

Oracle® Contact On Demand

Interaction Manager Guide

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Preface

This guide describes the features and functionality of Interaction Manager.

Audience

This guide is intended for users of Interaction Manager.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Oracle Contact On Demand Administration Manager Guide*
- *Oracle Contact On Demand Supervision Manager Guide*
- *Oracle Contact On Demand Release Notes* on My Oracle Support

Conventions

The following text conventions are used in this document:

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

What's New in This Release

This chapter lists new features and changes.

What's New in Oracle Contact On Demand Interaction Manager Guide

Table 1–1 lists the changes in this version of the documentation to support this release of the software.

Table 1–1 *What's New in Oracle Contact On Demand Interaction Manager Guide, Version 8.2.1*

Topic	Description
"Starting and Logging In" on page 2-1.	Updated topic. This topic describes logging into and getting started with Interaction Manager. It has been updated to include changes introduced in this release involving user-interface behavior and the acceptance of interactions.
"Features and Benefits of Interaction Manager" on page 3-2.	Updated topic. The topics describing the Bottom Bar and the Interaction Tab have been removed.
"Toolbar" on page 3-3.	Updated topic. It describes the features and functionality of the Toolbar to include online and offline as well as on-hook and off-hook indicators.
"Navigation Control Panel" on page 3-4.	Updated topic. The topic has been renamed from Sidebar to Navigation Control Panel. It describes activities that you can perform from the navigation control.
"Interaction Manager Banner" on page 3-5.	Updated topic. It describes the banner in Interaction Manager that displays your login history and availability.
"Resizing Your Workspace Area" on page 3-5.	Updated topic. It describes how you can adjust your workspace to best suit the way you work and the availability of functionality within your workspace.
"Changing Your LogIn Password" on page 4-7.	New topic. It describes changing the login password for an agent for the integrated client.
"Clearing the Results of a Contact Search in the Company Directory" on page 5-5.	New topic. It describes how to clear users from the company directory after performing a query of users.
"Clearing Search Criteria when Transferring a Call" on page 7-8.	New topic. It describes how to clear users identified during a search while performing a call transfer.
"Receiving an ACD Call" on page 7-2.	Updated topic. It describes receiving and accepting an ACD call.

Table 1–1 (Cont.) What's New in Oracle Contact On Demand Interaction Manager Guide, Version 8.2.1

Topic	Description
" Accepting a Chat " on page 9-2.	Updated topic. It describes receiving and accepting a chat interaction.
" Accepting an Email Interaction " on page 13-1.	Updated topic. It describes receiving and accepting an email interaction.
" Accepting a Fax Interaction " on page 15-1.	Updated topic. It describes receiving and accepting a fax interaction.
" Accepting Multiple Interactions " on page 16-1.	Updated topic. It describes receiving and accepting multiple interactions.
" Clearing Contact Records " on page 17-2.	New topic. It describes how to clear contact records after a search for contacts.

Additional Changes

The documentation also contains the following general changes:

[Table 1–2](#) lists the changes described in the documentation to support this release of the software.

Table 1–2 Additional Changes in Oracle Contact On Demand Interaction Manager Guide, Version 8.2.1

Topic	Description
" Changing the Appearance of Icons " on page 4-4.	Modified topic. It describes changing the appearance of icons to suit your individual needs.

Starting Interaction Manager

This chapter describes how to log in to Interaction Manager. It includes the following topics:

- [Starting and Logging In](#)
- [Managing Login Error Messages](#)

Starting and Logging In

You must log in to Interaction Manager to accept interactions, supervise agents, or configure your contact center system preferences.

You must have Internet Explorer or Firefox to start Interaction Manager, to access the online help, and to display pages. For more information about the software requirements, see *Oracle Contact On Demand Installation and Upgrade Guide*. For more information on compatible browser versions, see *Oracle Contact On Demand Release Notes* on My Oracle Support.

Note: The Siebel Bookshelf is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

To start and log in to Interaction Manager

1. Start Internet Explorer version 7.0 or later.
2. Enter the URL address for Interaction Manager provided by your contact center administrator.

The Interaction Manager start screen appears.

3. Create a shortcut, and place it on your desktop so that you can start Interaction Manager in the future.
4. Click the shortcut to start Interaction Manager.

The Copyright screen opens for a short time, and then the Java script loads. Interaction Manager downloads applet changes and any required software or updates. When the Java script finishes loading, the Login screen opens.

5. Type your company alias, user name, and password into the corresponding text fields.
6. Choose your preferred language from the list.

The screens appear in the language that you specify.

7. Click Login.

During the login, a progress bar appears while Interaction Manager authenticates your user name and password. Interaction Manager downloads your data if there have been any changes.

Note: If there are no interactions waiting for you when you first log in to Interaction Manager, the Interaction Control area will be minimized. When a new interaction arrives, the Interaction Control area will expand to display the interaction details. Once you accept the interaction the Interaction Control area will be minimized and only a bar with only the name of the interaction will display. Multiple interactions will display side-by-side. If you are working more than three interactions simultaneously, the active interactions will appear in a drop-down list. If you want to look at the interaction details or take action, you can mouse over the minimized bar to expose the Interaction Control area.

The Interaction Manager main screen opens.

Note: If a login error message appears instead of the main screen, ask your system administrator for assistance.

Tip: Add the Interaction Manager start screen to your browser's Favorites Menu. For subsequent Interaction Manager sessions, load the Interaction Manager start screen by choosing it from your Favorites Menu. (Alternatively, you can use the optional desktop shortcut you created to start Interaction Manager.)

Managing Login Error Messages

Occasionally, you might see one of the following error messages when you log in to Oracle Contact On Demand:

- **Mismatched API message.** A Mismatched API version message appears after Interaction Manager performs an upgrade while you still have the application open. For more information on error messages, see ["Error Message: Mismatched API"](#) on page 2-3.
- **Inactivity Timeout.** If configured, Interaction Manager might automatically log you out if you have exceeded the maximum time set for inactivity, as set by your administrator. For more information on the inactivity error messages, see ["Forcing a Logout Due to Inactivity"](#) on page 2-3.
- **Account Locked. Contact Your Administrator.** Inactivity might cause your account to become locked. For more information on the account locked error message, see ["Account Locked: Contact Your Administrator"](#) on page 2-3.
- **Invalid JVM.** Please contact your administrator. For more information on the JVM error message, see ["Forcing a Logout Due to Inactivity"](#) on page 2-3.
- **Error loading applet, please contact your Administrator.** The applet error message appears if Java is not installed or if you have the wrong version. For more

information about the applet error message, see "[About Java Applet Error Messages](#)" on page 2-3.

Error Message: Mismatched API

As the message instructs, log out and completely shut down the application (do not simply log out). When you have successfully logged out of the application, restart Interaction Manager.

Forcing a Logout Due to Inactivity

If your system administrator sets the maximum time allowed for inactivity, Interaction Manager might automatically log you out if you exceed the time set and the Inactivity Timeout message will display.

Account Locked: Contact Your Administrator

If you are logged out of Interaction Manager due to inactivity, then the next time you attempt to log in, an error message might appear, indicating that you are locked out and you will not be able to login without first asking your system administrator to reactivate your account.

About Java Applet Error Messages

To run Interaction Manager, you must have a Java applet installed on your computer. An applet is a small Internet-based program written in Java (a programming language for the Web). Applets are designed to run inside a Web browser and to perform tasks such as animated graphics and interactive tools.

If Java is not installed, or if you have the wrong version, a message appears informing you of the problem and providing information about solving the problem.

Getting Started

This chapter describes the screen components, and how to customize Interaction Manager. It includes the following topics:

- [About Interaction Manager](#)
- [Screen Components of Interaction Manager](#)
- [Customizing Interaction Manager](#)

About Interaction Manager

Interaction Manager is a Java application, call control and contact management tool for contact center agents. With Interaction Manager, you can communicate with customers in different ways, including by phone, email, and the Web. You can start Interaction Manager by clicking its desktop icon.

Interactions, Projects, and Workgroups

In general, an interaction occurs any time a customer tries to reach the contact center; usually by phone, email, or Web chat. An interaction can also occur when the customer leaves a voice mail message or asks an agent to call back.

Most of the time, customers contact your contact center (as opposed to directly calling you or sending you an email), and Interaction Manager routes or offers the interaction to a specific agent. Interaction Manager uses projects and workgroups to help connect the customer to the agent that most likely has the information that the customer needs. The contact center's system administrator creates projects and workgroups using agent information and skill sets.

A project is based on a specific campaign or objective for handling a group of similar interactions. Its purpose is to identify the media types involved, their handling, and to identify which workgroups are to receive specific interactions. Examples of projects include Sales, Technical Support, Accounts, and so on. Usually, customers dial a phone number associated with a specific project. Each project can then route the calls to one or more workgroups. For example, the Technical Support project might route customers to the UNIX - English or UNIX - Spanish workgroups.

A workgroup is a list of agents who are grouped by skills or job function. For example, if you speak Spanish and are an expert in UNIX, your administrator will probably put your name in the UNIX - Spanish workgroup. Thus, when a Spanish-speaking customer calls with a UNIX question, Interaction Manager routes the customer to you or someone else who is also in that workgroup, depending upon availability.

Features and Benefits of Interaction Manager

Interaction Manager includes feature sets, which system administrators can customize according to each contact center's requirements. Agents use Interaction Manager to perform various functions, defined by the features included for their contact center. The following list describes the major features and benefits users can experience while using Interaction Manager:

- **Multimedia Ready.** Accepting phone calls, email, ACD voice mail, Web originated chats, and callback requests.
- **Conferencing.** This feature allows agents, supervisors, and customers to speak in the same phone conversation.
- **Interaction History.** Shows what happened to customers when they reached your contact center.
- **Full-Billing Control.** You can account for all calls.
- **Automatic Screen Pops.** Using ANI (Automatic Number Identification) or an email address.
- **Accessible Company Directory.** Easy to access the company directory.
- **Automatic Display of Missed Calls.** Automatically displays the number of missed calls and personal voice mail, retrievable using direct links.
- **Automatic Display of Project Name.** Automatic display of project name or phone number (DNIS) with each interaction.
- **Web-Callbacks.** Support for specific contact center scripts. Agents can respond to Web customers quickly and with the information that the customer needs.
- **Preview Dialing.** Support for preview outbound dialing modes.
- **Project-Specific Screen Pops.** Facilitates using the contact center tool-based workspaces for interaction handling and other independent functions.
- **Intelligent chat.** Uses keyword matching to find recommended chat responses.
- **Intelligent email.** Uses keyword matching to find recommended email responses.

Screen Components of Interaction Manager

Each area of the main page provides specific information and links to help you perform your job more efficiently. Also, you can enlarge or shrink the workspace area to fit your needs.

The main areas of the page include the following:

- ["Workspace"](#) on page 3-3
- ["Interaction Manager Banner"](#) on page 3-5
- ["Toolbar"](#) on page 3-3
- ["Navigation Control Panel"](#) on page 3-4
- ["Interaction Control Bar"](#) on page 3-5
- ["Interaction Tab"](#) on page 3-5

Workspace

The workspace area is where agents handle most of their tasks. The information that appears in the workspace pertains to an individual interaction or independent action. You can see contextually sensitive information relative to the specific tasks and specific interactions. For example, when you are handling an interaction, the workspace area is where contact screens appear and where you can perform searches.

In addition, the workspace area also recalls the state of each interaction. This memory allows you to switch between interactions and, upon your return, still maintain the context of the interaction in the state that you left it. Workspace memory also applies to independent activities accessed from the Sidebar. This means you can switch between independent activities and interactions without redeploying a search or other function.

Note: If you log out and log in again, Interaction Manager returns you to the same information.

Interaction Manager Banner

When you first log in to Interaction Manager, the Interaction Manager Banner shows you your login history to include your last successful login and the number of failed attempts. You must click OK to acknowledge.

The Interaction Manager Banner also displays the number of interactions currently in the queue for each of the workgroups to which you belong. Workgroup statistics (from one workgroup to another) and the total, scroll every 10 seconds. You can stop and restart the scrolling as needed. The Interaction Manager Banner also displays any supervisor message that might have been sent, which you must acknowledge.

When you minimize your workspace in Interaction Manager, the banner remains present for you to monitor your interaction statistics.

Toolbar

The Toolbar provides an instant view of your status. From the Toolbar, you can start a variety of interactions, and define several personal preferences.

No matter which page is open, the Toolbar remains at the top of the screen, even if you collapse windows to maximize the usable space. You can always see icons representing Agent Status, the Dialer, popular actions, the company directory, messages, missed calls, online help, configuration options, and log out. [Table 3–1](#) describes each Toolbar item in greater detail.

Table 3–1 *Toolbar Items and Descriptions*

Toolbar Item	Description
Agent status display (or selection)	<p>Displays your name and current status. You can change your status by choosing a selection from the list. The list includes both system and custom statuses, so they might vary. However, you will always see: Available, Busy, Last Call, and On Break. (Your administrator can define more custom statuses, such as At Lunch, In Meeting, In Training, and so on.)</p> <p>Note: Your status must be Available for you to receive incoming interactions.</p>

Table 3–1 (Cont.) Toolbar Items and Descriptions

Toolbar Item	Description
Dialer	Click this link to open the Dialer, which you can use to dial an interaction of various types (such as Outbound call, Extension call, PBX call, and IP call). Note: Extension call will only display if your system administrator has configured the option. If the Extension call option is not available, contact your system administrator. You can also access the Speed Dialer tab, where you can select a predefined numbers assigned to a longer-stored, often-used, number.
Actions	Click this link to select an action from a list (such as Connect To Server, Put in the Do Not Call List, and Redial.)
Online/Offline	Displays your current connection status.
On Hook/Off Hook	Displays your current phone line state.
Directory	Click to open the company directory, where you can find information about another user at your company (such as phone numbers, extension number, presence, or absence, status, and addresses).
Voice Mail	A red voice mail message link appears when you have one or more personal voice mail messages waiting for you. Click the link to open the voice mail inbox, where you can view more information, or listen to the voice mail message. The link appears black after you finish, and persists until you delete all the messages that you checked in your inbox.
Missed Messages	A red, missed-call message link appears if a caller hangs up before you answer the call that was dialed directly. Click the link to open the Missed Messages box, where you can view more information or return the call. After viewing your message, the link turns black, and persists until you delete all viewed messages.
Help icon	Click this link to open the online help about the page. Help also includes an index and a word or phrase search feature.
Configure	The Configure option on the Toolbar appears as a box with a check mark. Click the box to open the Configure Menu, where you can set various preferences (such as Incoming Interaction Notification mode, your Email Client, Project Billing for phone calls, your telephone number, customized icons, time zone formatting, and date formatting).
Logout	Click this link to log out of Interaction Manager.

Navigation Control Panel

The Navigation Control Panel also commonly referred to as the *Sidebar* provides access to independent activities and information, which might include your statistics, contacts, outbound previews, work items, and interaction histories. (*Independent activities* are activities that are not directly related to the interactions in progress.) Additional interactions are available from a list.

Note: You can select and start calls between interactions using Outbound Preview.

In addition, the Navigation Control Panel capabilities are extended using XML file extensions for future enhancements.

If the company is enabled for CRMOD, the Contacts icon will not be present.

Interaction Control Bar

You can access information about an unlimited number of interactions from this area. Because the design is self-adjusting, you can view the details of two or more interactions at one time, depending on your screen resolution and size. [Table 3-2](#) explains the details that you can see, which include real-time information.

Table 3-2 *Interaction Control Bar Items and Descriptions*

Interaction Control Bar Items	Description
Interaction Type icon	Shows the current interaction type by displaying its icon and text.
Contact information for the active interaction	If a contact (customer) is assigned to an active interaction, you see the contact's name and all information previously recorded about the contact in the workspace area. If the contact is unassigned, Unknown appears in place of the name.
Elapsed Time	Shows both the elapsed and wrap-up times for the interaction.
Customer Priority Rating	Shows the customer priority level or (for a contact without an assigned level) shows the priority level of the project through which the customer called.

Interaction Manager Banner

When you first log in to Interaction Manager, the Interaction Manager Banner displays at top of your workspace and shows you your login history to include your last successful login and the number of failed attempts. You must click OK to acknowledge.

The Interaction Manager Banner also displays the number of interactions currently in the queue for each of the workgroups to which you belong. Workgroup statistics (from one workgroup to another) and the total, scroll every 10 seconds. You can stop and restart the scrolling as needed. The Interaction Manager Banner also displays any supervisor message that might have been sent, which you must acknowledge.

The Interaction Manager Banner will remain visible when you minimize your workspace.

Interaction Tab

The activities that you can access from the tab are the focus of this guide.

Customizing Interaction Manager

There are many ways to customize Interaction Manager. You can:

- Identify specific settings, such as notification preferences, phone options, regional settings, and so on. For more information on configuration, see ["Specifying Sounds for New Interactions"](#) on page 4-1.
- Resize your workspace area.

Resizing Your Workspace Area

You can adjust the size of the workspace area to view all information, without further navigation or scrolling. Adjust the size by clicking one or all of the three arrows

positioned at the top, bottom, and left side of the workspace. They provide an easy, one-click, (toggle) open-and-close option. You can click:

- **Left side.** Opens or closes the sidebar
- **Bottom.** Opens or closes the workspace and sidebar, while retaining the Interaction Manager banner

When you close the Sidebar, only the icons appear.

Note: You can also resize your entire window, using click-and-drag functions.

The presentation of interactions in Interaction Manager depends on how you manage your workspace. You can choose to customize your workspace to show:

- **Full Screen.** Displays your full workspace, banner, and sidebar

Note: When you accept interactions, the details of the interaction will display above your workspace.

- **Minimized Screen.** When minimized, your workspace is reduced to the information contained in Interaction Manager banner, toolbar, and accepted interactions.

Configuring Interaction Manager

This chapter describes how to configure various settings, after logging in to Interaction Manager. Although the default settings allow you to use Interaction Manager immediately, you can change these settings to meet any unique requirements that you might have.

If you work from multiple locations (such as from the contact center, from your home, and from a different office location), then you must configure your telephone settings each time that you change locations.

This chapter includes the following topics:

- [Specifying Sounds for New Interactions](#)
- [Identifying Your Email Program](#)
- [Playing a Welcome Prompt](#)
- [Working Off-Hook](#)
- [Accepting ACD Calls Automatically](#)
- [Selecting a Project for Billing](#)
- [Changing the Appearance of Icons](#)
- [Configuring Phone Options for Different Locations](#)
- [Setting Regional Options \(Time Zone and Date Formats\)](#)
- [Setting Email Options](#)
- [Recording Voice Mail Prompts](#)
- [Changing Your LogIn Password](#)

Specifying Sounds for New Interactions

You can configure Interaction Manager to play a specific sound to make you aware of the arrival of a new interaction. In addition, you can direct Interaction Manager to play the sound once, or continuously until you accept the interaction.

To specify sounds for new interactions

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. In the General tab, select the Popup check box to automatically display the Interaction Manager screen in the foreground, whenever you receive interactions.

3. Select the Play Sound check box, and then identify which sound file to play by doing one of the following:
 - Type the path and file name of the sound (.wav) file in the Sound File text box.
 - Click Browse, locate the sound (.wav) file on your computer or network, and then click the file name.

When you receive an interaction, Interaction Manager plays the sound once.

Note: You can load a different sound file at any time. However, for Interaction Manager to play the sound, you must check the Play Sound box. You can play only .wav files.

4. Select Play Sound Continuously.

Interaction Manager plays the sound (.wav) file you loaded in Step 3 repeatedly until you accept the interaction.

5. Click OK to save your configuration settings.

Identifying Your Email Program

To manage email or voice mail interactions, you must tell Interaction Manager which email client application to start (such as Microsoft Outlook Express), if the email client is different from your default setting.

To identify your email program

1. From the Toolbar, click Configure.

The Configuration dialog box opens.
2. In the Email Client Configuration text box, do one of the following:
 - Type the path and file name of the email program that you want to use, and add /recycle to the path, so that only one instance of the email client opens.
 - Click Browse, locate the file on your computer or network, and then click the file name.
3. Click OK.

Interaction Manager automatically logs you in to your Email Client. For more information, see "[Setting Email Options](#)" on page 4-6.

Playing a Welcome Prompt

You can choose to play a Welcome prompt to a customer who makes an ACD call, before the customer begins speaking with you. One example of a Welcome prompt is: *Hello, my name is John Smith. I will be happy to assist you.* Welcome prompts are useful in environments where you give the same greeting to each caller. For more information on prompts, see "[Recording Voice Mail Prompts](#)" on page 4-7.

To play a welcome prompt

1. From the Toolbar, click Configure.

The Configuration dialog box opens.
2. In Other Settings, select the Play Welcome Prompt check box, and then click OK.

Working Off-Hook

Working *off-hook* means that, instead of picking up the phone every time an interaction arrives, you click Accept Interaction. Select off-hook whenever you are using a headset.

To work off-hook

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. In Other Settings, select the Work Off-Hook (Disable Dial Tone) check box, and then click OK.
3. From the Toolbar, click the Actions link, select Connect to Server from the list, and then wait for the phone to ring.
4. When the phone rings, pick up your telephone receiver to begin working off-hook.

Caution: Leave your receiver off-hook until you are finished for the day. Each time you physically hang up the receiver, you must repeat this procedure.

Note: After you select Connect to Server, this option changes to Hang-up, as a reminder to hang up the phone after you finish accepting all calls.

Accepting ACD Calls Automatically

After you log in and your status changes to Available, if you are working in off-hook mode and set to handle calls automatically, Interaction Manager will automatically route phone interactions to you. A zip tone will play upon the arrival of the interaction and a whisper prompt, if configured.

To accept ACD calls automatically

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. In Other Settings, select the Work Off-Hook (Disable Dial Tone) check box.
3. Select the Automatic Call Acceptance check box, and click OK.

Note: The Automatic Call Acceptance feature works only with ACD calls. Interaction Manager does not automatically accept calls made directly to your phone number (such as direct inbound and extension-to-extension calls). For these call types, you must click Accept Interaction to connect to the caller.

Selecting a Project for Billing

If your contact center is configured to allow agents to make outbound calls, you must first select a project. The billing feature allows Interaction Manager to bill your outbound calls to a specific project. When configured for project billing, Interaction

Manager associates the appropriate billing information (by user name) to the outbound call.

If you do not select a billing project, then each time that you make an outbound call, you must select a project from a dialog box.

Note: If you are not sure which billing project to use, ask your supervisor.

To select a project for billing

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. In Other Settings, select the Project Billing check box.
A list of available projects opens.
3. Select a project from the list, and click OK.

Changing the Appearance of Icons

You can change the appearance of icons to suit your individual needs. You can make the icons small or large, and display them with or without text. If you are new to Interaction Manager, you might want to see the icons with their corresponding text descriptions until they become familiar to you by icon alone.

To change the appearance of icons

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. From the Customization list, select Small Icons Without Text, Large Icons Without Text, Small Icons With Text, or Large Icons Without Text.
3. Click OK and, after an Update Successful message appears, click OK again.

Configuring Phone Options for Different Locations

You can access the contact center from a variety of locations. To receive calls at your present location, select the type of phone system your company uses to route calls, and then enter your personal extension number for that system. You will not need to change these settings again as long you do not access the contact center from any other location. However, if you work from multiple locations (such as from the contact center, from your home, or from a different office location), you must configure Interaction Manager each time that you change locations.

Setting Your Phone Extension

Complete the steps in the following procedure to set your phone extension and to identify the type of phone you are using.

To set your phone extension

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. Click the Phone tab, and identify the type of phone that you are using.

Note: If you are not sure which type of phone you are using, ask your contact center administrator.

3. Choose your phone type from the following:

- If you choose SIP (Session Initiation Protocol), enter the IP address for your SIP phone or workstation (if you are using a software phone) in the corresponding address box.

Note: SIP is a signaling protocol for Internet conferencing, telephony presence, events notification, and instant messaging.

- If you chose PBX (Private Branch Exchange), enter your extension number in the corresponding phone box.

Note: PBX is a private telephone network used in an enterprise, which works as a switching system to provide telephone communications between internal stations and external telephone networks. Users of the PBX share a specific number of outside lines for making telephone calls that are external to the PBX.

- If you work remotely, for example, if you work at home or at a site that is different from the contact center, do the following:
 - a. Click Outside Phone, select your Country Code from the list, and then type your phone number in the adjacent box.

Note: If you select Outside Phone, you can also select the Play Announcement check box. When selected, Oracle Contact On Demand plays a recorded message telling you there is a phone interaction waiting to be connected. This feature is useful if you are working from home, because it helps you to distinguish work calls from personal calls. You also have the option of accepting or declining the interaction.

- b. If you choose Dialogic Analog Extension, type your MSI identification number in the Modular Station Interface (MSI) ID box.

Note: This option is for a system that uses an MSI board for a phone extension. If you have an MSI extension, you can also choose to work off-hook. For more information on working off-hook, see "[Working Off-Hook](#)" on page 4-3.

- c. Click OK to save your configuration settings.

Setting an Outside Phone Number

If you plan to travel from one workstation to another, then before you leave, you must enter the number you will be using.

To set an outside phone number

1. From the Toolbar, click the Status arrow, and select Last Call.
2. Click the Configure button.
The Configuration dialog box opens.
3. Click the Phone tab, and select Outside Phone.
4. Select the Country from the list, and type the phone number (including the area code) that you will use at the other location.
5. Click OK, and log out of Interaction Manager.
When you log in at the other location, Interaction Manager will be ready to send interactions to the number that you identified.

Note: Each time that you change phone numbers, you must repeat this procedure.

Setting Regional Options (Time Zone and Date Formats)

You can configure your time zone and date format to match someone else's time zone and date format. You might want to do this, for example, if you work in a different time zone from most of your customers, or your company headquarters.

To set regional options

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. Select the Regional Options tab.
3. Do one of the following:
 - To set your time zone to the same time zone defined for your company, choose Company Defined Time Zone.
 - To set a different time zone, click User Defined Time Zone, and then choose a time zone from the Set Time Zone list.
4. Do one of the following:
 - To set the date format, select the Company Defined Date Format to match your company's format.
 - Select User Defined Date Format, and then select a date format from the list.
5. Click OK to save your configuration settings.

All Interaction Manager screens display the times and dates in the time zone and format that you selected.

Note: The date format for the United States is mm/dd/yyyy. The date format for Europe is dd/mm/yyyy.

Setting Email Options

To receive email you must have the following:

- A server on your network that distributes email (the email server)

- An account on that mail server with your user name and password

In most cases, your administrator sets up your email account. However, if your contact center requires you to change your email server login information, complete the steps in the following procedure.

To set email options

1. From the Toolbar, click Configure.
The Configuration dialog box opens.
2. Click the Email tab.
3. Enter or change the User and Password field information to match your email server login information. You can do this at any time. (If you are not sure what to enter, contact your supervisor or administrator.)

Note: If you click the User and Password fields, but find that you cannot edit the fields, your system administrator has not yet entered your initial email server information in Oracle Contact On Demand Administration Manager. Contact your system administrator to have the email server information entered.

Recording Voice Mail Prompts

You can personalize the recorded message that a customer hears just before you pick up the phone, and before the customer leaves a voice mail message. Some example messages include your personally recorded greeting, your name, and a welcome prompt.

To record voice mail prompts

1. Make sure your phone is configured.
For more information on phone configuration, see ["Configuring Phone Options for Different Locations"](#) on page 4-4.
2. From the Toolbar, click Configure.
The Configuration dialog box opens.
3. Click the Voice-mail Prompt tab.
4. Click the Here link, and wait for your phone to ring.
5. When your phone rings, pick it up, and follow the instructions you hear over your telephone hand set.
6. When you finish recording your message, press Star (*) on your phone, or hang up.
7. Click OK.

Changing Your Login Password

You can change your login password for the integrated client. All password entries are confirmed against the company password requirements. If the new password you enter does not comply with the company password requirements, you will be prompted to enter a different password.

Note: Your supervisor can also change your login password. If your supervisor changes your password while you are currently logged in to Oracle Contact On Demand, you will not be able to change your password unless you have been provided the new password. If you attempt to use your old password, you will receive an error message indicating that password you are attempting to log in with is an invalid original password.

To change your login password

1. From the toolbar, click Configure.
The Configuration dialog box displays.
2. Click the Security tab.
The Change Password dialog box displays.
3. Enter the agent's old password.
4. Enter the new password for the agent.
5. Reenter the new password to confirm the password change for the agent.
6. Click OK.

Finding Users in the Company Directory

This chapter describes how to use the company directory to find and call someone in your company, even if you do not know the extension number. For more information about searching and sorting techniques, see [Appendix B, "Searching and Sorting Tips."](#)

This chapter includes the following topics:

- [Accessing the Company Directory](#)
- [Calling a User](#)
- [Finding and Calling a User Quickly](#)
- [Finding Everyone in a Department or Group](#)
- [Finding a User Using the First or Last Name](#)
- [Finding Users](#)
- [Finding Additional User Information](#)
- [Clearing the Results of a Contact Search in the Company Directory](#)

Accessing the Company Directory

Complete the steps in the following procedure to access the company directory.

To access the company directory

1. From the Toolbar, click the Directory link.

The Company Directory dialog box opens, showing the name, department, phone extension, and ACD status of the other users for the company that you signed in to.

Note: Before you call an agent, check the agent's status. You might not want to make a call if the agent is currently on an ACD call or On Break.

2. Find a user from the Department or Filter boxes.

For more information on finding users, see:

- ["Finding and Calling a User Quickly"](#) on page 5-2.
- ["Finding Everyone in a Department or Group"](#) on page 5-3.
- ["Finding Users"](#) on page 5-4.
- ["Finding Additional User Information"](#) on page 5-5.

Calling a User

After finding users in the company directory, you can call them from the Directory List page, or from the View User screen.

Calling from the Directory List

You can call a person using the directory list.

To call from the directory list

1. Double-click the user that you want to call.
2. Double-click a project.

If billing projects are configured, a Billing Project window opens for you to select a project to bill. Interaction Manager rings your extension. The user's name and extension that you dialed appear in the Interaction Control Bar.

Calling from the View User Screen

If you choose to view the user's information page before making the call, complete the steps in the following procedure.

To call from the View User screen

1. Select the user from the Directory List, and then click the View icon.

The View User screen opens.

2. From the View User screen, click the underlined extension number or the Dial icon.
3. If Billing Projects is configured, a Billing Project window opens for you to select a project to bill. Double-click a project.

Interaction Manager rings your extension. The user's name and extension that you dialed appears in the Interaction Control Bar.

Finding and Calling a User Quickly

To find and call a user quickly, complete the steps in the following procedure.

To find and call a user quickly

1. From the Department list, select a department or All.

All specifies everyone in the company. You can use filter searches and pagination controls to quickly locate members of the directory.

Note: The Filter field and pagination controls appear when the directory contains more than 51 listings.

2. Begin typing the user's first or last name in the Filter box.
3. In the Filter box, you can filter all five columns.

Matches appear on the page. The Filter box supports multiple field searches. So, for example, if you begin typing the user's first or last name in the Filter box, then matches appear on the page. You can also find someone where the letter *C* begins one field, and the letter *B* begins another field.

Note: The filter is not case sensitive, but you must spell the name correctly. You cannot use an asterisk (*) as a wildcard character in the Filter box.

Tip: Click a column heading to sort the list of results.

4. Double-click the user that you want to call.

Notice that the Connect To Server button (in the Actions list) changes to Hang Up as the number dials. If required, the Billing Project window opens for you to select a project to bill.

5. Double-click a project.

Interaction Manager rings your extension. The user's name and extension that you dialed appear in the Interaction Control Bar.

Finding Everyone in a Department or Group

The first search dialog box displays departments (or other groups), depending upon your configuration. For more information about searching and sorting techniques, see [Appendix B, "Searching and Sorting Tips."](#)

To find everyone in a department or group

1. From the Department list, select a department (or group name).
2. In the Filter box, begin typing the user's first or last name.

Matches appear on the page.

Note: The filter is not case sensitive, but you must spell the name correctly. You cannot use an asterisk (*) as a wildcard character in the Filter box.

Tip: Click a column heading to sort the list of results.

3. Select the user (by clicking the row):
 - a. To call the user, click the Dial icon.
 - b. To find more information (such as home phone, work phone, email address), click the View User icon.

Finding a User Using the First or Last Name

If you know the user's first or last name, you can use the Find User icon to find information about the user.

To find a user using a first or last name

1. From the Department list, select the user's department. If you are not sure, select All.
2. Click the Find User icon.

The Find User form opens.

3. Type the first or last name in the appropriate box.

Tip: You can use an asterisk (*) as a wildcard character.

4. Click Find.

The Company Directory List reappears, showing a list of matching users. You can call the user or view more contact information by clicking one of the icons.

Finding Users

There are many ways to find another user. Some examples are detailed in the following topics:

- ["Finding a User from a List of Names"](#) on page 5-4
- ["Finding Users Whose Last Name Begins with A"](#) on page 5-4
- ["Finding Users with a Phone Extension Ending in 45"](#) on page 5-4

Finding a User from a List of Names

You can find users from a list of names in a department.

To find users from a list of names

1. From the Department list, select All.
2. In the Filter box, begin typing the user's first or last name.
Matches appear on the page.

Tip: Click a column heading to sort the list of results.

3. Click to select the user, and then click the View icon.
All known information about the user appears.

Finding Users Whose Last Name Begins with A

As an example, you can find a user whose last name begins with an A.

To find a last name beginning with A

1. From the Department list, select All.
2. Click the Find User icon.
The Find User form opens.
3. In the Last Name box, type A* and click Find.

The Directory List reappears showing all users whose last name begins with A.

Finding Users with a Phone Extension Ending in 45

If you know the last two digits of a user's phone extension, you can find the user. In this example, the last two digits of the extension are 45.

To use a partial phone extension number to find users

1. Click the Find User icon.
The Find User form opens.

2. Type *45 in the Extension box, and click Find.

The Directory List reappears showing all users whose extension ends with 45.

Finding Additional User Information

From the View User screen, you can find more information about a user, such as a home phone number, work phone, email address, and so on.

To find more user information

1. Find the user in the company directory, using one of the search methods.

For more information on finding users, see ["Finding Users"](#) on page 5-4.

2. Double-click the user that you want from the search results list.

The View User screen opens to show all known contact information for that user.

3. Click the Back to List link to return to the company directory.

Clearing the Results of a Contact Search in the Company Directory

After performing a contact search for users in the company directory and the results display in the Company Directory screen, to perform a new search, you must clear the results of the search. Complete the steps in the following procedure to clear the results of the contact search.

To clear the results of the contact search in the company directory

1. From the toolbar, select the Company Directory link.

Note: You can also search for a contact from an interaction.

2. Perform a search in the Contact Find screen.

A list of all contacts in the Oracle Contact On Demand database that match the fields you completed appears in your workspace.

3. After viewing the search results, Click Clear to manually clear the contents of the search criteria.

Note: The data values in all fields will be cleared, with the exception of the Country field. The Country field will default to the country that is defined for the company.

Managing Your Agent Status and Statistics

This chapter explains the importance of your status, how and when to change your status, and how to view real-time statistics about your activity while working in Interaction Manager. This chapter includes the following topics:

- [Your Status in Interaction Manager](#)
- [Controlling Your Status](#)
- [Viewing Your Statistics](#)
- [Viewing Real-Time Statistics](#)

Your Status in Interaction Manager

Interaction Manager sends interactions to agents with an Available status.

Note: Always refer to your Agent Status (on the Toolbar) to monitor your status so that you are available to receive interactions.

Interaction Manager tracks the time from when you receive an interaction to when you accept it. Furthermore, you have a maximum amount of time, which is the call time-limit, to answer an interaction. The call time-limit is set by your system administrator. If you do not accept an interaction within your call time-limit, Interaction Manager changes your status to No Answer, and returns the interaction to the queue for the next available agent.

Caution: Interaction Manager will not send you any more interactions until you manually change your status back to Available.

[Table 6-1](#) shows the agent statuses:

Table 6-1 Agent Statuses

Status	Description
Available	<p>If you are not handling an interaction, and you are ready to accept a new interaction, Available appears in the Status box.</p> <p>Normally, Interaction Manager automatically resets your status to Available each time that you finish an interaction. However, sometimes you might want to select the Available status, so that Interaction Manager sends you a new interaction. For more information on statuses, see "When to Select Available" on page 6-2.</p>

Table 6–1 (Cont.) Agent Statuses

Status	Description
Last Call	Select Last Call to indicate that you will not accept any more interactions after you complete the one that you are currently handling.
On Break	Select On Break to indicate that you are not available to receive any interactions.

Note: Your administrator might have added more statuses that control your availability (such as At Lunch, In Meeting, In Training). Contact your administrator for descriptions of the custom statuses that are not provided in [Table 6–1](#).

Controlling Your Status

You can control your status and your availability for accepting or refusing incoming interactions. For example, if you want to leave your station for lunch, a break, or if you need time after a recently concluded interaction, you can make yourself temporarily unavailable for new interactions. You can also accept an interaction, and then change your status to Available, so that Interaction Manager will automatically route a new interaction to you (allowing you to handle multiple interactions).

Note: Interaction Manager routes calls only to agents who are Available.

By selecting different statuses, you can control your work load in the following ways:

- **Available.** Select Available to let Interaction Manager know that you are ready to receive a new interaction.
- **Last Call.** Select Last Call to indicate that you are not to receive any more calls after finishing the current interaction.
- **Custom Status.** Select a custom status that was created just for your contact center.

When to Select Available

Generally, your status automatically returns to Available when you finish an interaction. However, sometimes you might want to manually select Available to change your status. For example, if you are away from your desk and your status is still Available, Interaction Manager might offer you an interaction. If you do not accept the interaction in the allowable time, Interaction Manager changes your status to No Answer and offers the interaction to another agent.

When you return to your desk, you must select Available to let Interaction Manager know that you are ready to accept interactions.

Note: You must select Available to handle more than one phone interaction at the same time. For more information on managing multiple interactions, see "[Accepting Multiple Interactions](#)" on page 16-1.

When to Select Last Call

When you are going to be away from your computer for a while, select Last Call to let Interaction Manager know that you are not available to accept any more interactions. Do one of the following:

- If you are not handling an interaction at the time that you select Last Call, Interaction Manager will not offer you an interaction until you manually change your status back to Available.
- If you are handling an interaction when you select Last Call, complete the interaction as you normally would. When you finish the interaction, leave your workstation. Interaction Manager will not offer you another call until you manually select Available.

When to Select a Custom Status

Your administrator can create custom statuses for your contact center (such as Internal Meeting, Training, and so forth) to be more specific about what you are doing. However, no matter what custom status appears in your Toolbar, Interaction Manager determines your status as one of the following:

- **Available.** Available to accept interactions.
- **Busy.** Not available to accept interactions.
- **On Break.** Not available to accept interactions.

Note: You might see a No Answer status if you do not accept a workgroup interaction within the call time-limit. Interaction Manager treats No Answer in the same way as On Break.

Viewing Your Statistics

The My Statistics tab shows the following information:

- Your name, user name, email address, telephone number, and extension number.
- Real-time statistics about your activity while logged in to Interaction Manager. The statistics include your Daily Totals, Media Statistics, and Things to Do list.

Note: The specific items that you see might vary, depending upon your company's projects and settings.

Viewing Real-Time Statistics

Real-time statistics are current up to the time displayed in the lower-left corner of the workspace area.

To view real-time statistics

- From the Sidebar, click My Statistics.

Your real-time statistics appear in the workspace area of your screen. For more information on daily total statistics, see [Table 6-2](#) for a description of Daily Totals.

Daily Totals

The Daily Totals area shows the following information:

- How long you were working in Interaction Manager (from when you logged in until midnight)
- The time you spent in each status
- How long you took (on average) to answer interactions
- The number of offline messages that you managed

[Table 6–2](#) provides a description for each column in the Daily Totals area.

Table 6–2 *Daily Totals*

Column	Description
Logged in for	The total amount of time that you were logged in to Interaction Manager since 12:00 A.M. today. This timer starts when you log in and stops when you log out. It is reset every day at midnight.
Available	How long you have been in the Available state since 12:00 A.M. today.
Busy	How long you have been in the Busy state since 12:00 A.M. today.
On Break	How long you have been in the On Break state since 12:00 A.M. today.
Talk Time	The average time you spent talking on the phone since 12:00 A.M. today.
Time to Answer	How quickly, on average, you accepted ACD interactions since 12:00 A.M. today.
Average Speed of Answer	How long, on average, ACD interactions waited in a queue before being answered.
Average Handle Time	How much time, on average, that you spent handling ACD interactions since 12:00 A.M. today (including queue time and wrap up time).

Note: Interaction Manager displays the time in hours:minutes:seconds, and performs updates every 15 minutes.

Media Statistics

Media Statistics tell you how many interaction types that you accepted since 12:00 A.M. today. For example, if Web Callback displays 4, it means that you accepted four Web Callback interactions since 12:00 A.M. today.

[Table 6–3](#) shows the interaction types.

Table 6–3 *Interaction Types*

Interaction Type	Description
Callbacks	An ACD callback occurs when a caller chooses to leave a message rather than continue to wait in a queue for the next available agent. For more information on callback interactions, see " Accepting ACD Callbacks " on page 12-1.
Chat	Interaction Manager supports both Web-based chat and intelligent chat. Web-based chat is the real-time communication between two users. Intelligent chat uses keyword matching to find recommended chat responses. For more information on chat interactions, see " About Receiving a New Chat Interaction " on page 9-1.
In Extension	Calls that you receive from another extension at your company. For more information on extensions, see " Making an Internal (Extension) Call " on page 18-2.

Table 6–3 (Cont.) Interaction Types

Interaction Type	Description
Inbound	Calls that come from outside the company directly to your phone. For more information on inbound interactions, see "Accepting Calls" on page 7-1.
Out Extension	Calls that you make to another extension at your company. For more information on extensions, see "Making an Outbound Call" on page 18-1.
Outbound	Calls that you make to numbers outside the company. For more information on outbound interactions, see "Making an Outbound Call" on page 18-1.
Preview	The agent selects a project and instructs Oracle Contact On Demand to dial a customer number. For more information on preview interactions, see "Making Preview Calls" on page 14-1.
Voice Mail	A voice mail interaction is a voice mail that is left for the workgroup and distributed to an agent within the workgroup. For more information on voice mail interactions, see "Personal Voice Mail and Missed Calls" on page 11-1.
Web Callbacks	A Web callback occurs when a customer requests to speak to an agent while visiting a Web site. For more information on Web callback interactions, see "Accepting Web Callbacks" on page 12-2.
Workgroup Calls	A workgroup call is an inbound call that is distributed to a workgroup agent. For more information on workgroup call interactions, see "Accepting Calls" on page 7-1.
Workgroup Email	A workgroup email is an email that is distributed to an agent within a workgroup. For more information on workgroup email interactions, see "Accepting an Email Interaction" on page 13-1.
Workgroup Fax	A workgroup fax is a fax interaction that is distributed to an agent within a workgroup and arrives as an email. For more information on workgroup fax interactions, see "Accepting a Fax Interaction" on page 15-1.

Printing My Statistics

You can print your statistics if you have a printer connected to your computer.

To print statistics

1. Click Print my Statistics.
2. In the Printer dialog box, select a printer and the printing options.

Managing Phone Interactions

This chapter explains the basic phone interactions (such as receiving calls, working on- or off-hook, transferring calls, recording calls, placing a caller on hold, sending a caller to voice mail, ending a call, and so on). This chapter includes the following topics:

- [Accepting Calls](#)
- [Off-Hook and On-Hook Interactions](#)
- [Call Transfers](#)
- [Clearing Search Criteria when Transferring a Call](#)
- [Recording Calls](#)
- [Disabling Recording](#)
- [Placing a Caller on Hold](#)
- [Sending a Caller Directly to Voice Mail](#)
- [Enabling Call Trace](#)
- [Ending a Call](#)
- [Assigning an Outcome](#)
- [About Wrapping-Up an Interaction](#)
- [Optional Hook Flash Feature](#)

Note: Interaction Manager sends you interactions only if your status is Available. Therefore, make sure to reset your status to Available when you are ready to accept a new interaction.

Accepting Calls

You can make and receive two basic types of phone calls:

- **Automatic Call Distributor (ACD) Calls.** This type of call occurs when a person dials a number associated with your contact center, and the call is routed to you. ACD calls include:
 - Customer initiated call
 - Web callbacks and ACD callbacks
- **Non-ACD Calls.** This type of call occurs when the person is making a direct call to your phone number. Non-ACD calls include:

- Direct Inbound Calls are calls that come from outside the company directly to your phone.
- Direct Outbound Calls are calls that you make to numbers outside the company.
- Inbound/Outbound Extension Calls are calls that you make to, or receive from, other extensions at your company.

Note: If you do not accept the ACD interaction within the number of rings to answer the call setting, Interaction Manager changes your status to No Answer, and returns the interaction to the queue for the next available agent.

Receiving an ACD Call

When you receive a new ACD call, the caller's information, if available, appears in the Interaction Control Bar.

To receive an ACD call

1. Click the Accept icon.

The Contact Information tab opens, showing contact information, if available.

Note: Upon acceptance of an interaction, the interaction control is automatically minimized. If you want to view the interaction detail or act upon the interaction, you can use the mouse to hover over the interaction to expand it.

2. Pick up your phone, and begin speaking.

The workspace opens to show the Interaction Information tab.

3. Verify and complete the information.

If this is an existing contact, Oracle Contact On Demand displays the contact's name prominently in the Interaction Control Bar.

- a. Click the Contact History tab to view all previous interactions for this contact.

For more information on using and understanding Interaction History, see ["Accessing Interaction History Information"](#) on page 10-1.

- b. If you have a script, from the Sidebar, click Outbound Preview.

For more information on scripts, see ["Reading and Loading Scripts"](#) on page 14-3.

Note: If the contact does not already exist, then Unknown appears in the place of the contact's name, and you must enter new contact information, or select a contact from a list of possible matches. For more information about locating contacts, see ["Finding Contact Records"](#) on page 17-1.

Retrieving an ACD Voice Mail from an Interaction History Record

One way to retrieve an ACD voice mail message is from the interaction history record.

To retrieve an ACD voice mail from interaction history

1. Find the contact.

For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

2. View the Contact History.

For more information on viewing contact history, see ["Viewing Contact History for a Current Interaction"](#) on page 17-7.

3. Double-click an interaction record to open it.

A hyperlink to a voice mail appears as an entry in the interaction record.

4. Click the Open Voice-mail hyperlink.

Interaction Manager opens your media player and the voice mail begins to play.

Note: It might take some time for your media player to open.

Off-Hook and On-Hook Interactions

You can accept a new call interaction while working off-hook or on-hook:

- **Working Off-Hook.** You are most likely using a headset, and you connect to Oracle Contact On Demand once. Instead of picking up the phone each time an interaction arrives, click the Accept icon in the Interaction Control Bar.
- **Working On-Hook.** You answer the physical phone each time that it rings.

When you receive a new phone interaction, Interaction Manager displays the caller's phone number, if available, in the Interaction Control Bar in an active call window.

Note: If you do not accept the interaction within the number of rings to answer the call setting, Interaction Manager changes your status to No Answer, and returns the interaction to the queue for the next available agent. The setting for ACD callback and Web callback interactions is 1 minute.

The On-Hook or Off-Hook phone status icon appears at the lower left of the side bar.

Accepting a Phone Interaction While Working Off-Hook

You can accept phone interactions while working off-hook.

To accept phone interactions while off-hook

1. After logging in to Interaction Manager, click the Actions link, and then click Connect to Server.

The off-hook icon appears in the Bottom Bar area, indicating that you are working off-hook and are ready to accept a new call. When a call arrives, Interaction Manager sounds a beep, and displays the Active Call window in the Interaction Control Bar.

2. Click the Accept link and begin speaking.
 - If the phone number is already in Oracle Contact On Demand along with the contact information, Oracle Contact On Demand automatically retrieves the

contact's name and displays it in the Interaction Control Bar. If Oracle Contact On Demand cannot find the contact, the word *Unknown* appears instead, reminding you to create a new contact or find a match from a list of possibilities. For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

- Notice that the following action icons are available:
 - **Hold.** Places the caller on hold.
 - **Disconnect.** Hangs up the telephone.
 - **Transfer.** Routes a call to an agent, workgroup, or an external number.
 - **Voice Mail.** Sends the caller directly to voice mail.
 - **Conference.** Allows you add more people to a call.
 - **Recording.** If recording is configured, you can record the interaction.
 - **Mute.** Prevents the caller from hearing you.

What Happens Each Time a New Phone Call Arrives?

Each time a new phone call arrives, these events occur:

- A New Call window appears in the Interaction Control Bar.
- The orange color identifies the call as new.
- The Accept link is available in the New Call window.
- The phone line status (in the Bottom Bar) displays a Ringing icon.

Accepting a Phone Interaction While Working On-Hook

You can accept a phone interaction when you are working on-hook. When you accept the interaction:

- The orange New Call window changes to a blue Active Call window.
- Action icons (Hold, Disconnect, Transfer, Voice Mail, Conference, and Mute) become available.
- The caller's information (such as name, phone number, priority, and so on) appears in the window (if known). If the caller is not known, Interaction Manager displays Unknown in the place of the caller's name.

To accept phone interactions while working on-hook

1. Click the Accept link in the New Call window.
2. Begin speaking.

Call Transfers

You can transfer an active call to another user, or to an external phone number using one of the following options:

- Transfer
- Supervised transfer
- Warm transfer

Note: When transferring a call to another user, look at the information in the Status column of the Transfer To dialog box to determine the current state of the user. For more information on transferring calls to another user, see ["Transferring to an Internal \(Extension\) Call"](#) on page 7-5.

[Table 7-1](#) describes the types of transfers.

Table 7-1 Types of Call Transfers

Transfer Type	Description
Transfer	Transfer an active call directly from yourself to someone else (another user or external number), which is sometimes called a <i>blind transfer</i> or <i>cold transfer</i> .
Supervised Transfer	Use a supervised transfer to speak to the person who is to receive the transferred active call without the caller hearing you. In this way, you can provide the caller's name and other useful information.
Warm Transfer	<p>Use a warm transfer to conference everyone, including you, the active caller, and the person to whom you are transferring the call (such as Agent 2). In this way, you can stay on the line as long as necessary.</p> <p>In addition, you can click the Leave button to remove yourself from the conference, and let the caller and Agent 2 continue talking.</p> <p>Note: When you are already in a conference, the only options are to remove yourself from the conference, or disconnect.</p>

Note: You can view the interaction history from the Contact History Tab, which includes the external history if a call was transferred to an external number. You can view the external history for inbound calls that were transferred to an external number, supervised transfers to another interaction, project menus that routed the call interaction to an external number, and campaigns that routed the call to an external number. For more information on viewing call history, see ["Viewing Interaction History"](#) on page 10-1.

Transferring to an Internal (Extension) Call

Complete the steps in the following procedure to transfer a call from an internal extension.

To transfer to an internal call

1. From the Active Call window in the Interaction Control Bar, click the Transfer icon.

The Transfer To box opens.

2. Find and select a user from the list.

For more information on locating users, see ["Finding Users"](#) on page 5-4.

3. Click the Transfer icon.

Oracle Contact On Demand transfers the call and the interaction disappears from the Interaction Control Bar.

Transferring to Another User, Group (Workgroup), or an External Number

You can transfer an outside call to another user or workgroup from the Active Call window in the Interaction Control Bar.

To transfer an outside call to another user or workgroup

1. Click the Transfer icon.

The Transfer To box opens, providing a User tab, a Workgroup tab, and an External Number tab.

2. Click the Workgroup tab.

A list of workgroups appears that belong to the company.

Tip: You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a country selection box, and a box where you type the outside phone number. You can view the interaction history for the external call transfer from the Interaction History Tab and Contact History Tab. For more information on viewing call history, see ["Viewing Interaction History"](#) on page 10-1.

3. Find and select the workgroup that you want.

4. Click the Transfer icon.

If required, the Outcomes box appears, providing a list of outcomes. In addition, the Active Call window turns gray and displays Selecting Outcome.

- a. Select an outcome, and click Select.

The active area displays Wrap-up, if the wrap-up time is longer than the selected outcome time.

- b. Click the End Wrap-up icon.

The active call area for this interaction closes.

Using a Supervised Transfer

Use a Supervised Transfer to speak to the person who is to receive the transferred call without the caller hearing you. In this way, you can provide the caller's name and other useful information.

To use a supervised transfer

1. From the Active Call Window in the Interaction Control Bar, click the Transfer icon.

The Transfer To box opens.

2. Select the User tab.

Tip: You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a country selection box, and a box where you type the outside phone number. You can view the interaction history for the external call transfer from the Interaction History Tab and Contact History Tab. For more information on viewing call history, see ["Viewing Interaction History"](#) on page 10-1

3. From the list of users, find and select a user from the list.

For more information on locating users, see ["Finding Users"](#) on page 5-4.

4. Click the Supervised Transfer icon.

Oracle Contact On Demand places the original call on hold, and a box appears showing the name of the person on hold and the name of the person being connected, together with a progress bar.

When Oracle Contact On Demand makes the connection, the box refreshes to show the caller still on hold, but the person to whom you transferred the call is Active, and the Complete button becomes available.

5. Tell the person who is receiving the call any information about the caller, which might be useful, and click Complete.

Interaction Manager transfers the call, the box closes, and the interaction no longer appears in your Interaction Control Bar or workspace.

Using a Warm Transfer

Use a warm transfer to conference everyone, including yourself, the caller, and the person to whom you are transferring the call (such as Agent 2). In this way, you can stay on the line as long as necessary. In addition, you can click Leave to remove yourself from the conference and let the caller and agent 2 continue talking.

To use a warm transfer

1. From the Active Call window, click the Transfer icon.

The Transfer To box opens.

2. Select the User tab.

You can also select the External Number tab to transfer the call to an outside number. The External Number tab provides a country selection box, and a box where you type the outside phone number.

3. Find and select a user from the list, such as Agent 2.

For more information on locating users, see ["Finding Users"](#) on page 5-4.

4. Click the Warm Transfer icon.

Oracle Contact On Demand places the original caller on hold. A box appears showing the name of the caller on hold and Agent 2 along with a connecting progress bar.

When Oracle Contact On Demand makes the connection to Agent 2, the box refreshes to show the caller still on Hold, but Agent 2 is Active, and the Combine button becomes Available. You can talk to Agent 2, without the caller hearing your conversation, and look at all the available interaction information.

5. Click Combine.

The caller's ID appears on the screen of Agent 2 and everyone can talk in conference. The box refreshes to show that both the caller and Agent 2 are Active. In addition, a Leave button appears.

6. If you want, click Leave to disconnect yourself from the conference.

Agent 2 and the caller still remain connected in the conference.

Clearing Search Criteria when Transferring a Call

When attempting to transfer a call and you want to find the user, depending on the result of your query, it might be necessary to repeat the search process. Use the Clear option to clear the fields and the search criteria. Complete the steps in the following procedure to clear the search criteria when transferring a call.

To clear search criteria

1. From the Transfer to window, select the User tab.
2. Perform a search in the Find screen.

A list of all users in the Oracle Contact On Demand database that match the fields you completed appears in your workspace.

3. After viewing the search results, Click Clear to manually clear the results of the search criteria.

Note: The data values in all fields will be cleared, with the exception of the Country field. The Country field will default to the country that is defined for the company.

Recording Calls

If the call recording functionality is configured in Interaction Manager, you can record any incoming ACD call, using the Start Recording icon in the Active Call Window. You can, for example, record a call to confirm a transaction.

Note: Oracle Contact On Demand can be configured to allow recording when a contact is not assigned. If so, the recording action is available from the interaction control.

Caution: You can record only incoming ACD calls. Oracle Contact On Demand does not allow the recording of internal calls or extension calls.

To record calls

1. From the Active Call window, click the Start Recording icon.

The telephone icon includes a picture of a tape and the Stop Recording icon replaces the Start Recording icon.

When you want to stop recording, click the Stop Recording icon.

Disabling Recording

When Disable Recording is selected, a transaction recording, quality recording, or call trace (emergency recording) immediately stops.

To disable recording

1. From the Active Call window in the Interaction Control Bar, click the Interaction list
2. Select Disable Recording.

Finding a Previously Recorded Interaction

You can find a previously recorded interaction by accessing the Contact History tab or the Interaction History tab from the Sidebar. For more information about using these tabs, see ["Managing Contacts"](#) on page 17-1 and ["Viewing Interaction History"](#) on page 10-1.

Placing a Caller on Hold

Complete the steps in the following procedure to place a caller on hold.

To place a caller on hold

1. In the Active Call window click the Hold hourglass icon, or click the arrow, and then select Hold from the list.
While on hold, and if your system is configured for it the caller might hear music.
2. Check if the caller is on hold by looking for the following changes to the call window:
 - The Active Call window changes to the On Hold Call window.
 - The color of the window changes from blue to gray.
 - The telephone icon changes to show a phone plus an hourglass.
 - A green check mark (active) appears in place of the Hold icon.
 - The list changes from Hold to Make Active.
3. To take the call off hold and make it active again, click the Active icon (green check mark).

Sending a Caller Directly to Voice Mail

You can send a caller immediately to voice mail.

To send a caller to voice mail

1. Click the Voice-mail icon in the Active Call window.
Alternatively, you can click the arrow, and then select Voice Mail from the list.
2. Check to determine if Interaction Manager sent the caller to voice mail by looking for the following changes to the call window:
 - The Active Call window changes to the Voice Mail window.
 - The color of the window changes from blue to gray.
 - The Voice-mail icon is no longer an option.
 - A green check mark (active) appears in place of the Disconnect icon.
 - The list no longer has a Voice-mail option.
3. To make the call active again before the caller hangs up, click the Active icon (green check).

Enabling Call Trace

The Call Trace functionality allows you to initiate a call trace for emergencies. The call trace feature also activates recording.

To enable call trace

1. From the Interaction list, select Call Trace.

The menu option text turns red, showing that Call Trace is active.

2. Click Yes to confirm the message: *Are you sure?*

The recording begins. A Phone icon appears with a red dot next to the phone, flashing alternately with the white magnifying glass in the center. When the trace has been successfully sent, the flashing stops.

Note: If the caller asks not to be recorded, click Disable Recording from the Interaction Control list. Interaction Manager immediately stops the recording.

Ending a Call

There are a number of methods that you can use to disconnect a call.

End a call using one of the following methods:

- Click the Disconnect icon in the Active Call window.
- Click Disconnect from the list.
- Select the Active Call window, and then select Hang-up from the Action list.

Assigning an Outcome

In some cases, you might be required to assign an outcome to an interaction after you finish with the caller. An outcome describes the result of a call or callback. Example outcomes include Sale, Request for Literature, Request for Product Change, and so on.

If you are required to assign an outcome, then the Active Call window automatically changes to the Selecting Outcome window after you disconnect the interaction.

Unless you have more wrap-up time, both the Selecting Outcome window and the Outcomes dialog box disappear after you select an outcome.

About Wrapping-Up an Interaction

Your administrator can configure Oracle Contact On Demand to give you a specific amount of wrap-up time after each interaction to take care of various tasks before Interaction Manager is allowed to send you another phone interaction. This wrap-up time is used to complete different tasks, such as updating a form, making sure a contact record exists, and so on.

Note: Wrap-up time is optional and not used by all contact centers. Ask your supervisor or administrator if your contact center uses wrap-up time and how much time you have.

Wrap-up begins when you finish the call, and the contact hangs up. When wrap-up begins:

- The call window changes to Wrap Up.
- The color changes from blue to gray.

- The only available action item is End Wrap-up.

While you are in wrap-up mode, Interaction Manager interprets your status as Busy even though your displayed status might be Available. When the wrap-up ends, Interaction Manager automatically changes your status to Available.

When your wrap-up time reaches its limit, the window disappears. Interaction Manager can then send you a new interaction from the queue, if one exists.

Note: If you are configured to handle multiple interactions, while you are in wrap-up mode, Interaction Manager might send an offline interaction (such as chat or email).

If you finish before your time limit, you can click the End Wrap-up action to immediately become available for new phone interactions. The timer starts when the interaction ends or immediately after you select an outcome. The timer starts at zero and counts up.

If, however, you are creating or updating a contact, and you or the customer disconnects before you finish, wrap-up automatically begins. Oracle Contact On Demand prompts you to save your work and stop, or continue entering information.

Wrapping Up an Interaction

This procedure describes how to wrap up an interaction.

Wrapping up an interaction

1. When you finish adding information, click End Wrap up,
2. Click Remove.

The interaction is removed from the Interaction Control Bar.

Optional Hook Flash Feature

Hook Flash is a telephone feature that simulates a quick on-hook, off-hook cycle. This feature is usually the functional equivalent of quickly hanging up and lifting the receiver on an old style phone. Most modern telephones implement this feature with a button.

If your system is configured to use the Hook Flash feature, then you can do the following, as long as you have an Modular Station Interface (MSI) or High-Density Station Interface (HDSI) phone:

- Make an extension call
- Make an outbound call
- Retrieve voice mail
- Place a call on hold
- Place a call in conference
- Transfer a call

When you pick up the phone to make a call, a menu plays. The menu indicates the following:

You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voice mail, press the asterisk () key.*

Note: When you dial out, you must include the area code after pressing 9.

When using Hook Flash, click the Flash button on the phone, or hang up the phone for a second:

- If you press the Flash button during a call, the person on the line is placed on Hold, and the standard Hook Flash menu plays:

You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voice mail, press the asterisk () key.*

- If you press the Flash button while connected to two people, the following menu plays:

Press 1 to connect the first held party. Press 2 to connect the second held party. Press 3 to conference the parties on hold. Press 4 to transfer connect the parties on hold.

Creating and Joining Conference Calls

This chapter describes how to create and join a conference call. It includes the following topics:

- [Creating a Conference](#)
- [Exiting a Conference](#)
- [Joining a Conference](#)
- [Removing a Caller from a Conference](#)
- [Inviting a Caller Back to a Conference](#)
- [Muting and Unmuting Your Workstation](#)

Creating a Conference

Conference calls allow several people to communicate simultaneously. When you create a conference, you can exit the conference to answer other calls, then return to the conference, or exit permanently while the other participants continue speaking. Each user is allowed to create a conference. The number of members is limited by the Oracle Contact On Demand configuration.

Note: Before you can create a conference, you must have at least one active interaction.

To create a conference

1. Select the caller whom you want to add to the conference.
2. From the Active Call window in the Interaction Control Bar of the person you called (or who called you), click the Conference icon.

The following events occur:

- The Active Call window changes to display Conference (first in gray, and then in blue).
- Exit, Disconnect All, and Mute become available.
- The number of participants appears as 1, and you and the caller can hear each other.

Adding Multiple Callers to a Conference

You can add a number of callers to the conference.

To add multiple callers to a conference

1. Create a conference, and then call another prospective conference participant using the Dialer or the company directory.

The first Active Call window moves to the right, and then a New Active Call window appears, showing the name of the second person you called. For more information on conferencing, see ["Creating a Conference"](#) on page 8-1.

2. Click the Conference icon from the Active Call window of the new call.

The following events occur:

- The new Active Call window changes to display Conference (first in gray and then back to blue).
 - Exit, Disconnect All, and Mute become available.
 - The number of participants appears as 2, and all three participants can hear each other.
3. Do one of the following:
 - Click anywhere in the Conference box to open the Conference tab in your workspace, which displays each participant's name and phone number.
 - Click the Conference box down arrow to view each participant's name and phone number.

Note: Use the scroll bar, or click and drag the participant's dialog box border to expand the size of the dialog box to see all information.

Exiting a Conference

When you are in a conference call, the Interaction Control Bar displays a Conference window showing the number of participants.

Note: To view the person who started the call, click anywhere in the Conference window. The Interaction Information tab opens in your workspace to show you information about the person who started the conference.

You can exit a conference as follows:

- You can exit a conference that you started.
- You can exit a conference that you did not start.

Exiting a Conference That You Started

You can exit a conference that you started.

To exit a conference

1. From the Conference window, click the Exit link:

The Conference box appears gray to indicate you are no longer in the conference. The number of participants still appears in the gray box and the available links change to Join and Disconnect All.

2. Click anywhere in the gray Conference box to open the Conference tab in your workspace, where you can still see who is in conference and their phone numbers.

Exiting a Conference That You Did Not Start

You can exit a conference started by another caller.

To exit a conference

- From the Active Call window, click the Disconnect icon, or select the down arrow, and then Disconnect.

Joining a Conference

If you started the conference and then exited it, you can reenter (rejoin) by selecting the Join icon. After you exit your conference, the Conference box turns gray, shows the number of participants, and displays a Join icon and a Disconnect All icon.

Note: You can join a conference only if you were invited by the person who started the conference.

To join a conference

- Click the Join icon.

The Conference box turns blue, and the available icons are Exit, Disconnect All, and Mute.

Removing a Caller from a Conference

In some cases, you might want to have a private conversation with a conference call participant without disturbing the rest of the parties on the call. You can remove a caller from a conference in two ways:

- From the Conference Call window
- From the Conference tab, which appears in your workspace

Note: You can remove a caller only from a conference that you started.

Removing a Caller Using the Conference Call Window

Complete the steps in the following procedure to remove a caller using the conference call window.

To remove a caller

1. From the Conference Call window in the Interaction Control Bar, click the arrow.
A box displaying the names and phone numbers of all call participants appears.

Tip: Use the scroll bar, or click and drag a box border to expand the box to display all information.

2. Select the person whom you want to remove from the conference, and click either the Pull-Out or Disconnect icon:

- a. Click Pull-out to remove the participant from the conference, but keep the connection so that the participant can rejoin the conference.
- b. Click Disconnect to remove the participant from the conference, and close the connection, so that the participant cannot rejoin the conference.

Interaction Manager removes the person from the conference.

Removing a Caller Using the Conference Tab

You can remove a caller from a conference you have started, using the Conference tab in your workspace.

To remove a caller

1. From the Conference tab, select the person whom you want to remove from the list of participants.
2. Do one of the following:
 - Click Pull-out to remove the participant from the conference, but keep the connection so that the participant can rejoin the conference.
 - Click Disconnect to remove the participant from the conference, and close the connection, so that the participant cannot rejoin the conference.

Interaction Manager removes the person from the conference.

Removing All Callers from the Conference

You can remove all participants from a conference.

To remove all callers

- From the Conference Call window in the Interaction Control Bar, click the Disconnect All link.

Interaction Manager removes everyone from the conference, and closes the Conference box and tab.

Inviting a Caller Back to a Conference

You can invite a removed conference participant back to the conference call.

To invite a caller back to a conference, do one of the following

- If you selected Pull-Out to remove a conference participant from a Conference call, then click the Conference icon to add the caller to the conference again.
- If you selected Disconnect to remove a conference participant from a Conference call, then you must first dial the caller again to establish a connection to add the caller to the conference again.

Muting and Unmuting Your Workstation

Sometimes, during a conference, you might want to block out background noise, which can be distracting to others. You can use the Mute feature.

To mute your workstation

- From the Active Call window in the Interaction Control Bar, click the Mute icon.

The Mute icon changes to Unmute, and other listeners can no longer hear any background noise.

To unmute your workstation

- In the Active Call window in the Interaction Control Bar, click the Unmute icon.
The Unmute icon changes to Mute, and the callers can hear you speaking.

Managing Chat Interactions

This chapter describes how to handle Web-based chat and intelligent chat interactions. It includes the following topics:

- [About Receiving a New Chat Interaction](#)
- [Accepting a Chat](#)
- [Sending a Chat Text Message](#)
- [Using Chat Cobrowsing](#)
- [Pushing a Predefined Web Address](#)
- [Pushing a Unique Web Address](#)
- [Sending a Prepared Response](#)
- [Receiving a Chat from Your Supervisor](#)
- [Transferring a Chat to Another Workgroup or Agent](#)
- [Ending a Chat Session](#)

About Receiving a New Chat Interaction

There are two types of chat interactions:

- **Web-based chat.** Is real-time communication between two users, each using a computer. When a chat is started, either user can enter text by typing on the keyboard. The entered text appears on the other user's monitor.
- **Intelligent chat.** Uses keyword matching to find recommended chat responses.

Normally, a customer requests a chat by completing a form created by an administrator. The form might ask customers for information, such as their name, company name, email address and phone number.

Interaction Manager uses the customer's email address to automatically send a new chat to an available agent. When you receive a new chat interaction, Interaction Manager notifies you by displaying the interaction information in a New Chat window.

Oracle Contact On Demand tries to automatically assign a contact based on the email address for chats. The name that displays in the window is the contact's name, if it is assigned, or Unknown, if it is not assigned. Interaction Manager populates the customer information entered in the Create Contact tab to help you create a new contact for this interaction.

If your company has configured your system to allow multiple simultaneous chat interactions, you can handle multiple chat interactions simultaneously, up to the limit set by your system administrator.

Note: You must click Accept within 1 minute or else Interaction Manager changes your status to No Answer, and moves the interaction to the queue for the next available agent. If you already accepted a chat interaction, you can make yourself available to accept a phone interaction by selecting Available from the Status list.

Accepting a Chat

You must click Accept within 1 minute, or your status is changed to No Answer, and the interaction is moved to the queue for the next available agent.

To accept a chat

1. From the Interaction Control Bar, click the Accept icon in the New Chat window.

A Chat page opens showing the person's name (if known), your system time, and the text message. Interaction Manager uses a Chat Template (if configured), and enables the Chat Response button.

Note: Upon acceptance of an interaction, the interaction control is automatically minimized. If you want to view the interaction detail or act upon the interaction, you can use the mouse to hover over the interaction to expand it.

2. If Interaction Manager cannot find the contact that you want, create a new one.

Interaction Manager helps you by using the information provided by the customer's chat request to begin populating the contact information page. For more information on locating contacts, see "[Finding Contact Records](#)" on page 17-1.

3. You can respond in several different ways:

- Send a text message
- Share Web pages back and forth
- Push a predefined URL
- Push a unique URL
- Select a predefined chat response based on a chat template

Sending a Chat Text Message

Complete the steps in the following procedure to send a chat message.

Chat messages that you send can contain a maximum of 1024 characters. Content in chat messages that exceeds this 1024-character limitation is deleted from the message when you send it. This 1024-character limitation also applies to chat messages that you receive.

To send a chat message

1. From the bottom of the Chat page, in the Text tab, type your text message.

2. Click Send.

Your response appears in the chat box.

Note: The contact's first name and last name appear when the contact is typing a message.

Pushing a Predefined Web Address

Using chat, you can push a predefined Web address (URL) to the customer.

To push a Web address

1. Click URL Library.

A list of predefined addresses (URLs) for various Web pages appears.
2. Review and double-click the most appropriate URL to give to the customer.
3. Click Push to forward your selection to the customer.

Pushing a Unique Web Address

Using chat, you can push a unique Web address (URL) to the customer.

To push a unique Web address

1. From the bottom of the Chat page, click the URL tab.
2. Type the unique Web address, and then click Push.

Sending a Prepared Response

You can use the Chat screen to send a prepared response (intelligent chat) supplied by your administrator to the customer.

To send a prepared response

1. In the Chat page, select specific text that the customer typed (such as a product name, product type, and so on).
2. Click the Chat Response button.

Interaction Manager tries to match the selected text to a predefined pattern stored in the library templates.

One or more matching templates might appear. (Each template displays a percentage match in the upper-right corner, based upon how closely the customer's specific words match the keywords in the template.)

Note: If there is no score, or a low score, you can scroll through the templates to determine which information is appropriate for your customer.

3. Click a template to review it, and then you can do one of the following:
 - Cut and paste information from the template into the text area of the Chat page.
 - Select the text, and click Copy to send the text to the customer.

4. Click Send to.

Interaction Manager sends the information to the client, and displays it in the message window.

Using Chat Cobrowsing

You and the customer can share Web page URLs back and forth.

To use chat cobrowsing

- Click Start Cobrowsing.

A browser window opens showing the URL that you want the customer to see. Any change you or the customer makes appears in both your window and the customer's browser window.

Receiving a Chat from Your Supervisor

When you receive a chat interaction from your supervisor, Interaction Manager notifies you by displaying the interaction information in the Interaction Control Bar. A chat page opens showing your supervisor's name, timestamp, and a text message.

To receive a chat from your supervisor

1. From the bottom of the chat page, in the Text tab, type your text message.

Your supervisor can see that you are in the process of typing and knows you have seen the message, because your first and last names appear in a typing message.

2. When you have finished typing, click Send.

Note: You cannot refuse to accept a supervisory chat. You can respond to a chat only by text messaging.

Transferring a Chat to Another Workgroup or Agent

You can transfer a customer chat to another workgroup or agent, or to a supervisor working on the project.

To transfer a chat

1. In the Active Chat window, click Transfer.

The Transfer dialog box opens.

2. Double-click the name of an agent, and then click Cancel to close the Transfer dialog box.

The following events occur:

- Interaction Manager removes the chat interaction from the Interaction Control Bar.
- If the agent accepts the transferred chat, Interaction Manager sends a transcript of your previous communication with the customer to the agent.
- If the agent is unavailable to accept the chat interaction, Interaction Manager transfers the customer back to you.

Note: You can view the transfer history of interactions that were transferred to another workgroup or agent in the Interaction History and Contact History tabs. For more information on viewing interaction history, see "[Viewing Interaction History](#)" on page 10-1.

Ending a Chat Session

When you finish chatting with a customer, end the session so that Interaction Manager can save the interaction in the contact database, and update your interaction statistics.

Interaction Manager saves the interaction to the database even if the contact is not assigned, and has Unknown as the contact's name. Thus, it is much easier to retrieve chat history when you assign contact information. For more information on how contacts are assigned, see "[Contact Assignment](#)" on page 17-6.

To end a chat session

1. Type a message for the customer, indicating that you are finished chatting, and click Send.
2. In the Interaction Control Bar, click the End Chat Session link.

Viewing Interaction History

This chapter describes contact interaction history records and shows you how to access and use this information. It includes the following topics:

- [Contact Interaction History Records](#)
- [Accessing Interaction History Information](#)
- [Viewing Current Interaction History](#)
- [Viewing Contact Interaction History](#)
- [Viewing Inactive Interactions](#)
- [Viewing Inactive Media Interactions](#)

Contact Interaction History Records

Interaction Manager tracks each step of a customer's interaction in a Contact History record. Knowing the details about all of the customer's previous interactions helps you to respond with greater accuracy. Contact History information includes:

- The contact's name, or Unknown for unassigned interactions
- The interaction start and stop times
- Which agent received the interaction
- Voice recordings
- Notes
- Transcripts of the original email or chat, and the response (if the interaction was an email or chat)

Known Contacts and Unknown Contacts

Assigning a contact to each interaction makes it easier to access the complete interaction history. Interaction Manager labels unassigned contacts as Unknown, which means that they are not defined in the contact database, or that they are not unique.

Accessing Interaction History Information

You can access interaction history information in different ways:

- Use the Current Session History tab for an active interaction. (You can use a contact name or search interactions assigned as Unknown.)

- Select Contact from the Sidebar. (You must use a contact name.)
- Select Interaction History from the Sidebar to find information about any inactive interaction. (You can use a contact name or search interactions that Interaction Manager assigned as Unknown.)

Viewing Current Interaction History

When you accept a new interaction, Interaction Manager automatically displays interaction information, if known, in your workspace in the Interaction Information tab. This tab displays general information about the customer (such as the name, address, phone numbers, email address, and priority rating). If the customer information is unknown, then the name, Unknown, appears in place of the contact's name.

To view current interaction history

1. Select the Current Session History tab to view all steps that the current interaction experienced before Interaction Manager routed it to your workstation.
2. Click an underlined item to access more information, such as a chat transcript, an email transcript, a voice recording, or a note.

For example, if you click a transcript link, Interaction Manager opens a new window displaying the contents of the transcript.

If you click a recording link, Interaction Manager loads the object into the sound editor on your host (such as Windows Media, Real Player, and so on). Your sound editor automatically opens and plays the recording.

Viewing Contact Interaction History

The Contact History tab allows you to look up and view interaction history for contacts with contact information that is saved in the Oracle Contact On Demand database. The Contact History tab lists the following for every interaction.

To view contact history

1. From the Sidebar, click Contact.

The Contact tab opens in your workspace.

2. Search for contacts by entering or selecting one or more of the criteria from the respective menus. You can search by:
 - Identity
 - Company
 - First Name
 - Last Name
 - Title
 - Address
 - Street
 - City
 - State/Province
 - Country

- Zip/Postal
 - Phone
 - Work
 - Extension
 - Fax
 - Cell
 - Home
 - Others
 - E-mail
 - Home-page
 - Department
 - Pager
3. After entering the search criteria, click Find.
A list of all matching contacts appears.
 4. Double-click the contact
 5. Click the Contact History tab.
A list of interactions for the contact is displayed. You can sort by Project, Type, or Date/Time by clicking the corresponding column heading.
 6. Double-click the interaction.
The Interaction History window appears. It presents a chronological event log of the interaction, from origination to termination. If the interaction was transferred to an external number or the result of a supervised transfer to another interaction, additional details about the outbound interaction are available for you to view.
 7. To view the external history, perform the following.
 - a. Click Show External History.
The Show/Hide External History option displays the history of interactions that are transferred to an external number. The external history is available for inbound calls that were transferred to an external number as well as supervised transfers to another interaction. For example:

```

01/21/2010 11:26:09 PM -- Interaction routed to project P1 Priority ***
01/21/2010 11:26:19 PM -- Interaction entered workgroup WG8 Priority ***
01/21/2010 11:26:19 PM -- Interaction offered to agent Adam Johns
01/21/2010 11:26:19 PM -- Interaction exit workgroup WG8 time n queue
duration 0:00:00
01/21/2010 11:26:21 PM -- Interaction answered for workgroup WG8
01/21/2010 11:26:21 PM -- Interaction accepted by agent Adam Johns
01/21/2010 11:26:21 PM -- Ring Time duration 0:00:02
01/21/2010 11:26:29 PM -- Interaction assigned to John Samsom
01/21/2010 11:27:06 PM -- Interaction removed, talk time duration 0:00:45
01/21/2010 11:27:06 PM -- Interaction transferred to external number
918885555555 [-] Hide External History
      01/21/2010 11:27:06 PM -- Interaction billed to project P1
      01/21/2010 11:27:43 PM -- Interaction transferred from
3001834994983
      01/21/2010 11:27:34 PM -- Interaction terminated, reason 16
interaction duration 0:01:34

```

```
01/21/2010 11:27:06 PM -- Interaction transferred successfully
01/21/2010 11:27:43 PM -- Interaction terminated, reason: 16 interaction
duration 0:01:34
01/21/2010 11:29:15 PM -- Note attached to an interaction
```

- b. Click Hide External History to collapse the expanded detail.
8. To attach a note to the interaction:
 - a. Click the Note icon to open the Add Note window.
 - b. Type the contents of your note, and click OK.
9. After viewing the interaction, click Close.

The Contact History tab is displayed.

Viewing Inactive Interactions

The Interaction History tab allows you to find and view inactive interactions. It lists for every inactive interaction:

- Interaction type
- Interaction ID
- Originator
- Destination
- Date/Time

To view inactive interactions

1. From the Sidebar, click Interaction History.

The Interaction History tab opens, where you can search for inactive interactions.

2. Search for an interaction by entering or selecting one or more of the criteria from the respective menus or calendars:
 - Interaction type
 - Interaction ID
 - Originator (customer phone number)
 - Email address
 - Fax number
 - Date range
 - Project
 - Workgroup
 - User

- 3.** After entering the search criteria, click Find.

A list of all matching inactive interactions appears. You can sort by Project, Type, or Date/Time by clicking the corresponding column heading.

4. Double-click the interaction.

Details of the inactive interaction appear in the History window. The History window displays an historical and chronological view of every event in the

interaction, from origination to termination. If the interaction was transferred to an external number, additional details about the outbound interaction are available for you to view.

5. To view the external history, perform the following.

a. Click Show External History.

The Show/Hide External History option displays the history for interactions that were transferred to an external number. The external history is available for:

- inbound calls that were transferred to an external number
- supervised transfers to another interaction
- project menus that routed the call interaction to an external number
- campaigns that routed to an external number

```
01/21/2010 11:26:09 PM -- Interaction routed to project P1 Priority ***
01/21/2010 11:26:19 PM -- Interaction entered workgroup WG8 Priority ***
01/21/2010 11:26:19 PM -- Interaction offered to agent Adam Johns
01/21/2010 11:26:19 PM -- Interaction exit workgroup WG8 time n queue
duration 0:00:00
01/21/2010 11:26:21 PM -- Interaction answered for workgroup WG8
01/21/2010 11:26:21 PM -- Interaction accepted by agent Adam Johns
01/21/2010 11:26:21 PM -- Ring Time duration 0:00:02
01/21/2010 11:26:29 PM -- Interaction assigned to John Samsom
01/21/2010 11:27:06 PM -- Interaction removed, talk time duration 0:00:45
01/21/2010 11:27:06 PM -- Interaction transferred to external number
918885555555 [-] Hide External History
      01/21/2010 11:27:06 PM -- Interaction billed to project P1
      01/21/2010 11:27:43 PM -- Interaction transferred from
3001834994983
      01/21/2010 11:27:34 PM -- Interaction terminated, reason 16
interaction duration 0:01:34
01/21/2010 11:27:06 PM -- Interaction transferred successfully
01/21/2010 11:27:43 PM -- Interaction terminated, reason: 16 interaction
duration 0:01:34
01/21/2010 11:29:15 PM -- Note attached to an interaction
```

Note: Additional interaction history is available for outbound interactions that are created after being transferred from an inbound call, project menu, or campaign. The interaction ID will appear as a hyperlink for you to click to access the originating interaction.

b. Click Hide External History to collapse the expanded detail.

6. To obtain a copy of the interaction, perform one of the following:

- a. Click Print, which opens your printer window.
- b. Click Copy to Clipboard, which copies the contents of the inactive interaction to your clipboard. Open a word processing program (such as Microsoft Word or WordPad), and paste the information.

7. To attach a note to the inactive interaction:

- a. Click the Note icon to open the Add Note window.
- b. Type the contents of your note, and click OK.

8. To start a new search, click New Search.
The Interaction History tab is displayed.

Viewing Inactive Media Interactions

Use the Media tab to research information about inactive media interactions.

To view inactive media interactions

1. From the Sidebar, click Interaction History.
The Interaction History tab opens.
2. Click Media.
The Media tab opens, where you can search for the interaction history of an inactive media interaction.
3. Search for a media interaction by entering or selecting one or more of these criteria from their respective menus, calendars, or options:
 - Media type
 - Media ID
 - Originator
 - Destination
 - User
 - Date range
 - Media store remotely
 - Media removed from system
4. After entering search criteria, click Find.
A list of all matching media interactions appear.
5. Double-click the media interaction.
The details appear in the window below the list.
6. To obtain a copy, do one of the following:
 - Click Print, which opens your printer window.
 - Click Copy to Clipboard, which copies the information to your clipboard. Open a word processing program (such as Microsoft Word or Notepad) and paste the information.
7. To attach a note:
 - a. Click the Note icon to open the Add Note window.
 - b. Type the contents of your note, and click OK.
8. To start a new search, click the New Search button, which returns you to the Media tab.

Managing Personal Voice Mail and Missed Calls

This chapter describes how to manage personal voice mail and missed calls. It includes the following topics:

- [Personal Voice Mail and Missed Calls](#)
- [Requirements Before Retrieving Personal Voice Mail Messages](#)
- [Retrieving Personal Voice Mail Messages](#)
- [Checking for Missed Phone Calls](#)

Personal Voice Mail and Missed Calls

If someone calls you while you are away from your desk, Interaction Manager displays the number of personal voice mail and missed calls in the right corner of the Toolbar.

Requirements Before Retrieving Personal Voice Mail Messages

Before you can retrieve your voice mail messages you might have to do the following:

- Configure your email client. For more information on retrieving voice mail messages, see ["Specifying Sounds for New Interactions"](#) on page 4-1.
- Add audio software to your computer to hear voice mail.

Note: This chapter describes what the Interaction Manager software can do. However, some of these features might not be enabled at your site. Contact your supervisor or administrator if you are not sure which features your site uses.

Retrieving Personal Voice Mail Messages

Complete the steps in the following procedure to retrieve your voice mail messages.

To retrieve personal voice mail messages

1. From the Toolbar, click the missed personal Voice-mail link.

The Voice-mail Inbox opens, showing a list of missed personal voice mail messages, including the name of the person who sent the voice mail and the date and time it arrived. Depending upon your system configuration, some of the following events can occur:

- If the word *Voice Mail* appears in red, it indicates that you have not yet listened to your personal voice mail.
 - If the word *Voice Mail* changes to black, it indicates that you have listened to the voice mail, but have not deleted it from your Inbox yet.
 - A number next to the Voice-mail link indicates how many personal voice mail messages you have.
2. Double-click a voice mail from the list.

Interaction Manager loads the voice mail into the media player on your workstation, and begins playing the voice mail.

Note: It might take a few minutes for your media player to open.

Checking for Missed Phone Calls

You can check for missed phone calls, and then return those calls.

To check for missed phone calls

1. From the Toolbar, click the red Missed Calls link.

The Missed Calls window opens, showing a list of messages along with the times that they arrived.

Note: The missed calls message always appears in red. When you clear your missed calls, the message fades from the top bar.

2. To return the call, double-click the call that you want from the list in the Missed Calls box.

Interaction Manager dials the number.

3. To clear calls, do one of the following:
 - To clear a single call, select the call from the list, and click Clear.
 - To clear more than one call, press and hold your SHIFT key as you click the calls to clear, and then click Clear.
 - To clear all calls, click Clear All.

Tip: Click a column heading to sort the list.

Managing Callback Requests

This chapter describes how to manage callback requests. It includes the following topics:

- [About Callback Types](#)
- [Accepting ACD Callbacks](#)
- [Accepting Web Callbacks](#)

About Callback Types

There are two types of callback requests that you might encounter:

- **ACD Callback from a workgroup call.** An ACD Callback occurs when a caller chooses to leave a message rather than continue to wait in a queue for the next available agent. When this happens, a New Callback Interaction window appears in the Interaction Control Bar.
- **Web Callback.** A Web Callback occurs when a customer requests to speak to an agent while visiting a Web site. When this happens, a New Web Callback Interaction window appears in the Interaction Control Bar. The customer enters more information that is not available over the phone.

Accepting ACD Callbacks

When you accept a callback, Interaction Manager notifies you and initiates the callback to the customer. An *outbound call message* is a prerecorded message customized for your contact center.

To accept a callback

1. When an ACD callback interaction appears in the Interaction Control Bar, click Accept.

The following events occur:

- If you are working on-hook, your phone will ring. When you answer your phone, you hear the outbound call message in progress. When the caller answers, begin speaking.
 - If you are working off-hook, as soon as you click Accept, Interaction Manager initiates the callback to the customer.
2. If the contact is unknown, create a new contact, or find a matching contact from a list of possibilities.

For more information on managing contacts, see "[About Contacts](#)" on page 17-1.

3. Proceed with handling the call as you would with any standard phone interaction.
For more information on phone interactions, see ["Accepting Calls"](#) on page 7-1.

Accepting Web Callbacks

Complete the steps in the following procedure to accept callbacks from the Web.

To accept Web callbacks

1. When a Web callback interaction appears in the Interaction Control Bar, click Accept.
2. Do one of the following:
 - If you are working on-hook when the caller answers, begin speaking.
 - If you are working off-hook, as soon as you click Accept, Interaction Manager initiates the callback to the customer.

The Contacts information page opens, providing information about the contact, if known.

3. If the contact is unknown, create a new contact, or find a matching contact from a list of possibilities.

For more information on managing contacts, see ["About Contacts"](#) on page 17-1.

4. Proceed with handling the call as you would with any standard phone interaction.
For more information on phone interactions, see ["Accepting Calls"](#) on page 7-1.

Managing Email Interactions

This chapter explains how to handle email interactions. It includes the following topics:

- [Accepting an Email Interaction](#)
- [Responding to an Email](#)
- [Returning a Unique Email Response](#)
- [Transferring an Email Interaction to Another Agent or Workgroup](#)
- [Sending a Prepared Email Response](#)
- [Disconnecting an Email Interaction](#)

Accepting an Email Interaction

Depending upon your system configuration, you might be able to handle multiple email interactions. Interaction Manager sends email interactions automatically to an available agent, based on the contact's email address. When you receive an email interaction:

- Interaction Manager notifies you by displaying the email interaction in the Interaction Control Bar, or by playing a sound. For more information about sound notifications, see "[Specifying Sounds for New Interactions](#)" on page 4-1.
- Interaction Manager also displays the sender's name (if known) and email address in the Interaction Control Bar. If Interaction Manager cannot find the sender's name, Unknown appears.
- The Contact tab opens in your workspace showing all the known information about the contact if a contact record associated with the email header information exists in the database.

Caution: If you do not accept a new email interaction within five minutes, Interaction Manager sets your status to No Answer, and places the interaction in the queue for the next available agent.

To accept an email interaction

- Click Accept from the Interaction Control.

The Email Interaction window updates, changes color, and provides new action links for Hold, Disconnect, Transfer, and Email Response.

Note: Upon acceptance of an interaction, the interaction control is automatically minimized. If you want to view the interaction detail or act upon the interaction, you can use the mouse to hover over the interaction to expand it.

Interaction Manager also starts your email client and displays the email message in your email program.

You can do the following:

- Send a prepared email response from an Intelligent Email Template.
- Return a unique email response.
- Transfer the email interaction to another agent or workgroup.

Responding to an Email

It is important to respond to email messages routed to you by Interaction Manager. If you accept an email interaction, but do not reply to the interaction within the time allotted by your administrator, Interaction Manager places the interaction in the queue for the next available agent.

Note: If you attempt to reply to the accepted email after the time limit has elapsed, or after another agent replies to the same email, Interaction Manager will not deliver your reply to the customer.

To respond to an email

1. Click Accept.

Interaction Manager starts your email client program.

2. If a contact record was not assigned to this customer, create and assign the contact record.

For more information on assigning contacts, see "[About Assigning Contacts](#)" on page 17-6.

Note: To save the interaction history for this email, it is best to assign a contact record before you send your response. If a contact record exists for the email customer, it is easier to retrieve the interaction history for the customer, because Interaction Manager saves the record using Unknown (contact) instead of the customer's name.

Returning a Unique Email Response

You can send a unique email response. However, it is often more productive and saves time to send a prepared response instead. For more information about email responses, see "[Sending a Prepared Email Response](#)" on page 13-3.

To return a unique email response

1. Open the email message from your client.
2. Type a response, and then click Send.

Transferring an Email Interaction to Another Agent or Workgroup

If you determine that another agent or workgroup is better suited to handle a specific email inquiry, you can transfer it to another agent or workgroup, just as you would a phone call.

Note: After you transfer an email interaction, Interaction Manager prevents you from replying to it.

To transfer an email interaction

1. From the Interaction Control Bar, click the Transfer icon in the New Email window.
The Transfer To window opens, providing a User tab and a Workgroup tab.
2. Select a tab to transfer the call to another user or workgroup.
A list of items is displayed.
3. Find and select an item from the list.
For more information on locating users, see ["Finding Users"](#) on page 5-4.
4. Click the Transfer icon.
Oracle Contact On Demand transfers the email, and the interaction disappears from the Interaction Control Bar.

Sending a Prepared Email Response

You can send a prepared email response to a customer.

To send a prepared email response

1. From the Email Interaction window in the Interaction Control Bar, click the Email Response link.
The Email Response window opens, providing a box where you can enter keywords, which Interaction Manager uses to find a corresponding match.
2. From the customer's email, copy and paste a question, a keyword, or a key phrase into the Paste conversation here box.
3. Click the magnifying glass to begin searching for a match to a response.
Interaction Manager tries to match the highlighted text to the predefined patterns stored in the library templates created by your administrator. Each matching Intelligent Email Template appears with a confidence score. A higher score indicates that the customer's email contained a greater number of intelligent email template keywords.

Note: If there is no score, or a low score, you can scroll through the templates to determine which information is appropriate for your customer.

4. Click a template to open it in your email client, where you can do one of the following:
 - Copy the displayed content of the Intelligent Email Template. Switch to your email application, and paste the copied content into the body of your message.

- Click Copy to paste the entire email response text into the return email.
5. Click Send from your email client.

Interaction Manager disconnects the interaction after a return email registers with the email distributor.

Note: When drafting your response, remember that customers are writing to a project email address, such as techsupport@example.com, and not to you personally. Your return address, which Oracle Contact On Demand sends to the customer, is also the project email address, not your personal email address.

Disconnecting an Email Interaction

If you decide that an email interaction does not require a response (because it is spam or a duplicate, for example), you can discard the email. When you discard an email interaction, Interaction Manager removes it without sending a response to the customer. However, Interaction Manager stores the content of the customer's email for later review by your administrator.

To disconnect an email interaction

1. Make sure the email interaction that you want to discard is an active interaction.
2. From the Interaction Control Bar, click Disconnect in the Email Interaction window.

If your administrator does not require you to supply an outcome for each interaction, then Interaction Manager displays a Discard Email confirmation message.

- Click Yes to discard the email.

Note: If you select No, Interaction Manager removes the email from Interaction Manager. If there is no reply to the email within the time limit set in the email project, Interaction Manager places the interaction back in the queue for reassignment.

If your administrator requires you to supply an outcome for each interaction, then Interaction Manager displays the Outcome dialog box.

- Click an Outcome from the list, and click Select.

Managing Preview Interactions

This chapter describes how to manage interactions from the preview calling project. It includes the following topics:

- [Making Preview Calls](#)
- [Outcomes for Preview Interactions](#)
- [Using the Do Not Call List](#)
- [Reading and Loading Scripts](#)

Making Preview Calls

Agents working a preview dialing project, select the next call in the list and then instruct Oracle Contact On Demand to dial the customer number. For these calls, the agent manually dispositions the result as Answer, No Answer, and so on.

To make preview calls

1. From the Sidebar, click Outbound Preview.

The Preview tab opens in your workspace.

2. From the Preview Project list, select a project.
3. Click Next to view the first record.

Interaction Manager presents the phone numbers as links.

Note: If you prefer not to call this person, click Next again to view the next record.

4. Click the Phone number that you want to try first.

Interaction Manager dials the number.

You can also select the Script, FAQ, and Opening Script tabs to view information about the Preview Project. For more information on scripts, see "[Reading and Loading Scripts](#)" on page 14-3.

One of the following options applies:

- If you are working on-hook, answer your phone, and speak to the contact.
- If you are working off-hook, you hear a beep as Interaction Manager connects you to the contact.

When Interaction Manager calls a list entry, you cannot use the same entry again.

5. Proceed with handling the call as you would with any standard phone interaction.
For more information on phone interactions, see ["Managing Phone Interactions"](#) on page 7-1.
6. If you do not make a connection, select another number, and try again.
7. When you are finished, select an outcome, and wrap up the call.

Outcomes for Preview Interactions

The Outcomes feature is optional and might not be available at your company. The following topics describe the possible outcomes, and actions for each outcome.

Outcomes and Actions

[Table 14-1](#) lists the possible outcome results for preview interactions.

Table 14-1 Outcome Results for Preview Interactions

Result	Description
Answered	The customer answered the phone. Choosing this result removes the number from the preview calling list and Oracle Contact On Demand does not call the number again.
Answering Machine	An answering machine picked up the call.
Busy	The customer's phone line is busy.
Fax	The number went to a fax machine. Choosing this result removes the number from the calling list and Oracle Contact On Demand does not call the number again.
Invalid Entry	The number is not a valid phone number. Choosing this result removes the number from the calling list and Oracle Contact On Demand does not call the number again.
No Answer	The customer's phone rang, but no one picked it up and neither did an answering machine. Choosing this result keeps the number on the calling list.

[Table 14-2](#) lists the possible actions that you can select for each outcome.

Table 14-2 Outcome Action for Preview Interactions

Action	Description
Add to Do Not Call List	Choosing this result removes the number from the calling list and Oracle Contact On Demand does not call the number again. For more information on outcomes, see "Using the Do Not Call List" on page 14-2.
Callback	Choosing this result allows the scheduling of a callback at a specific day and time. Note: Interaction Manager calls every number in the current dialer list before calling the callback number.
None	No further action is required.

Using the Do Not Call List

If a person on the preview calling lists asks to be put on the Do Not Call list, complete the following task.

To add a contact to the Do Not Call list

- From the Actions link, select Put in Do Not Call list.

Reading and Loading Scripts

Your company's administrator can create company-approved responses to common questions that a contact might have. Your company might also provide different scripts for various projects.

To read and load scripts

1. From the Side Bar, click Outbound Preview.

The Preview tab opens, showing three more tabs: FAQ, Script, and Opening Script.

- **FAQ.** Frequently Asked Questions shows a list of common questions and approved responses, which you can provide to contacts.
 - **Script.** Written words and logic to follow when handling a contact. A script assists you in maintaining focus on the content of the interaction.
 - **Opening Script.** A well-written paragraph that is design to hold a contact's attention and interest in continuing with the interaction.
2. From the Preview Project list, select the project that you want.

Interaction Manager loads the FAQs, script, and opening script for the project that you selected.
 3. Click the Opening Script tab, and read the information that appears in your workspace.
 4. Click the Script tab to view one or more links related to the project, then select the check mark to open a link to a page or Web site created for the project.
 5. To help you answer the contact's questions, click the FAQ tab to open common questions and approved responses.
 6. Use the FAQ and Script action icons to move back, forward, refresh the page, stop loading a link, and to print the page.
 7. When you finish your current interaction, click Next.

Managing Fax Interactions

This chapter explains how to handle fax interactions. It includes the following topics:

- [Accepting a Fax Interaction](#)
- [Responding to a Fax](#)
- [Disconnecting a Fax Interaction](#)

Accepting a Fax Interaction

Depending upon your system configuration, you might be able to handle multiple fax interactions. Interaction Manager sends fax interactions automatically to an available agent, based on the contact's phone number. When you receive a fax interaction:

- Interaction Manager notifies you by displaying the fax interaction in the Interaction Control Bar, or by playing a sound. For more information about sound notifications, see "[Specifying Sounds for New Interactions](#)" on page 4-1.
- Interaction Manager also displays the sender's name (if known) and interaction ID in the Interaction Control Bar. If Interaction Manager cannot find the sender's name, Unknown appears.
- The Contact tab opens in your workspace, showing all the known information about the contact if a contact record exists in the database associated with the fax information.

To accept a fax interaction

- Click Accept from the Interaction Control.

The Fax Interaction window updates, changes color, and provides new action links for Hold, Disconnect, and Transfer. Interaction Manager also starts your email client and displays the fax message as a .tiff attachment in your email program.

Note: Upon acceptance of an interaction, the interaction control is automatically minimized. If you want to view the interaction detail or act upon the interaction, you can use the mouse to hover over the interaction to expand it.

Responding to a Fax

When you respond to a fax message, it is delivered as a .tiff attachment to your mailbox.

To respond to a fax

1. Click Accept.

Interaction Manager starts your email client program.

2. If a contact record was not assigned to this customer, create and assign the contact record.

For more information on contacts, see ["Creating a Contact Record"](#) on page 17-4.

Note: To save the interaction history for this fax, it is best to assign a contact record before you send your response. If a contact record exists for the email customer, it is easier to retrieve the interaction history for the customer, because the record is saved as Unknown (contact) instead of the customer's name.

3. From the newly added contact record, click the underlined fax number.

Interaction Manager opens the Fax dialog box.

4. From the Projects list, select an appropriate project.

A list of fax templates associated with the project appears.

5. Find and select a fax template from the list.

6. Enter the fax number, and then click Select.

7. Select the billing project, and then click OK to finish the outgoing fax.

Disconnecting a Fax Interaction

If you decide that a fax interaction does not require a response, you can disconnect the fax. When you disconnect a fax interaction, Interaction Manager removes it without sending a response to the customer. However, Interaction Manager stores the content of the customer's fax for later review by your administrator.

To disconnect a fax interaction

1. Make sure the fax interaction that you want to discard is an active interaction.
2. From the Interaction Control Bar, click Disconnect in the Fax Interaction window.

One of the following events occurs:

- If your administrator does not require you to supply an outcome for each interaction, Interaction Manager discards the interaction.
 - If your administrator requires you to supply an outcome for each interaction, then Interaction Manager displays the Outcome dialog box.
3. If an outcome is required, choose an Outcome from the list, and click Select.

Managing Multiple Interactions

This chapter describes how to manage multiple interactions. It includes the following topics:

- [Setting Your Status](#)
- [Accepting Multiple Interactions](#)

Setting Your Status

Most of the time, you will probably handle only one phone interaction at a time. However, if you want to, you can accept multiple interactions, such as a phone call, or email, but you must reset your status to Available before Interaction Manager offers you a new interaction.

To set your status

1. When Interaction Manager offers you an email, accept it.

Notice that when a new phone interaction arrives, it appears in the IM Banner, but Interaction Manager will not present it to you as long as your status is Busy. Your status must be Available before Interaction Manager will present the new interaction to you. For more information on accepting an email, see ["Accepting an Email Interaction"](#) on page 13-1.

2. To make yourself available to accept a phone interaction, select Available from the status list.

When your status is Available, Interaction Manager presents the new interaction in the Interaction Control Bar.

Accepting Multiple Interactions

You can accept multiple interactions such as a phone call, or email, if your status is set to Available.

To accept multiple interactions

1. When Interaction Manager offers you an interaction, accept it by clicking the Accept link, and then place the interaction on hold.

Note: Upon acceptance of an interaction, the interaction control is automatically minimized. If you want to view the interaction detail or act upon the interaction, you can use the mouse to hover over the interaction to expand it.

2. To make yourself available to accept a new interaction, select Available from the Status list.

When your status is Available, Interaction Manager presents the new interaction in the Interaction Control Bar. Each time you accept an interaction, and change your status to available, Interaction Manager continues to present new interactions. After accepting two interactions, Interaction Manager displays a scroll bar showing the total number of interactions that you are currently handling.

3. Click the down arrow to open a window for the interaction that you select.

Note: You can have two active phone interactions only if they are in conference. You can place the first phone interaction on hold, and then accept a new interaction.

Managing Contacts

This chapter describes how to manage contacts. It includes the following topics:

- [About Contacts](#)
- [Finding Contact Records](#)
- [Finding Contact Records](#)
- [Communicating with a Contact](#)
- [Creating a Contact Record](#)
- [Editing a Contact Record](#)
- [Deleting a Contact Record](#)
- [Viewing a Contact](#)
- [About Assigning Contacts](#)
- [Listening to a Recorded Interaction](#)
- [Adding Notes](#)

About Contacts

A contact can be anyone who has ever reached your contact center. Usually, contacts are your customers, but they can also be prospects, vendors, and partners.

Use the Contact tab from the Sidebar to create contact records, update contact records, or view history information for a specific contact. Contact records contain information about the contact, such as the contact's name, address, phone number, email address, and notes.

When you accept an interaction from a contact, you can assign (or link) the contact to a contact record so that all of the information that was previously recorded about that customer displays in your workspace. This background information provides some familiarity with the contact and the contact's previous activity or issues. The saved information includes all the times that the customer reached the contact center, how Interaction Manager routed the customer through Oracle Contact On Demand, and to whom the customer spoke, or sent an email and whether the call was transferred to an external number.

Finding Contact Records

Complete the steps in the following procedure to find contact records.

To find contact records

1. From the Sidebar, click Contact.

Interaction Manager opens the last Contact screen that you accessed. If your screen opens with a completed screen, click the Find icon. The Contact screen can be customized by an administrator.

2. After opening the Contact Find screen, type any relevant information related to the contact into one or more fields.

The more information you enter, the smaller the list of matching results that is generated.

Tip: You can also type an asterisk (*) in a field to return ALL contacts for that field. If there are too many matches, a message appears requesting more search criteria to reduce the possible matches. To avoid overload traffic, the asterisk (*) must be used with a keyword. Using the asterisk (*) wildcard alone will not work.

Note: Searches are not case sensitive, so *Smith* is the same as *SMITH* and as *smith*.

3. Click Find.

A list of all contacts in the Oracle Contact On Demand database that match the fields you completed appears in your workspace.

4. Do one of the following to sort the contacts:

- Click a column heading.
- Click the same column heading again to reverse the sort order (from ascending to descending and from descending to ascending).
- Press and hold the CTRL key while you click another column to multi-sort contacts.

For example, to sort first by last name, click the Last Name column heading. To sort by state while still keeping the last names in order, press and hold the CTRL key while clicking the State/Province column.

5. Double-click the contact from the list.

The Contact page opens to show all known information about the contact.

Clearing Contact Records

When you query for contact records and the resulting data displays, you must clear the contact data to perform a new search. Complete the steps in the following procedure to clear contact records.

To clear contact records

1. From the Sidebar, click Contact.
2. Perform a search in the Contact Find screen.

A list of all contacts in the Oracle Contact On Demand database that match the fields you completed appears in your workspace.

3. After viewing the search results, Click Clear to manually clear the results of the query.

Note: The data values in all fields will be cleared, with the exception of the Country field. The Country field will default to the country that is defined for the company.

Communicating with a Contact

The contact record provides the contact's telephone number, fax number, email address, and other contact information. When you find the contact record, you can communicate with the contact by clicking one of the underlined information fields.

To communicate with a contact

1. Find the contact.

For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

2. From the contact results list, double-click the contact.

The Contact page displays all known information about the contact.

3. Click any underlined telephone number, fax number, or email address.

Interaction Manager makes the call, opens the Fax dialog box, or opens your email client:

- For more information on phone interactions, see ["Managing Phone Interactions"](#) on page 7-1.
- For more information on email interactions, see ["Managing Email Interactions"](#) on page 13-1.
- For more information on fax interactions, see ["Managing Fax Interactions"](#) on page 15-1.

[Table 17-1](#) shows the different hyperlinks and describes what occurs when you click them.

Note: If your administrator has customized your Contact Record screen, you might not see all of the fields described in [Table 17-1](#).

Table 17-1 *Contact Record Hyperlinks*

Hyperlink	Action
Work	Interaction Manager dials the contact's work phone number.
Fax	Selects a fax number, a project for billing the interaction, and then Interaction Manager dials the contact's fax number.
Cell	Interaction Manager dials the contact's cellular (mobile) phone number.
Home	Interaction Manager dials the contact's home phone number.
Email	<p>If you have provided information about the email program that you use, Interaction Manager opens a new email message, and places the customer's email address in the To: field.</p> <p>The return address on the email is the address that you configured as your return address in your email client program (not your personal email address).</p>
Home Page	Interaction Manager starts a Web browser and opens the Web page identified in the hyperlink.

Creating a Contact Record

Interaction Manager stores interaction information about all contacts. It is important, however, to add as much contact information about a contact, so that you can find the record later. You can create a new contact record at any time, even when you make or receive a call, but you must have user privileges. If you are currently managing an active interaction, the contact information automatically appears in your workspace, if known. You can update this information, or create a new contact.

To create a contact record

1. Click Contact from the Sidebar to open the Add Contact screen in your workspace.
2. Type the information that you gather from the customer in the appropriate fields.

Note: Your administrator can specify that some of the fields are required.

3. Click OK to save your changes, or click Cancel to close without saving any changes.

Adding Contacts and Modifying Details

Whenever you make or receive a call, chat, or email, the Contact Interaction Information tab appears in your workspace. You use this tab to verify, and add details about a contact.

To add contacts and modify details

1. If the contact is in the database and there are no duplicate records, verify the contact's information and make changes, if necessary, when the contact record appears.

For more information on modifying contacts, see ["Editing a Contact Record"](#) on page 17-5.

Note: If a duplicate record exists, Interaction Manager presents a list of possible records, so that you can select the correct one, if it is on the list.

- a. If there is no data in the contact record, verify whether this contact already exists by typing the caller's name or company into the First Name, Last Name, and Company fields, and then clicking Find.
You can use an asterisk (*) as a wildcard character.
 - b. If the contact is not in the database, then click Add.
A blank Add Contact page appears.
 - c. Type all relevant information in the fields.
2. Click OK.

The Interaction Information tab refreshes to show the information that you entered.

If the interaction disconnects before you saved the information, an Unsaved Contact Info message appears, allowing you to complete entering the information, and save it before the workstation closes.

3. Click Yes to save the record.
4. If you are still on the call, you can assign the interaction to this contact.

For more information about assigning a contact, see ["Manually Assigning a Contact to the Current Interaction"](#) on page 17-7.

About Custom Tab

The Custom tab is an optional feature of Oracle Contact On Demand. Using this tab, your administrator can integrate Interaction Manager with other applications that are specific to your business, such as CRM or Help Desk. In addition, your administrator can give this tab a unique label to identify its function.

Depending upon how your administrator designs this tab's function a Web page or a script might open each time that you receive an interaction, when you accept an interaction, when an interaction becomes active, or each time that you complete an interaction.

Tip: If you see a unique tab in your Contact Interaction Information area, contact your supervisor or administrator for information.

Editing a Contact Record

If you have privileges, you can edit the contact information.

Note: Your administrator might not allow you to edit contacts. If you do not see the Edit button, contact your administrator.

To edit a contact record

1. From the Sidebar, click Contact.

The Contact tab opens in your workspace or from the workstation of the current interaction.

2. Find the contact record that you want to edit.

For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

3. From the search results list, double-click the contact that you want to edit, and click Edit.

The Edit Contact screen opens.

4. Modify the data in any of the fields.
5. Click OK to save your changes, or click Cancel to discard any changes.

Deleting a Contact Record

You can delete contact records only if you have privileges to do so.

To delete a contact record

1. From the Sidebar, click Contact.

The Contact tab opens in your workspace.

2. Find the contact record that you want to delete.

For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

3. From the search results list, double-click the contact that you want to delete.

The contact information appears.

4. Click Delete.

A confirmation message appears.

5. Click OK.

Viewing a Contact

You can view the details of one or more contacts. For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.

To view contact details

1. Find one or more contacts.
2. Double-click the contact from the search results list.
3. Click View to see the contact's information.

About Assigning Contacts

Assigning a contact means that when the customer reaches the contact center, the customer's email address or phone number is linked to the same phone number or email address in the list of contacts.

When Interaction Manager links the email or phone number of the current customer (the current interaction) to an email or phone number in a contact record, then the record is assigned to the current interaction.

Assigning a contact record to the current interaction results in the following:

- The customer's name appear in the Interaction Control Bar. If a Contact is not assigned to the current interaction, Unknown appears instead of the name.
- Interaction Manager automatically appends a new interaction record to the customer's contact history.

If the current interaction is never assigned to a contact record, you will never build up a history for that customer. You will never know what happened with that customer on previous calls, emails, and so forth. You cannot retrieve the history from the contact. But you can find history using the Interaction History.

Contact Assignment

Contact records can be assigned (linked) to the current interaction in two ways:

- **Auto-assignment.** If you already have a contact record for a customer and the customer reaches the contact center, Interaction Manager tries to take the customer's phone number or email address from the interaction and match it to a phone number or email address in the contact list. If a unique match is made, Interaction Manager automatically assigns the contact record to the current

interaction. If multiple records exist, a list of possible matches appears. Select the record that matches, if applicable.

Auto-assignment depends on the interaction types as well. The customer's email address is used to auto-assign chat, and email interactions, regardless of the other information provided. The customer's phone number is used to auto-assign phone, callback, Web callback, and fax interactions.

For example, the chat request requires an email address, and the customer provides an identical phone number but a different email address from the one stored in the contact record. The interaction comes to the agent marked as Unknown customer, but not marked from a known customer. In this case, if the customer provides the same email address as in the contact record, auto-assignment is completed successfully.

- **Manual assignment.** If a customer reaches the contact center and there is no contact record for the customer, you can create a contact record while you work with the customer, and manually assign the new contact record to the current interaction.

Manually Assigning a Contact to the Current Interaction

Callers might not dial in from the same telephone number as they did previously. In this case, Interaction Manager cannot automatically retrieve the callers' past information. You must, therefore, find the contact's information manually, and then assign the contact to the interaction so that the information is recorded.

To manually assign a contact to an interaction

1. Accept the interaction.
2. Find the contact record. If none exists, create a new contact record.

For more information on locating and managing contacts, see ["Finding Contact Records"](#) on page 17-1 and ["Creating a Contact Record"](#) on page 17-4.

Note: The phone number and email of the contact that you create must match the phone number and email for the current interaction.

For example, if the email for the customer in the current interaction is *sda@entprise.com* and the phone number is 5551212, enter *sda@entprise.com* in the Email field of the contact, and 5551212 in one of the phone fields (such as Work, Cell, or Home).

3. After you create or find the contact record, click View to open the contact record details.

For more information on viewing contact records, see ["Viewing a Contact"](#) on page 17-6.

4. Click the Assign icon.

After Interaction Manager successfully assigns the contact to the current interaction, the customer's first name and last name appear in the Active Call window.

Viewing Contact History for a Current Interaction

Each time a customer reaches a contact center, some information about the customer's progress through the contact center is recorded, such as:

- The project and workgroup to which the customer was routed.
- The agent who was offered and accepted the interaction.
- Whether the customer was transferred and to whom and if the transfer was to an external number.

If you are currently handling an interaction, you can view the details of what has happened to the customer from when the customer first reached the contact center until you accepted the interaction.

To view contact history for a current interaction

- From the Sidebar, click Interaction History.

The Interaction History tab opens in your workspace.

One of the following occurs:

- If the current interaction was assigned to a contact when the interaction ends, Interaction Manager permanently saves the interaction history and appends it to the contact. This process creates a valuable history that is specific to the customer and can be retrieved later. For more information on contact assignment, see ["About Assigning Contacts"](#) on page 17-6.
- If the current interaction was not assigned to a contact, the information is still recorded in the history. You can retrieve this information by project or workgroup, or by interaction ID.

The interaction history is appended to the contact as an interaction record, which means, at any time, you can view all of a contact's interaction records (the contact's complete history with your contact center), including whether the call was transferred to an external number or a supervised transfer to another interaction. For more information on viewing Interaction History, see ["Viewing Current Interaction History"](#) on page 10-2 and ["Viewing Contact Interaction History"](#) on page 10-2.

Scenario for Creating a Contact History for the Current Interaction

A new customer reaches your contact center (by email, phone, or other means), and you accept the interaction. The customer has never contacted your contact center before, so you create a new contact record for the customer. For more information on establishing new contacts, see ["Creating a Contact Record"](#) on page 17-4.

You can also manually assign the contact to the current interaction. For more information on manually assigning contacts, see ["Manually Assigning a Contact to the Current Interaction"](#) on page 17-7.

While you are working with the customer, Interaction Manager continues to record how long the interaction is taking and other information. When you end the interaction, Oracle Contact On Demand saves the interaction history, and appends it to the contact. The contact has one interaction record.

A few days later, the same customer reaches the contact center. This time, because Interaction Manager already has a contact record for the customer (email address and phone number), Oracle Contact On Demand auto-assigns the contact record to the customer. When you end the interaction, Oracle Contact On Demand saves the interaction history as a new interaction record and attaches it to the contact. Two interaction records are associated with the customer.

Viewing a Contact's History (Interaction Records)

You can view a history of all interactions with a customer.

To view a history of interactions

1. Find the contact.
For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.
2. Click the Contact History tab.
The History tab displays all of the contact's interaction records.
3. Double-click any interaction record to view it.

Listening to a Recorded Interaction

You can use Interaction Manager to record your phone interactions, and listen to the recording later. For more information on recorded calls, see ["Recording Calls"](#) on page 7-8.

To listen to a recorded interaction

1. Find the contact.
For more information on locating contacts, see ["Finding Contact Records"](#) on page 17-1.
2. Click the Contact History tab, and double-click a specific interaction to open the details of that interaction.
3. Double-click a hyperlink.

Interaction Manager opens your media player and begins to play.

Note: It might take some time for your media player to load.

Adding Notes

Although Interaction Manager automatically records interaction history (time in queue, transfers, agent's name, and so on) there are times when you want to add further information about the customer (such as problems that the customer has had, previous questions, or technical notes). There are two note types:

- **Contact note.** You can attach a more general note to a contact (such as noting the type of equipment the customer uses). Contact notes appear in the Contact History tab.
- **Interaction note.** You can record information that was specific to one interaction, such as a complaint that a customer had on a specific day. Interaction notes appear as hyperlinks inside an interaction record.

Adding a Note to the Current Interaction

Complete the steps in the following procedure to add a note to the interaction that you are currently handling.

To add a note

1. From your workspace, click the Note icon in the Current Session History.

- The Add Note window opens.
2. Type your Note text, and then click OK.

Viewing a Note Attached to the Current Interaction History

You can view any note associated with an interaction. However, you cannot edit a note. To change the information, you must create a new note.

To view a note attached to the interaction history

1. From the Workspace, click the Current Session History tab.
A hyperlink to your note appears as an entry in the interaction history.
2. Click the Note hyperlink.
A window appears showing the contents of the note.

Adding a Note to an Existing Interaction Record

Although you cannot edit a note, you can add information to a new note.

To add a note to an interaction record

1. Find the contact, and view the Contact History.
For more information on contacts, see ["Finding Contact Records"](#) on page 17-1 and ["Viewing a Contact's History \(Interaction Records\)"](#) on page 17-9.
2. Double-click an interaction record to open it.
3. Click the Note icon to open the Add Note window.
4. Type your note text, and then click OK.

Viewing a Note Attached to an Interaction

You can view notes associated with an interaction. You cannot edit the notes, but you can add a new note.

To view a note for an interaction

1. Find the contact, and then view the Contact History.
For more information on contacts, see ["Finding Contact Records"](#) on page 17-1 and ["Viewing a Contact's History \(Interaction Records\)"](#) on page 17-9.
2. Double-click an interaction record to open it.
A hyperlink to a note appears as an entry in the interaction record.
3. Click the Note hyperlink.
A window opens showing the author, the date, and the contents of the note.

Adding a Note to a Contact

You can add a note to a contact record to provide more details about the customer.

To add a note to a contact record

1. Find the contact, and then click Contact History.
For more information on contact history, see ["Finding Contact Records"](#) on page 17-1.

2. Click the Note icon.
3. Type your note text, and click OK.

Viewing a Note Attached to a Contact

You can view, but not edit, a note associated with a contact. If you want to change information, add a new note.

To view a note attached to a contact

1. Find the contact and view the contact history.

Any notes that were attached to the contact appear in the History tab. For more information on contact history, see "[Viewing a Contact's History \(Interaction Records\)](#)" on page 17-9.

2. Double-click the note to view it.

Making Calls

This chapter explains how to make different types of call interactions, including internal, outside, PBX (Private Branch Exchange), IP or VoIP, and company directory calls. It includes the following topics:

- [Types of Calls](#)
- [Redialing a Number](#)
- [Redialing a Number](#)

Types of Calls

If you have privileges, you can make calls outside your company. If you use the Dialer, you can make these call types:

- **Outbound call.** Calls that you make to phone numbers outside your company.
- **Extension call.** Calls that you make to extensions within your company.
- **IP call.** Calls that you make to software phones running on someone's computer.
- **PBX call.** Calls that you make to a PBX.
- **Speed dial.** Select a predefined number (or numbers) assigned to a longer, stored, often used, number for quicker calling.

Note: You might have one or several of these call types. Only those options configured for the company will appear in the dialer list.

Making an Outbound Call

Complete the steps in the following procedure to make an outbound call.

To make an outbound call

1. From the Toolbar, click the Dialer link.
The Create New Interaction dialog box opens with the Dialer tab.
2. From the list, select Outbound Call.
When you start the Dialer for the first time, the default option is Outbound Call. Afterwards, the default is the last number that you dialed.
3. From the country list, select a country code, then do one of the following:
 - Type the phone number in the box.

- Click each digit of the phone number on the Dialer's keypad.
- Use the Speed Dial tab.

For more information on using unique key combinations to initiate a call, see ["Using Speed Dial"](#) on page 18-5.

Note: Interaction Manager recalls the numbers that you dial during your current session. Click the down arrow to access the previous numbers.

4. Click Dial.

Interaction Manager dials the number.

5. Select the Close After Dialing check box so that the Dialer window will automatically close after you click Dial.
6. (Optional) Before dialing the number, Interaction Manager might open the Billing Project window, depending upon your project requirements. If it does, then:
 - a. Select a Billing Project from the Name list.
 - b. Click OK.

Notice that when the call connects, Interaction Manager changes your status to Busy.

Interaction information appears, such as the contact's name (if known) and phone number, in the New Outbound Call window. The Interaction Information tab opens in your workspace, showing more information about the contact, if available.

When the contact accepts the interaction, the following occurs:

- The New Outbound Call window changes to the Active Outbound Call window, and provides links to actions that you can perform.
- A phone handset and the word *Talking* appear.

Making an Internal (Extension) Call

There are two ways to call another person in your company:

- If you know the person's extension, you can use the Dialer.
- If you do not know the person's extension, you can use the company directory. For more information on locating a user, see ["Finding Users"](#) on page 5-4.

The following steps describe how to make a call when you know the person's extension.

To make an internal call

1. From the Toolbar, click Dialer.

The Create New Interaction window opens with the Dialer tab.

2. From the list, select Extension Call.
3. Do one of the following:
 - Type the extension number in the box.
 - Click each digit of the extension number on the Dialer's keypad.

- Use the Speed Dial tab.
For more information on using unique key combinations to initiate a call, see ["Using Speed Dial"](#) on page 18-5.
- 4. Click Dial.
Interaction Manager dials the number. Interaction Manager recalls the numbers you dial during your current session.
- 5. Click the down arrow to access the previous numbers.
- 6. Select the Close After Dialing check box, so that the Dialer window automatically closes after you click Dial.
- 7. (Optional) Before dialing the number, Interaction Manager might open the Billing Project window, depending upon your project requirements. If it does, then:
 - a. Select a Billing Project from the Name list.
 - b. Click OK.
 After the call connects:
 - Your status changes to Busy.
 - Interaction information, such as the contact's name and extension, appears in the New Direct Call window.
 - The Interaction Information tab opens in your workspace, showing more information about the contact.
 When the contact accepts the interaction:
 - The New Direct Call window changes to the Active Call window and provides the links to the actions that you can perform.
 - The phone icon changes to show that you are busy talking.

Making a PBX Call

If your company uses a private telephone network to provide telephone connections between internal stations and external phone networks, you might be able to make a call using your Private Branch Exchange (PBX).

To make a PBX call

1. From the Toolbar, click Dialer.
The Create New Interaction window opens with the Dialer tab.
2. From the list, select PBX Call.
3. From the country list, select a country code, then do one of the following:
 - Type the phone number in the box.
 - Click each digit of the phone number on the Dialer's keypad.
 - Use the Speed Dial tab.

For more information on using unique key combinations to initiate a call, see ["Using Speed Dial"](#) on page 18-5.

Interaction Manager recalls the numbers that you dial during your current session.

4. Click the down arrow to access the previous numbers.
5. Click Dial.

Interaction Manager dials the number.

6. Select the Close After Dialing check box so that the Dialer window automatically closes after you click Dial.
7. (Optional) Before dialing the number, Interaction Manager might open the Billing Project window, depending upon your project requirements. If it does, then:
 - a. Select a Billing Project from the Name list.
 - b. Click OK.

When the call connects:

- Your status changes to Busy.
- Interaction information, such as the contact's name (if known) and phone number, appears in the New PBX Call window.
- The Interaction Information tab opens in your workspace, showing more information about the contact, if available.

When the contact accepts the interaction:

- The New PBX Call window changes to the Active PBX Call window, and provides the links to the actions that you can perform.
- A phone handset and the word *Talking* appear.

Making an IP or VoIP Call

If you have privileges, you can make calls to software phones running on a computer.

To make an IP or VoIP call

1. From the Toolbar, click Dialer.

The Create New Interaction window opens with the Dialer tab.
2. From the list, select IP Call.
3. From the Type list, select either SIP (Session Initiation Protocol) or H323 (packet-switched network call), then do one of the following:
 - Type the phone number in the box.
 - Click each digit of the phone number on the Dialer's keypad.
 - Click the Speed Dial tab.

For more information on using unique key combinations to initiate a call, see ["Using Speed Dial"](#) on page 18-5.

Note: To dial a SIP number, use the format: sip:<IP Address>

Interaction Manager recalls the numbers you dial during your current session. Click the down arrow to access the previous numbers.

4. Click Dial.

Interaction Manager dials the number.

5. Select the Close After Dialing check box so that the Dialer window automatically closes after you click Dial.

6. (Optional) Before dialing the number, Interaction Manager might open the Billing Project window, depending upon your project requirements. If it does, then:
 - a. Select a Billing Project from the Name list.
 - b. Click OK.

When the call connects:

- Your status changes to Busy.
- Interaction information, such as the contact's name (if known) and phone number, appears in the New IP/VoIP Call window.
- The Interaction Information tab opens in your workspace, showing more information about the contact, if available.

When the contact accepts the interaction:

- The New IP/VoIP Call window changes to the Active IP/VoIP Call window, and provides links to actions you can perform.
- A phone handset and the word *Talking* appear.

Using Speed Dial

Your administrator can assign long numbers that your company often uses to unique key combinations, which you can select instead of typing the entire number.

To use speed dial

1. From the Toolbar, click Dialer and, instead of entering the number, click the Speed Dial tab.
2. From the selection box, select All, or a list name provided by your administrator.
3. Double-click the appropriate key code.

Interaction Manager dials the number stored for the key.

Redialing a Number

No matter what kind of call you make (internal, external, PBX, or IP), you can redial the last number.

To redial a number

- Do one of the following:
 - Select Redial from the Action menu on the Toolbar.
 - Click Redial in the Dialer's Create New Interaction dialog box.

The last number that you dialed appears in the Interaction Control Bar when the connection is completed.

Accessing the Tutorial

This chapter explains how to access the new tutorial option (multimedia). It includes the following topic:

- [Accessing the Tutorial](#)

Accessing the Tutorial

After new upgrades, and when you log in, you might be offered the option to view a tutorial about the new features or changes made with the update. For more information on logging in, see "[Starting and Logging In](#)" on page 2-1.

- Do one of the following when you log in:

- Accept the offer.

The tutorial starts. When you complete it, Oracle Contact On Demand will automatically log you in to Interaction Manager.

- Decline the offer. You must log in again.

If you want to view the tutorial at another time, you can review previous tutorials from the Action menu.

Note: In addition to the update tutorials, Oracle Contact On Demand-training modules might also be available from the Actions menu.

Using the Keyboard Shortcuts

This appendix lists the keyboard shortcuts. It includes the following topic:

- [Keyboard Shortcuts](#)

Keyboard Shortcuts

[Table A-1](#) shows the keyboard shortcuts (hot keys) you can use to perform various functions. For example, to load the interaction history, press the CTRL key at the same time as you press K.

Table A-1 *Keyboard Shortcuts*

Keyboard Shortcut	Function
F1	Interaction Manager Help
F10	About Interaction Manager
ALT+B	Available
ALT+C	Conference
ALT+G	Change Status
ALT+I	Missed Calls
ALT+J	Configuration
ALT+K	Check Messages
ALT+L	Logout
ALT+M	Clear Display
ALT+M	Voice Mail
ALT+N	Accept Interaction
ALT+O	Open
ALT+O	Hold
ALT+P	Push To Client
ALT+R	Start Record
ALT+U	URL Library
ALT+U	Mute
ALT+U	UnMute
ALT+V	View

Table A–1 (Cont.) Keyboard Shortcuts

Keyboard Shortcut	Function
ALT+W	Transfer To
ALT+X	Chat Response
ALT+Y	Make This My Last Call
ALT+Z	Disconnect
CTRL+B	Bill Call To
CTRL+G	Dial
CTRL+H	Hang Up
CTRL+J	Auto Redial
CTRL+S	Connects to the server
CTRL+S	Disconnects from the server
CTRL+T	Company Directory
CTRL+U	Do Not Call

Searching and Sorting Tips

This appendix describes the searching and sorting techniques that you can use. It includes the following topics:

- [Searching and Sorting Techniques](#)
- [Searches for All Field Values](#)
- [Multiple Sorting](#)

Searching and Sorting Techniques

You can search for, and then sort information in Interaction Manager using several techniques, including:

- Search by Matching Any Number of Any Characters using an asterisk (*) as a wildcard character.
- Search for All Information in a Field using a percent sign (%).
- Sort results using multiple columns (sort within a sort).
- Search using a wildcard character.
- You can type an asterisk (*) anywhere in a word or number for which you are searching (that is, in the beginning, middle or end), which matches any number of characters.

Search Examples

Here are some examples:

- If users typed State/Province information as Ca, CA, Calif., and California, you can find all contacts in California by entering the following into the State/Province field:
ca*
- To find all contacts with work numbers in the 212 area code, enter the following into the Work field:
212*
- To find any contact with a title that contains the word *Sales*, enter the following into the Title field:
sales

Searches for All Field Values

When searching for a contact, you can type a percent sign (%) into a field to return all contacts for that field. If there are too many matches, a message appears requesting more search criteria to reduce the possible number of matches.

Multiple Sorting

When your search produces a large list of possible matches, you can sort them.

Do one of the following:

- Click a Column Heading, which helps you find the result faster. Click the same column heading again to reverse the sort order (from ascending to descending, and from descending to ascending).
- To do a multi-sort (or sort within a sort), press and hold the CTRL key while clicking another column.

For example, to sort first by Last Name, click the Last Name column heading. To sort by State while still keeping the last names in order, press and hold the CTRL key while clicking the State/Province heading.

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