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Manage your Contact Center in Agent Setup

[Agent settings overview](#)



- Administrator

Learn about the features and controls that enable an agent to handle interactions and other key tasks.

Related documentation:

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When it's time to enable all the features and controls that make your agent's job possible and manageable, you should think of the agent's workday as a series of stages. In each stage, there's a myriad of options and controls that enable the agent to complete that stage before moving on to the next. Let's look at the stages and the configurable options that apply to each.

Logging in

The first thing an agent does is log in. This can include login to Agent Workspace, Team Communicator email, the intranet, and other internal resource sites.

- Global login
- Single Sign-On
- Auto login

Receiving a call or message

When an agent receives a call or message, the information the agent receives about the incoming call or message and the actions the agent takes from that point on is determined by the options you configure.

- Screen Pop options
- Case and toast data
- Accepting and rejecting a call - Auto answer and decline options:
 - Voice
 - Email
 - Chat
 - Facebook
 - Twitter
- Caller ID options (See also Add and manage Caller ID)
- Outbound options

Call handling and control

This stage includes everything from how the agents answer, make, or schedule a call, forward a call or email, switch between channels, handle call conferencing, how they place a call on hold, and so on.

- Forwarding a voice call
- Hold options for the Voice channel
- Conferencing options for the Voice channel
- Transferring options
- Call and screen recording options for Voice
- Microphone and speaker options for Genesys Softphone

Finding answers

There are going to be times when agents will need to obtain information from an internal or external source in the middle of the a customer interaction. The agent might obtain this information from an internal source, such as another agent, supervisor, or department, or the agent might look to external sources, such as websites, for the answers.

Internal:

- Standard response library
- Interaction history search options

External

- External URLs

Working with contacts

Agents also deal with contact records – this is stored information about each and every contact they interact with. You'll need to determine how the agents will find these records and interaction history and whether they can create contact records.

Contacts and contact management.

- Contacts and contact management options
- About Global Favorites

Configurable options by channel:

- Voice
- Chat
- Email

Post-interaction tasks

When an interaction with a customer ends, the agent will always have wrap-up work to do. This can include dispositioning the interaction, making notes about the interaction, scheduling a followup call, etc. Here are the related tasks:

Dispositions: General information about dispositions

Disposition options are available for all channels:

- Voice
- Email
- Chat
- Facebook
- Twitter
- Workitem

Options related to post call duration and marking records after an interaction has ended are available for the Voice channel.

Activity reports and statistics:

- My Channels options
- Agent Workspace statistics
