GENESYS™

Agent Desktop Agent's Guide

Agent Desktop (v9)

11/28/2021

Contents

Agent Desktop lets contact center agents communicate with customers and team members through phone calls and Genesys Digital channels.

Related documentation:
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Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

- Some Workspace Agent Desktop features are available only for Genesys Multicloud CX users.

- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

Tip

Are you experiencing any of the following issues? Contact your supervisor, Genesys administrator, or IT personnel. These issues are related to your organization's settings or network.

- Cannot login.

- Channels out of service.

- Servers out of service.

- No ring tone when a new interaction is directed to you.

- Calls dropping.

For other issues, check the FAQ below.
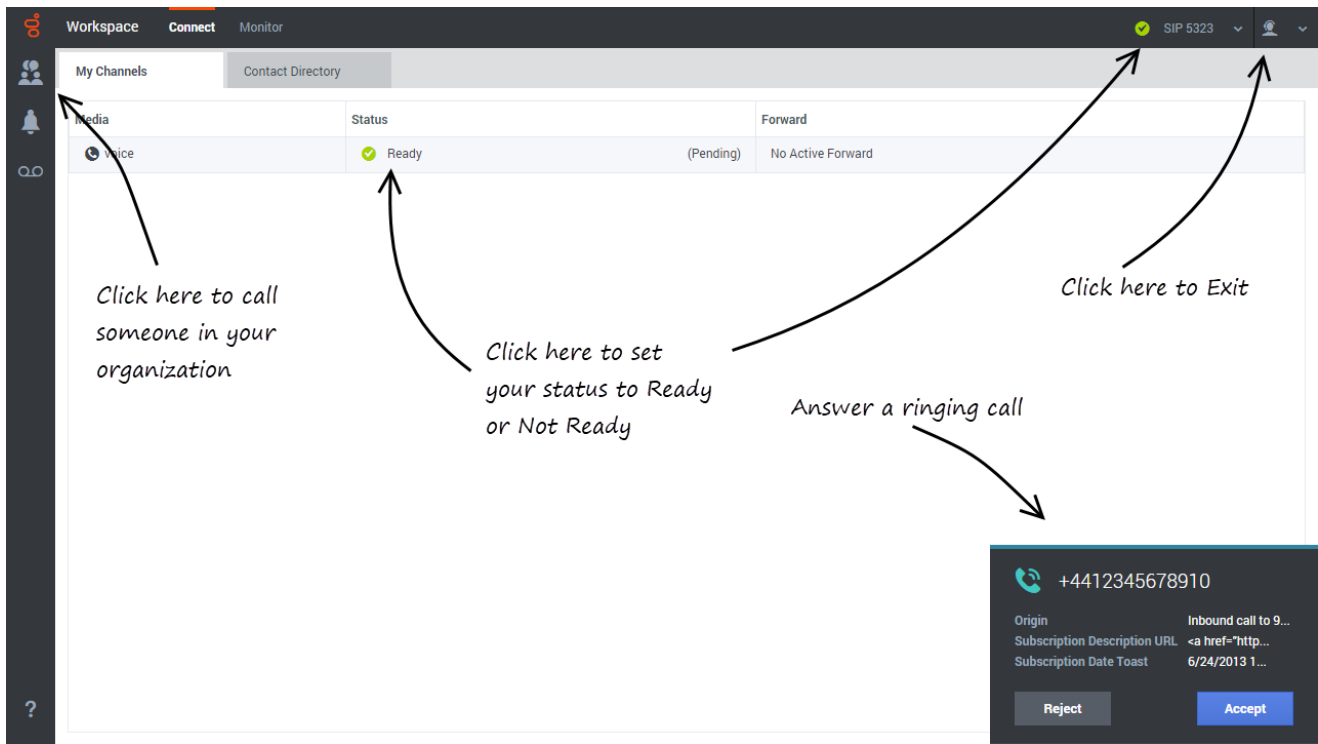
Workspace Agent Desktop enables you to...

- respond to or contact customers through the voice and Genesys Digital channels
- get help from team members
- make sure that you are meeting your organization's expectations (Statistics and KPIs)

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Lost? Refer to the Navigating Agent Desktop article.

Link to video

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels

Are you a **supervisor**? You can monitor agents, calls, and chat interactions.

About This Help

The following topics explain some of the main features of Agent Desktop:

About Agent Desktop

How to navigate Agent Desktop

How to use Agent Desktop

How to login to Agent Desktop

Watch "How to" videos

View Contact Center Statistics
and Your KPIs

Voice and Digital Interactions

Call interaction features

How to handle a call

Inbound Chats

Inbound and outgoing email

In-progress and saved email

My Workbins

Call Tasks

Conference Calls

Transfer Calls

Consultation Calls

Recording Calls

Calling inside your organization

Calling an Agent Group

Managing Your Status and Communications

Manage your status

Launch new interactions

Manage your channels

Managing Contacts

The Contact Directory

Finding Contacts

Contact Interaction History

Manual Contact Assignment

Managing Interactions and History

Interaction Search

My Interaction History

Customer Journeys
Use Co-browse to guide your customer's journey
Use Genesys Predictive Engagement to track your customer's journey

Frequently Asked Questions (FAQ)

How do I find my extension?

Your extension can be found in the **My Channels** tab. Hover your mouse pointer over the voice channel and the tip text displays your extension. In this example, the agent's extension is 5320.

How do I change my password?

- If this is your first time logging on, you might have to change your password. This happens automatically. A message box is displayed that walks you through the steps. If you are not sure about any of the prompts, your administrator or supervisor can provide you with the details.

- If you need to change your password, send a request to your supervisor requesting a change password email. You supervisor will reset your password, and you will receive a confirmation email. Follow the instructions in the email to change your password.

What happens when I lose connection?

Sometimes network issues can cause Agent Desktop to lose connection to the system. Don't worry, see the Handling a system disconnection article to find out what to do!

Browser specific notifications and issues

Some browsers require specific actions to ensure that you receive notifications from Workspace Agent Desktop and the Genesys system. For detailed information about allowing notifications for your browser, review the documentation specific to the browser and version that you are using. The following are some guidelines:

- **Chrome**: When you login, you might see a browser notification asking whether to allow or deny notifications from the Workspace Agent Desktop URL. Click **Allow**.

- **Firefox up to v71**: When you login , you might see a browser notification asking whether to show notifications from the Workspace Agent Desktop URL. Click **Show for this session** or **Always show**.

- **Firefox v72 and higher**: When you login, you might have to click the **Notifications** icon in the address bar to display the dialog that enables you to allow notifications. You are not prompted to do this by the browser.

- **Edge**: When you login, you might see a browser notification at the bottom of window asking whether to show notifications from the Workspace Agent Desktop URL. Click **Yes**.

If you still do not see any notifications, it is possible that the Workspace Agent Desktop domain notifications are blocked by your system. If this is the case, you must explicitly allow notifications for the Workspace Agent Desktop domain.

- **Chrome**: To allow site notifications perform the following steps:

  1. Enter chrome://settings/content/siteDetails?site=https:// (for example: gwa-usw1.genesyscloud.com)

  2. In the **Privacy and security** settings, select **Allow** from the **Notifications** setting menu.

- **Edge**: To allow site notifications perform the following steps:

  1. Enter edge://settings/content/siteDetails?site=https:// (for example: gwa-usw1.genesyscloud.com)

  2. In the **Privacy and security** settings, select **Allow** from the **Notifications** setting menu.

- **Firefox**: To allow site notifications perform the following steps:

  1. Click the lock icon next to the Workspace Agent Desktop URL in the navigation bar.

  2. Click the arrow next to **Connection Secure** to show connection details.

  3. Click **More information**.

  4. Select the **Permissions** tab.

  5. Next to **Send Notifications**, deselect **Use Default**.

  6. Click **Allow**.

  7. Close the **Page Info** window.

Log in, log out, log on, log off, and exit, what's the difference?

You log in and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.

Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the Global Status menu.

I keep clicking Hang up (release call) by accident

In some environments, there is no confirmation dialog after you click **Hang up**. That means as soon as you click **Hang up** the call ends. If you find that you are accidentally hanging up on customers when you intend to only put them on hold or transfer the call, ask your supervisor or administrator to set the **voice.prompt-for-end** Workspace option to **true** to resolve this issue.

What are Skills?

- Skills are things that you are good at, like product specialization or a language that you speak.

- When your supervisor sets up your account, she or he assigns skills and skill levels based on what you can do.

- Skills are used to direct calls to you. If someone calls about a product that you are specialized on, the call will be directed to you and others with the same skill on that product.

How can I find my Call Stats?

- Use the Performance Tracker to see your call activity, worktime, and other reports.

- Use the Dashboard tab to see the list of statistics about the Routing Points, Queues, and other contact center objects.

How do I transfer, conference, or consult on my call?

Agent Desktop lets you start a conference call with someone in your company, transfer your call to another agent or your team lead, or start a consultation call with another member of your team. The call controls at the top of the voice call interaction toolbar open the Team Communicator, a universal lookup tool, that lets you search for and dial other team members. You can also use the Team Communicator to call someone inside your organization.

How do I call back a contact?

You can also use the **Party Action** menu or Team Communicator to call back the contact if you become disconnected.

What kind of calls and interactions does Agent Desktop let me handle?

Agent Desktop handles inbound voice calls, Outbound calling campaigns, and Digital Channels: chat, email, social media, and more. For a list of the channels the Workspace Agent Desktop supports, refer to Channels and the Channels tab.

What if the wrong contact is assigned to an interaction?

Agent Desktop might be set up to let you change which contact an interaction is assigned to. Sometimes when a new call or chat comes in, Agent Desktop does not assign it to the correct person in your contact database. Use the **Change Contact** button to pick a different contact.

What if the contact information is anonymous?

In some call centers, voice interactions are anonymous to protect contact Personally Identifiable Information (PII). If you do not assign a contact to an anonymous call, the call is not stored in the contact database and so is not available in any History view. In some contact centers, a routing strategy is used to assign a contact ID to an anonymous contact. In this case the call is available in the **My History** view; however, if you select a call from an anonymous caller, the contact name and phone number are displayed as **Anonymous** in the **Details** tab. You cannot call an anonymous contact.

I'm a Team Lead, what can I do with Agent Desktop?

Agent Desktop has special features for those of you who are team leads and supervisors. You can:

- Monitor calls and chat (silently listen in)

- Coach calls and chat (whisper coaching)

- Barge-in to calls and chat (joining the call)

Supported browsers

You can use any of the following browsers to run Agent Desktop:

- Chrome 75+

- Firefox 68+

- Firefox ESR 60.9

- Microsoft Edge

- Microsoft Internet Explorer 11 (Not supported for Genesys Multicloud CX)

What next?

- Getting started

- Watch "How to" videos

- Navigating Agent Desktop

- Calls

Top 5 topics

1. Getting Started

2. Navigating Agent Desktop

3. Calls

4. Contacts

5. Contact and interaction history