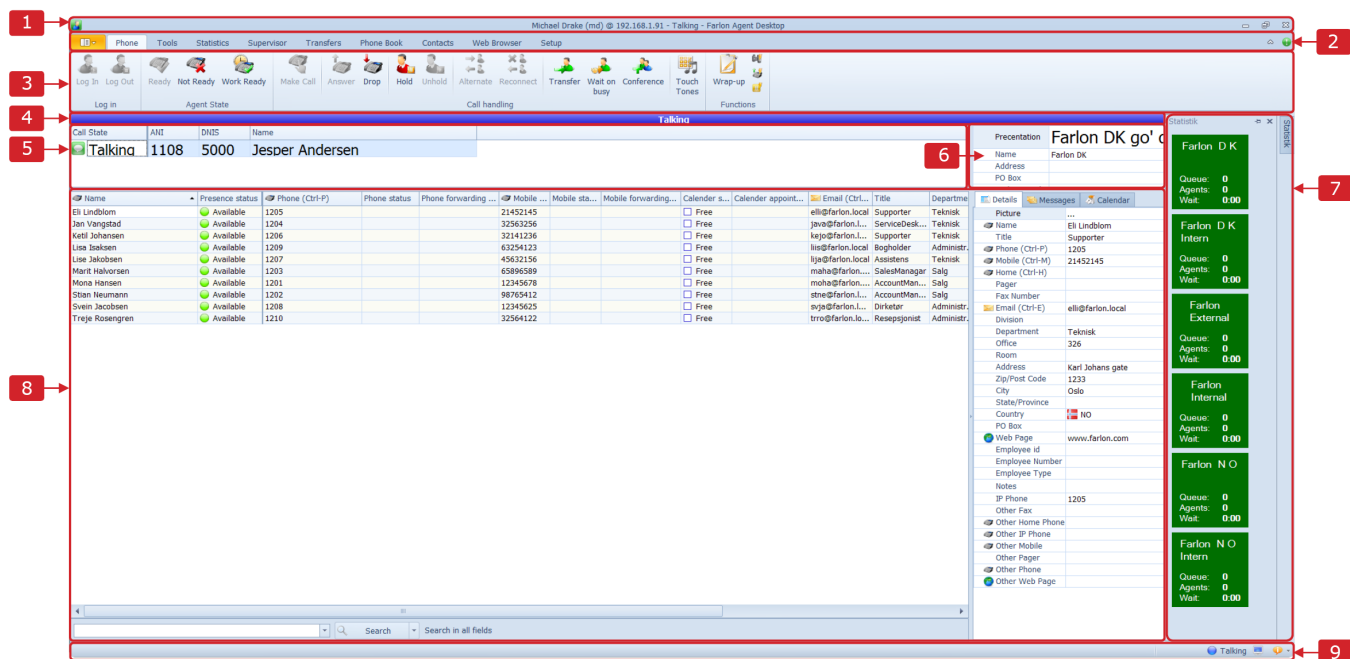


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User Interface



Farlon Agent Desktop is organized into the following sections:

- 1 **Title Bar** shows your name, agent ID, the switch you are connected to and your current agent status.
- 2 **Tab Menu** is arranged by function and contains following tabs: Phone, Tools, Statistics, Transfers, Phone Book, Contacts, Web Browser and Setup.
- 3 **Button Panel** is organized into groups that consist of function-related buttons. Hover the mouse cursor over a button to bring up an information text box describing the button's function and shortcut.
- 4 **Agent State Line** displays a colour indicating agent's current state. Red indicates Not Ready, yellow indicates Reserved or Work, Ready, green indicates Ready and blue indicates Talking.
- 5 **Call List** displays the calls you are currently managing. You can manage up to two calls at the same time. This line includes all information about the calls.
- 6 **Presentation Window** shows presentation text for the call being answered.
- 7 **Queue Barometer** shows skill-based statistics for your groups. Each skill group is measured on calls in queue, agents ready and longest wait time for a call. The system will inform you if you are the last agent leaving the group.
- 8 **Data Area's** content depends on the tab being used:
 - ♦ **Statistics tab:** Detailed queue statistics about current call handling situation.
 - ♦ **Transfers tab:** Queue list for transferring a call to the queue which is leading the skill group.
 - ♦ **Phone Book tab:** Employee database with calendar status, telephone and mobile numbers, email addresses, etc.
 - ♦ **Contacts tab:** List of external contacts.
 - ♦ **Web Browser tab:** Customized internet web pages and integrated IT systems.
- 9 **Status Bar** is divided into several zones that show: Status Text, Auto Function Icons, Agent State Lamps, Connection Mode and Skill Group Alarm Icons.

Getting Started

Start



Right-click on the Farlon Agent Desktop icon on your desktop.

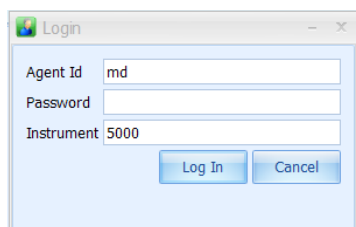
Log In



You must log in to answer a call. Select log in icon in the Phone tab or use the shortcut



Login Window



The Login window will appear. Logging in will tell the system and your colleagues that you are available.

Agent ID, Password and Instrument number will be provided by your system administrator.

Ready



You must log in to answer a call. Select the Login icon in the Phone tab or use the shortcut



The system will automatically send you an inbound call when your status is set to Ready.

4

Not Ready



Select the Not Ready button in the Phone tab or use the shortcut F4 to change your status to Not Ready.



5

Change your status to Not Ready:

- ◆ *Before you make a call*
- ◆ *When you take a break*

The system will automatically change your status to Not Ready if you fail to answer a call in the allotted time. The missed call will automatically be forwarded to the next available employee.

Log Out

6



Select the log out button on the Phone tab or use the keyboard shortcut



You must log out in order to exit Farlon Agent Desktop.

Managing an Incoming Call

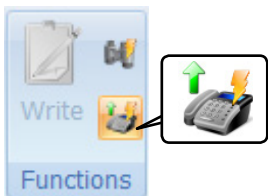
Answer a Call



Your agent status bar becomes yellow and your agent status becomes Reserved when your phone rings. Select the Answer button in the Phone tab or use one of the following keyboard shortcuts to answer an inbound call.



Auto Answer



Auto Answer tells the system to answer calls automatically. Select Auto Answer in the Phone tab or use the keyboard shortcut



Ending an Active Call



Select the Drop button in the Phone tab or use one of following shortcuts to end the call



1

Handling a Phone During a Call

Farlon Agent Desktop can be fully operated via a standard Windows keyboard.



See the Farlon Agent Desktop Quick Reference Guide for more details and options.

Call List

Call State	ANI	DNIS	Queue	Application	History	Duration	Name
Talking	5001	9000	Service	Administration			...Angela Reed

Your agent status bar becomes blue and your agent status becomes Talking as soon as you answer a call.

The Call List displays all information regarding the caller.

You can always use this shortcut to activate Farlon Agent Desktop when it is minimized.



Handling a Call

*You can choose between following options:
Solve a callers request yourself using:*

- ◆ Build-in Web Browser
- ◆ Integrated IT systems
- ◆ External IT systems

Transfer a Call to:

- ◆ A specific employee
- ◆ An external contact
- ◆ A skill based group's queue

2

3

Search Procedures

for Transfers, Phone Book and Contacts tabs

Wildcard Search

Character	Description	Example	Search result
*	Match one or more characters	pe*	Finds all words starting with pe like Peter, Pedro or Penelope

Wildcard characters can be placed before, inside, or after a keyword.

Or Search

Character	Description	Example	Search result
&	OR operator	john &jane	Finds all results containing John or Jane

Separate keywords with a space for a combined search. For example, when you enter “John Doe” the search results will contain both keywords.

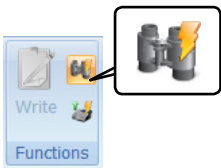
Phonetic Search

Phonetic search means you can enter a keyword the way it is pronounced. For example, a search for Petersen will generate search results including all phonetic variants of this name: Pedersen, Peterson, Petterson and of course Petersen.

To disable phonetic search, append an exclamation mark ! before the search word. For example, if you enter !peter, search results will only result in exact matches and will not include variations of the name.

Phonetic search will not be performed on a keyword with less than 4 characters or in combination with the wildcard character *.

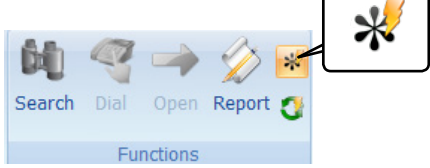
Auto Search



When Auto Search is enabled, the system will automatically jump to a search box in the Phone Book tab when you answer a call. Select Auto Search in the Phone tab or use the shortcut



Auto Asterisk



When Auto Asterisk is activated the system will automatically append a wildcard character * to each search word. Enable Auto Asterisk in the Phone Book tab or use the shortcut



Auto Asterisk is also available in the Transfers and Contacts tabs.

When an Auto Function is enabled its icon appears on the panel at the bottom right corner of the screen (on the Status Bar).

Phone Book's Advanced Search

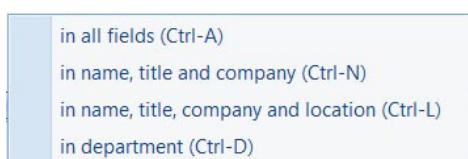
Narrow Down Phone Book Search Results

Farlon Agent Desktop is standardized to search in all information fields. The Narrow Down function allows you to predefine search criteria, useful if you get too many search results.



1

Go to Phone Book tab and then select Search button or use the shortcut



2

Select the relevant search criteria

Or use the keyboard shortcuts

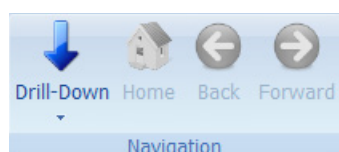


*Shortcuts become enabled when you enter a search word.
Press F12 each time before using these keyboard shortcuts.*

Drill-Down Search in the Phone Book tab

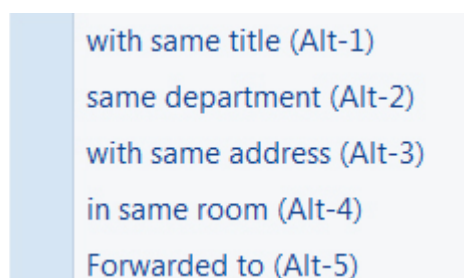


Use the Drill-Down function to find another employee connected to the original employee you looked up



1

Select Drill-Down button in the Phone Book tab



2

Select Drill-Down search criteria

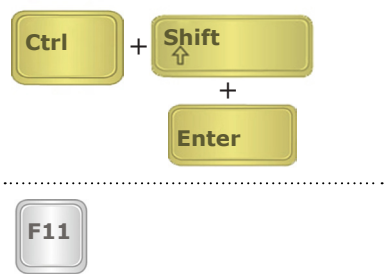
Or use the keyboard shortcuts



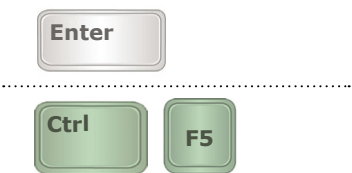
Phone Book's Transfer Options

Highlight the employee field and use one of the following transfer options:

Consulted transfer

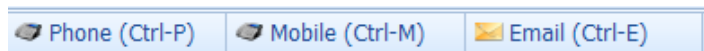


Direct transfer via Wait on Busy



If the desired employee is busy, you can transfer a caller directly via the Wait on Busy function. The system will place the active call on hold and transfer it to the relevant employee when he/she is no longer busy. If the recipient does not answer then the call will be re-turned to the switchboard or to the relevant queue.

Column Action Shortcuts



The column headings (above) have attached action shortcuts. You can make a consulted transfer or send an E-mail using the action shortcuts.



Highlight an employee field then use the action shortcuts.

Phone Book's Additional Tabs

Details tab



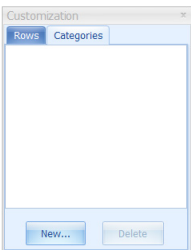
All available information about the highlighted person is displayed on the right side of the application window.

Customize the data in the Details tab by right-clicking on the data area and selecting the Column Chooser. The customization window will appear.

Highlight the desired information field in the customization window, then drag and drop it into Details tab's data area.

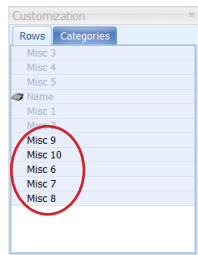
Customization Window

Categories



You can create categories in the Categories tab to divide information fields.

Rows



There are five editable data fields that you can add to the Details tab. Changes will be immediately updated in the database and added as search criteria.

Messages tab



Highlight an employee then select New Message button in the Phone Book or use the shortcut



The predefined template collects all available phone data and creates a standard message. You can also add additional text to the message. Press the Text button to preview the complete message.

You can choose between following message templates:

- ♦ Email message
- ♦ SMS message
- ♦ SMS phone message*
- ♦ Phone message*

*Only available when you have an active call.

Calendar tab

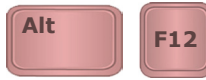


The Calendar tab shows the highlighted employee's schedule. The Calendar tab has several preview modes: schedule for a day, a work week, a week and a month.

Farlon Agent Desktop collects calendar information from your company's calendar system. (Exchanges and Notes).

Contacts tab

Select the Contacts tab or use the shortcut



The search procedure is the same as in the Phone Book tab except now the system is searching the External Contacts database.

Transfer tab

Select the Transfers tab or use the shortcut



Searching procedure is the same as in the Phone Book. The only difference is that the system is searching in external contacts database.

Press numerical star to show all queues



Transfer to a Queue

Highlight a queue field in the data area and select the Transfer button in the Transfer tab.



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