# Alcatel-Lucent OmniTouch Contact Center - Standard Edition

# Agent on deskphone with small display and 6 softkeys Phone Guide R10.x



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## Chapter

1

## About this document

This user guide is intended for Contact Center agents using the following deskphones as Pro-ACD phones sets:

- 8008/8008G/8018 DeskPhones
- 8019s DeskPhone
- 8028s Premium DeskPhone
- 8029 Premium DeskPhone

All the Contact Center features described in this guide apply to agents:

- Logged on to handle calls routed via the Call Center Distribution (CCD) or Routing Services Intelligence (RSI) distribution
- · Present in an active processing group
- · With a Pro-ACD phone set

This user guide provides step-by-step procedures to handle Contact Center (CC) features from the Pro-ACD phone sets (login/logoff, incoming ACD call handling, and agent state management). They are detailed through the black and white graphical display of the Pro-ACD sets.

#### Caution:

The screenshots displayed in this document are not contractual, they are provided as examples only, and may not correspond exactly to their actual appearance.

For the features displayed on screen and not described in this user guide, refer to the business guides available from the Enterprise Business Portal.

# Contact Center feature keys

On phone sets, Contact Center (CC) features are available via either dynamic keys (softkeys) or programmable keys.

Key layout is identical on all phone sets (8008/8018 DeskPhone, 8028s Premium DeskPhone, and 8029 Premium DeskPhone).



Figure 2.1: Key layout for 8028s Premium DeskPhone sets

## 2.1 CC features available via softkeys

Softkeys are associated with dynamic (context-sensitive) labels which change according to the current state of the set. Select a dynamic label using the navigation arrows (keys) and press the associated softkey to make your final selection.

Each dynamic label is associated to a particular CC feature:

Label	Meaning
Unavailable To be in withdrawn position in the processing group (you are still available to receive internal or external personal calls)	
Wrap-Up To perform off-line tasks (you are not available for new calls)	
Supervisor To call directly a supervisor	

## Contact Center feature keys

Label	Meaning	
Log-Off	To log out from a processing group and the Contact Center distribution	
LogOn	To log on into a processing group and the Contact Center distribution	
Private info	e info  To display business information about your private set (if private agent number configured)	
Pres. Guide To manage your welcome guide message		
Email	mail To indicate you are in email state on your desktop application	
Chat	To indicate you are in chat state on your desktop application	
Campaign To indicate you are in campaign state on your desktop application		
Callback To indicate you are in callback state on your desktop application		

## 2.2 CC features available via programmable keys

Programmable keys are pre-programmed keys providing quick access to CC features. These programmable keys are associated to your agent's directory number, and accessible, either via:

- The **perso** tab on the set screen
- Additional key modules (10-key, 14-key, 20-key, or 40-key module) connected to the set

The CC features that can be programmed on these keys are:

Programmable Key	Meaning
Headset To turn the headset feature on/off	
Pilot fwd To enable/disable general forwarding of a preselected pilot	
PG Op/CI To manually close/open the processing group to which you are assigned	

## Chapter

3

## Set logon

### 3.1 Overview

The logon procedure depends on the agent type:

- · Fixed agent: agent associated to a specific set, who can only log on from this set.
- **Mobile agent**: agent not associated to a specific set, who can log on from any set not associated to another agent.

There are two ways that an agent can log on to the Contact Center:

- · Ordinary agent: agent automatically assigned to a processing group when logged on
- · Self-assignable agent: agent who can select a processing group from a list when logging on

## 3.2 Logging on without identification (fixed agent)

**Role**: This feature allows you to log on to a processing group as fixed agent.

**Prerequisites**: This feature is accessible when your set is idle, declared as **ACD authorized phone set** (**LogOn** softkey present on screen), and associated to an agent directory number.



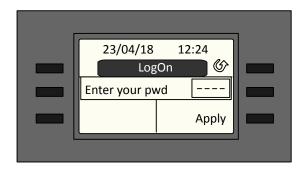
Note:

The **LogOn** softkey position depends on system management. By default, the **LogOn** softkey is in position 8 in the **menu** tab.

#### Procedure:

1. Press the LogOn softkey

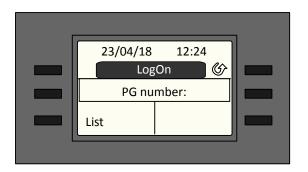
The following screen is displayed:



Note:

This password request is optional, as specified in system management.

- 2. Enter your password and press the Apply softkey
  - If you log on as **ordinary agent**, you are automatically logged on into your assigned processing group, and the logon procedure is complete (see **Result** below)
  - If you log on as self-assignable agent, the PG number window is displayed:



#### Enter:

- Either your assigned processing group number
- Or press the **List** softkey, then select the number of the processing group that you want to join

#### Note:

You may be prompted to activate your headset at this moment. If it is the case, refer to: Activating the headset feature on logon on page 12.

**Result**: Once activated, the screen displays your agent directory number and a message which differs according to agent state:

Agent state	Message displayed on screen
Pre-assigned agent	Pre-ass Agent
Agent assigned and available in an open processing group	Available Agen
Agent assigned and unavailable for an open processing group	Agent Unavail (*)
Agent assigned and available in a manually closed processing group	PG Manu. Closed
Agent assigned and unavailable in a manually closed processing group	PG Manu. Closed (*)
Agent assigned and unavailable in an automatically closed processing group	PG Auto. Closed (*)

(\*): A selected check box is displayed next to the Unavailable softkey.

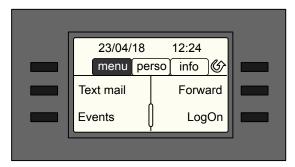
**Example**: The following screen displays an agent assigned and available in an open processing group:



## 3.3 Logging on with identification (mobile agent)

Role: This feature allows you to log on to a processing group as a mobile agent.

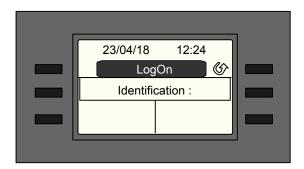
**Prerequisites**: This feature is accessible when the set is idle, declared as **ACD authorized phone set** (**LogOn** softkey present on screen), and not associated to an agent.



#### Procedure:

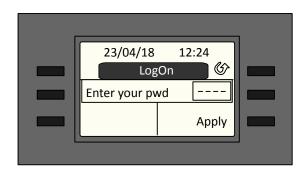
1. Press the LogOn softkey

The following screen is displayed:



2. Enter your identification number (agent directory number)

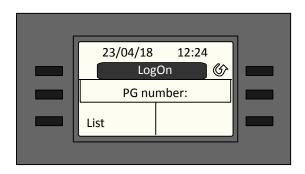
The following screen is displayed:



#### Note:

This password request is optional, as specified in system management.

- 3. Enter your password and press the Apply softkey
  - If you log on as ordinary agent, you are automatically logged on into your assigned processing group, and the logon procedure is complete (see Result below)
  - If you log on as self-assignable agent, the PG number window is displayed:



#### Enter:

- · Either your assigned processing group number
- Or press the **List** softkey, then select the number of the processing group that you want to join

### Note:

You may be prompted to activate your headset at this moment. If it is the case, refer to: Activating the headset feature on logon on page 12.

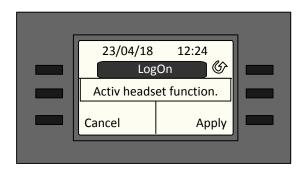
**Result**: Once activated, the screen displays your agent directory number and a message which differs according to agent state. The possible agent states are the same as for a **Logon without identification** (see: Logging on without identification (fixed agent) on page 9).

## 3.4 Activating the headset feature on logon

**Role**: This feature allows you to activate your headset on logon.

**Prerequisite**: This feature is accessible if your agent settings provide the **Headset** programmable key. If you are assigned to a processing group for which the **Headset mandatory** parameter is validated, your headset is activated by default

Once logged on to the set, the display shows:



**Procedure**: Press the **Apply** softkey to activate the headset feature.

**Result**: Once activated, the set is idle (see: Idle set on page 14), a selected check box is displayed next to the **Headset** programmable key (**perso** tab or additional key module).

## Chapter

4

## Idle set

#### 4.1 Overview

When the set is idle, the **CC** tab displays on screen, for example:



When you press successively the down navigation key, the screen changes and provides access to softkeys dedicated to CC features (see: CC features available via softkeys on page 7).

If you select the **perso** tab (or use an additional key module), you may have access to programmable keys dedicated to CC features (if configured in management) (see: CC features available via programmable keys on page 8).

## 4.2 Agent language

**Role**: This feature allows you to select the interface language when you are pre-assigned, or logged on to a processing group from this set. It can differ from the language interface used by this set when running in business mode.

#### Procedure:

- 1. Select the **menu** tab using the navigation keys (left or right)
- 2. Use the softkeys to go to: Settings > Phone > language
- 3. Select the language of your choice, and press the **OK** button

Result: The selected language interface is immediately applied to the set.

#### 4.3 Set information

#### 4.3.1 Agent information

**Role**: This feature allows you to display information associated to your agent characteristics.

**Procedure**: Select the **info** tab using the navigation keys (left or right).

Result: The information displayed on screen are:

- Agent characteristics such as: name, directory number, processing group to which you are assigned, and private number (if configured)
- The status of telephone features associated to your agent characteristics, such as: new messages, unanswered calls, call forwarding (if activated)

#### 4.3.2 Private information

Role: This feature allows you to display your private information (if a private agent number is configured in management).

Procedure: Select the CC tab using the navigation keys (left or right), and press the Private info softkey.

**Result**: The information displayed on screen depends on your private number:

- · If your private number is your agent number, the information displayed are identical to those of the info tab (see: Agent information on page 14)
- If your private number is a number other than your agent number (business set for example), the information displayed only concerns your private number (private set characteristics and status of the telephone features associated to the private set characteristics)

## 4.4 Set in multimedia state (Email, Chat, Campaign, or Callback)

**Role**: This feature displays your current multimedia state on phone screen.

When in a multimedia state, telephone features are restricted as described below.

- When you are in **Email** or **Chat** state:
  - Incoming CC calls are unauthorized (distributed, direct or transferred) (\*)
  - Outgoing CC calls are authorized but become private
  - · Incoming and outgoing private calls are authorized
  - Waiting on busy set and automatic callback are unauthorized when your are in communication
  - · Call pickup is unauthorized
  - Retrieve parked call is unauthorized

(\*): Except in the particular case of interruptible email where incoming CC calls are authorized. Once the incoming CC call is finished, you return to the **Email** state.

- When you are in Campaign or Callback state:
  - Incoming CC calls are unauthorized (distributed, direct or transferred)
  - · Outgoing CC calls are authorized

You do not return to the current multimedia state once the call finished.

- Incoming private calls are unauthorized
- Outgoing local private calls are authorized
- Waiting on busy set is unauthorized when your are in communication
- Automatic callback is authorized when your are in communication
- · Call pickup is authorized
- Retrieve parked call is authorized

## 4.5 Queue supervision on LED

The LED of your set provides information on the presence of queued calls or the saturation of one of the gueues serviced by your processing group.

The available LED states are:

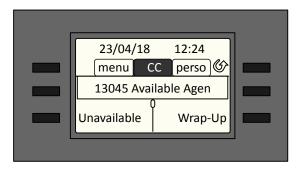
LED state	Meaning	
Orange flashing	lashing At least, one queue is saturated	
Orange steady on	Orange steady on At least, one call is queued	
Green flashing At least, one message (voice or text) and/or one callback request queue set		
Off	No message and/or one callback request queued on your set, no call queued and no queue is saturated	

## 4.6 Temporary unavailability

Role: This feature makes you temporarily unavailable from the processing group.

**Prerequisites**: This feature is available when your set is either in **idle**, **wrap-up** or **pause** (between calls) state.

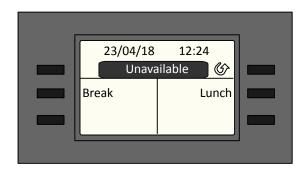
Procedure: Example when the set is in idle state:



The procedure is identical when the set is in wrap-up or pause state.

1. Press the Unavailable softkey

The following screen is displayed:



#### Note:

Each of these softkeys represents a type of temporary unavailability taken into account for statistics. There can be up to nine different unavailability types defined for your processing group.

**2.** If there are several unavailability types displayed on screen, press the softkey corresponding to the type of unavailability that you want to apply to your set

Result: Once activated, the following screen is displayed:



A selected check box is displayed next to the Unavailable softkey.

To exit from the temporary unavailability and come back to the previous state, press the **Unavailable** softkey again.

## 4.7 Manual wrap-up

Role: This feature allows you to carry out non-telephone work without being interrupted by calls.

Prerequisites: This feature is available when your set is either in idle or pause (between calls) state.

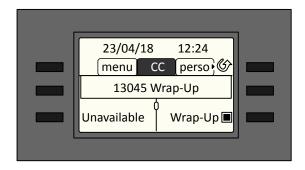
Procedure: Example when the set is in idle state:



The procedure is identical when the set is in **pause** state.

1. Press the Wrap-Up softkey

The following screen is displayed:



A selected check box is displayed next to the Wrap-Up softkey.

2. To exit from the wrap-up state and come back to the previous state, press the Wrap-Up softkey, or wait for the expiration of the wrap-up timer defined for your processing group.

The wrap-up timer differs according to the initial state of your set: idle or pause.

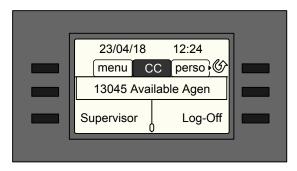
## 4.8 Supervisor call

Role: This feature allows you to call a supervisor.

Prerequisites: This feature is accessible if your set is either in idle, wrap-up or pause (between calls)

state.

Procedure: Example when the set is in idle state:

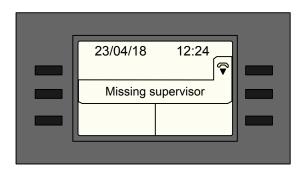


The procedure is identical when the set is in wrap-up or pause state.

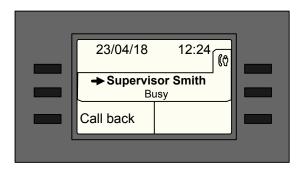
Press the **Supervisor** softkey.

Result: Once activated, the information displayed on screen depends on the state of the supervisor:

 If no supervisor is present, the call is rejected and the following message is temporarily displayed on screen:



• If the supervisor is busy, the following screen is displayed:



You can prompt the supervisor to call you back by pressing the Call back softkey.

• If the supervisor is in idle state, the supervisor set is rung and the following screen is displayed:



You can prompt the supervisor to call you back by pressing the Call back softkey.

· When the supervisor answers, the following screen is displayed:



The following softkeys are available:

Softkey	Meaning	
New call To make a new call (consultation call)		
Supervisor To call directly a supervisor		

## 4.9 Agent welcome guide

**Role**: This feature allows you to program a welcome guide on your set. This welcome guide (also called presentation guide) is played to external callers when you pick up the set to answer calls. The **End of guide** softkey allows you to stop playing your agent welcome guide.

Prerequisite: This feature is accessible if your agent state is: Available Agen or Pre-ass Agent.

**Procedure**: Example when your agent state is **Available Agen**:



The procedure is identical when your agent state is **Pre-ass Agent**.

Press the Pres. Guide softkey.

**Result**: Once activated, the following screen is displayed:



You can configure your agent welcome guide via the following softkeys:

Softkey	Meaning	
Record To record a welcome guide		
Download To download the welcome guides you have previously recorded		
Apply To select the welcome guide to be played to callers		
Listen To listen to the welcome guide played to callers		

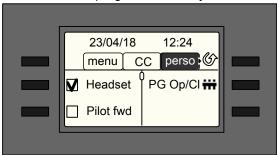
### 4.10 Headset use

Role: The headset feature allows you to replace the handset receiver with an audio headset.

**Prerequisite**: This feature is available if your agent settings include the **Headset** programmable key. This programmable key is located either on the **perso** tab, or a key on an additional module (if connected to the set).

Procedure: Press the Headset programmable key.

**Result**: The check box next to the **Headset** programmable key is selected.



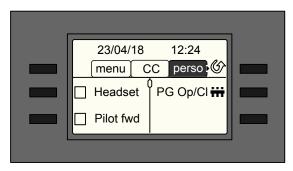
The Mute key (green steady LED) is used to activate or deactivate automatic answer.

## 4.11 Pilot general forwarding

## 4.11.1 Activating the pilot general forwarding

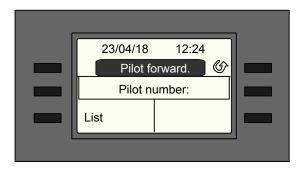
**Role**: This feature allows you to place a pilot in general forwarding. All incoming calls on this pilot are handled by the general forwarding system (a voice guide, a phone number or a call distribution rule).

Prerequisite: This feature is available if your agent settings include the Pilot fwd programmable key. This programmable key is located either on the perso tab, or a key on an additional module (if connected to the set).

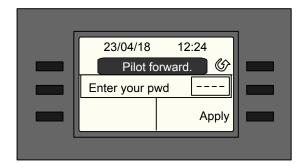


**Procedure**: To place a pilot in general forwarding:

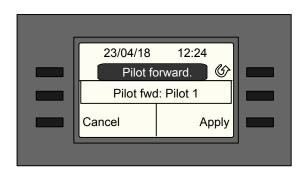
1. Press the Pilot fwd programmable key The following screen is displayed:



2. Enter the pilot number or press the List softkey to select the corresponding pilot If the pilot number is correct, the following screen is displayed:



3. Enter your password and press the Apply softkey If the password is correct, the following screen is displayed:



4. Press the Apply softkey to confirm pilot general forwarding

**Result**: A confirmation message is temporarily displayed on screen, and the set comes back to its previous state.

## 4.11.2 Cancelling the pilot general forwarding

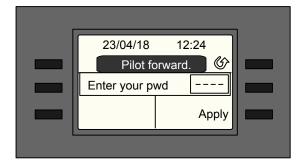
**Procedure**: To cancel the general forwarding for a pilot:

1. Press the Pilot fwd programmable key

The following screen is displayed:

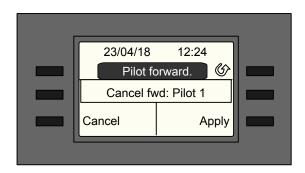


**2.** Enter the pilot number or press the **List** softkey to select the corresponding pilot If the pilot number is correct, the following screen is displayed:



**3.** Enter your password and press the **Apply** softkey

If the password is correct, the following screen is displayed:



4. Press the Apply softkey to confirm the cancellation of the pilot general forwarding

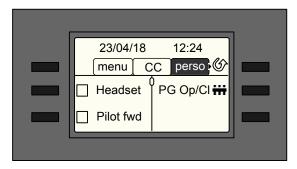
**Result**: A confirmation message is temporarily displayed on screen, and the set comes back to its previous state.

## 4.12 Manual closing/opening of a processing group

### 4.12.1 Closing manually a processing group

**Role**: This feature allows you to close the processing group to which you are assigned and logged on. When closed, the processing group cannot process incoming CC calls.

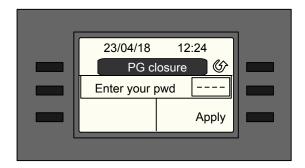
**Prerequisite**: This feature is available when your agent settings include the **PG Op/CI** programmable key. This programmable key is located either on the **perso** tab, or on a key on an additional module (if connected to the set).



#### Procedure:

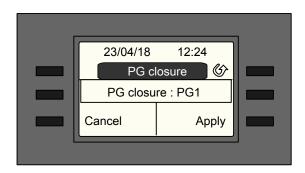
1. Press the PG Op/CI programmable key

The following screen is displayed:



2. Enter your password

If the password is correct, the following screen is displayed:



3. Press the Apply softkey to close the processing group

**Result**: A confirmation message is temporarily displayed on screen, and the set comes back to its previous state. Processing group closure is indicated on screen by the **Pg Man. Clos.** message, and the **#** icon next to the **PG Op/CI** programmable key.

## 4.12.2 Opening a processing group manually

**Role**: This feature allows you to open the processing group to which you are assigned. Once opened, a processing group can process incoming CC calls.

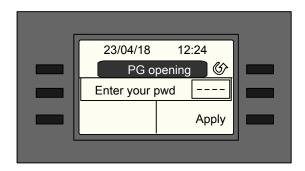
**Prerequisite**: This feature is available when your agent settings include the **PG Op/CI** programmable key, and the associated icon is set to **#**. This programmable key is located either on the **perso** tab, or a key on an additional module (if connected to the set).



#### Procedure:

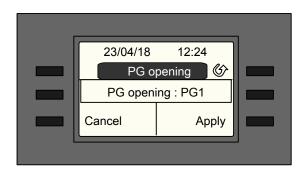
1. Press the PG Op/CI programmable key

The following screen is displayed:



2. Enter your password.

If the password is correct, the following screen is displayed:



3. Press the Apply softkey to open the processing group

The state of the icon next to the PG Op/CI programmable key also takes into account the automatic closing/opening of the corresponding processing group, handled by the Contact Center:

Icon state	Meaning
₩ (steady) Processing group opened manually	
<b>₩</b> (steady)	Processing group closed manually
₩ (flashing) Processing group opened automatically	
₩ (flashing) Processing group closed automatically	

# Ringing set

## 5.1 Overview

When your set rings, the information displayed on screen depends on:

- The type of incoming call (CC call, direct CC call, or private call)
- The type of display on the agent sets defined in processing group settings (system management), which can include:
  - · Caller characteristics
  - · Pilot characteristics
  - · Entity characteristics
  - Call tag
  - · Waiting time in CC call distribution

The information displayed on screen can also be a mix of the items listed above (for example: caller and pilot characteristics, or caller and entity characteristics).

#### 5.2 CC call and direct CC call

Depending on the selected configuration (for example: caller and pilot characteristics must be displayed on screen), when your set rings on incoming CC call, caller and pilot characteristics are displayed on screen:



Take the call by pressing the Take call softkey.

#### 5.3 Private call

When your set rings, the screen displays:



Caller number is displayed on screen.

5

Take the call by pressing the **Take call** softkey.

### 5.4 Call forwarded to the Contact Center

Depending on the selected configuration, when a call is forwarded to the Contact Center and routed to your set, your set rings and the screen displays, either:

- Caller name (name of the forwarded set) => Called number (directory number of the pilot entry point of the Contact Center)
- Caller number (directory number of the forwarded set) => Called name (name of the pilot entry point of the Contact Center)
- Caller name (name and directory number of the forwarded set)

The star (\*) displayed at the end of the line indicates that the incoming call is a CC call.

The symbol  $\Rightarrow$  indicates that the incoming call is a forwarded call.

Example when the set rings on a forwarded call:



To take the call, press the Take call softkey.

#### Note:

This display format also applies when a CC call is transferred to a pilot by another agent and routed to your set by this pilot. In this case, the caller information displayed on screen is the pilot which initially handled the CC call, and not the agent who has initiated the CC call transfer.

## Set in communication

## **6.1 Overview**

When in communication, the screen displays, for example:



When you press successively the down navigation key, the screen changes and provides access to softkeys dedicated to telephone features:

Label	Meaning	
New call	New call To make a call (consultation call)	
Help	To request supervisor help	
Supervisor	Supervisor To call directly a supervisor	
Send DTMF To dial DTMF digits		

Note:

The softkey position on screen depends on system management.

## 6.2 Request for supervisor help

**Role**: This feature allows you to request help from a supervisor when you are in a CC communication or external private communication (if authorized). The supervisor can listen and/or participate to the conversation.

Procedure: Example when the set is in CC communication:



Press the **Help** softkey to request help from a supervisor belonging to your processing group.

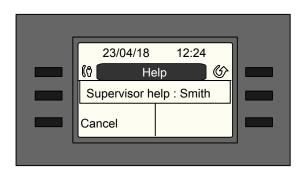
Result: Once activated, the information displayed on screen depends on the state of the supervisor:

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Supervisor state	Message displayed on screen
The supervisor is absent	Missing supervisor
	The set returns to the conversation state after expiry of a system timer.
The supervisor is not free (help request	Busy supervisor
refused)	The set returns to the conversation state after expiry of a system timer.
The supervisor is free	Supervisor help followed by the supervisor name or directory number (if configured in system management) (*).
	If the supervisor does not do anything, the help request remains active permanently (the message <b>Supervisor help</b> is always displayed on screen). To cancel the help request, press the <b>Cancel</b> key.
	If the supervisor accepts the help request, but rejects it after, or does not do anything (listen or intrude in a call), the help request is stopped after expiry of a system timer and the screen returns to the initial message <b>Conversation</b> .

## (\*): During the help request:

• You are still in conversation with the caller. To cancel the help request, press the **Cancel** softkey.



• The supervisor can perform any of the following operations:

Supervisor action	Message displayed on screen
Listen the conversation	Sup. listening
Normal intrusion into the conversation	Normal intrusion
Restricted intrusion into the conversation without indicating his/her presence to the external caller	

### Note:

- During normal supervision, a beep is sent to warn the caller
- Depending on authorization, these messages indicate the presence of the supervisor when your set is being monitored

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## 6.3 Supervisor direct call

**Role**: This feature allows you to call a supervisor while you are in conversation (CC communication, local communication, or personal external communication).

**Procedure**: Example when the set is in CC communication:



Press the Supervisor softkey.

Result: Once activated, the information displayed on screen depends on the state of the supervisor:

Supervisor action	Message displayed on screen
No supervisor is present	Missing supervisor
The supervisor is busy	Busy (*)
	The set returns to the conversation state after expiry of a system timer.
The supervisor is in idle state	Alerted (*)
The supervisor answers	Conversation (*)
	When the communication with the supervisor is released, the set returns to the conversation state.

(\*): If configured in management, the supervisor name or directory number is also displayed on screen.

## Set in end of communication

#### 7.1 Transaction or business code

Role: This feature is used at the end of a conversation, to enter information that can be used for statistics.

At the end of a conversation, you may be prompted to enter a transaction or business code. In this case, the following screen is displayed:

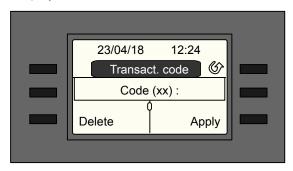


Figure 7.1: Screen example for transaction code entry

or

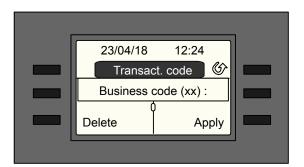


Figure 7.2: Screen example for business code entry

The number of digits that must be entered is indicated in brackets.

The following softkeys are available for the code configuration:

Softkey	Meaning
Rubout	To correct the last entered code digit
Delete	To delete the code
Apply	To validate the code
Cancel	To cancel code entry

#### Procedure:

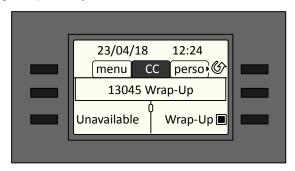
- 1. Enter the number of the code (transaction or business code)
- 2. Press the Apply softkey to validate code entry

**Result**: If the code has been entered before a system timer expires, the screen displays the **Code registered** message, and the set is either in **wrap-up**, **pause** or **idle** state.

## Set in end of communication

## 7.2 Automatic wrap-up

**Role**: At the end of a communication or following the **transaction code** phase, the set can switch to the automatic **wrap-up** state (if configured in management). This phase is used to carry out non-telephone operation. During this period, your set is not available to receive calls.

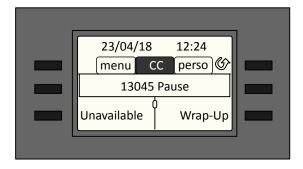


**Procedure**: To exit from the **wrap-up** phase, press the **Wrap-Up** softkey or wait for the expiry of the wrap-up timer.

**Result**: The set switches to the **pause** (between calls) state.

### 7.3 Pause between calls

**Role**: This phase starts as soon as the **wrap-up** phase is complete. The **pause** (between calls) phase allows you to handle personal (local and external) calls.



No action is required to exit the **pause** phase. Wait for the expiry of the pause timer.

Note:

To activate the wrap-up phase in pause, press the Wrap-Up softkey.

The set switches to the wrap-up phase. At the end of wrap-up, the set returns to the pause phase.

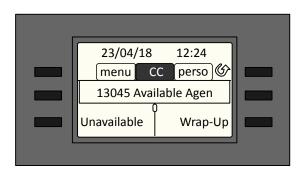
Result: The set switches to the idle state.

# Set logout

**Role**: This feature allows you to log out from the processing group and the Contact Center distribution (CCD or RSI).

**Prerequisite**: A pre-assigned or assigned agent can log out from the processing group when the set is in any of the following state: **idle**, **wrap-up** or **pause** state.

Figure 8.1: Example of set in idle state



#### Procedure:

1. Press the Log-Off softkey

The following screen is displayed:



2. Enter your password and press the **Apply** softkey

**Result**: Once logged off, the screen displays the **Log-Off registered** message on screen, and the set returns to the business position.

#### Caution:

Depending on system management, you may not be allowed to log out if you are the last assigned agent in the processing group.