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## Manage your Contact Center in Agent Setup

**Transactions**

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- Administrator

Manage business attribute overrides that are applied at a transactional level, such as a call or a chat.

### Related documentation:

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#### Important

Agent Setup only supports Transaction List objects.

You can configure the following business attributes at the transaction level:

- Dispositions
- Case Data
- Toast Data
- Caller IDs
- Favorites

Select **Transactions** in the navigation menu to access the **Transactions** page. The **Transactions** main view lists the transactions only by name. Click the link for the transaction to view the details.

Use the following procedures to create and configure transactions.

## Adding a new transaction



Folder: / Transaction name Transaction name Add Cancel

<input type="checkbox"/>	Name
<input type="checkbox"/>	UserPreference/default
<input type="checkbox"/>	Internal/Support
<input type="checkbox"/>	Internal/ORS

Click the **New Transaction** button, type a unique name in the **Transaction name** field, select a folder to store the transaction configuration, and then click **Add**. If you do not select a folder, the transaction is stored in the /default directory.

The name of the transaction is prefixed with the name of the folder. For example, UserPreference/. At this point, configuration is not complete. You need to add business attributes to the transaction.

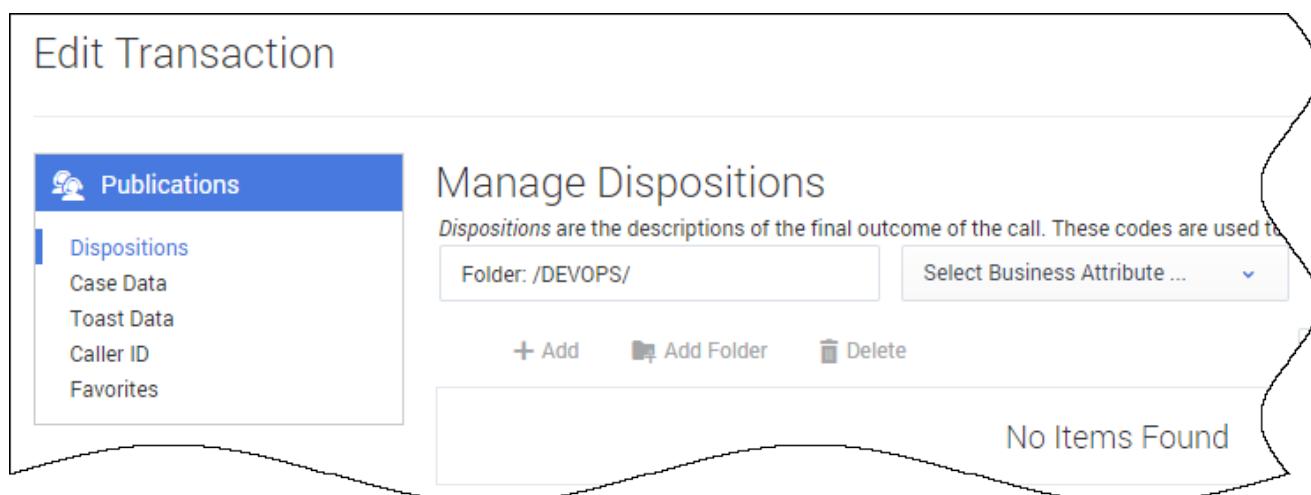
### Tip

You can manage folders from this page. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder icon



to create a new folder.

## Adding business attributes to a transaction



Edit Transaction

Publications

Dispositions

Case Data

Toast Data

Caller ID

Favorites

Manage Dispositions

Dispositions are the descriptions of the final outcome of the call. These codes are used to...

Folder: /DEVOPS/ Select Business Attribute ...

+ Add Add Folder Delete

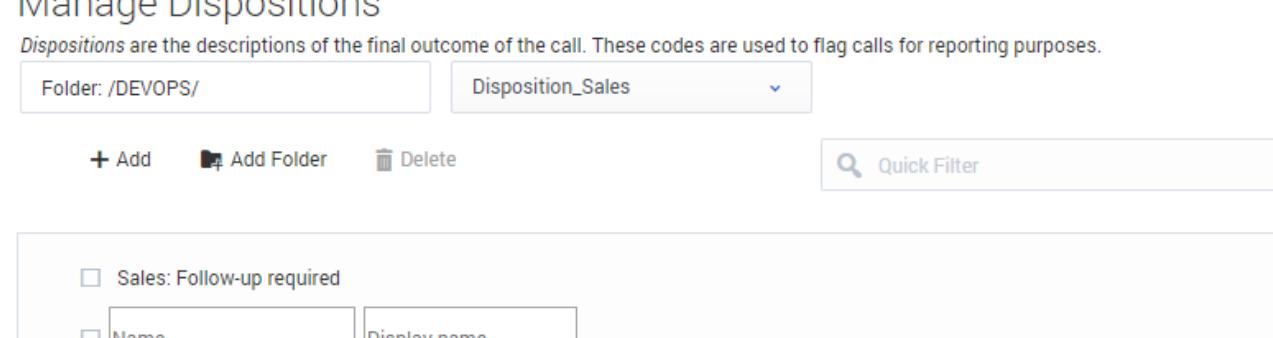
No Items Found

To edit a transaction, click the link in the **Name** column. If the transaction has no configured business attributes, as is the case when you add a new transaction, you are prompted to complete the configuration. Follow the prompts to add **Dispositions**, **Case Data**, **Toast Data**, **Caller ID**, and **Favorites** business attributes. After you add the business attributes, you can define them.

## Managing dispositions

### Manage Dispositions

Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes.



The screenshot shows a user interface for managing dispositions. At the top, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Disposition\_Sales'. Below these are buttons for '+ Add', 'Add Folder', and 'Delete'. To the right is a 'Quick Filter' search bar. The main area displays a list of disposition codes. Each code has a checkbox next to it, followed by the name and display name. For example, the first code is 'Sales: Follow-up required' with 'Name' and 'Display name' fields.

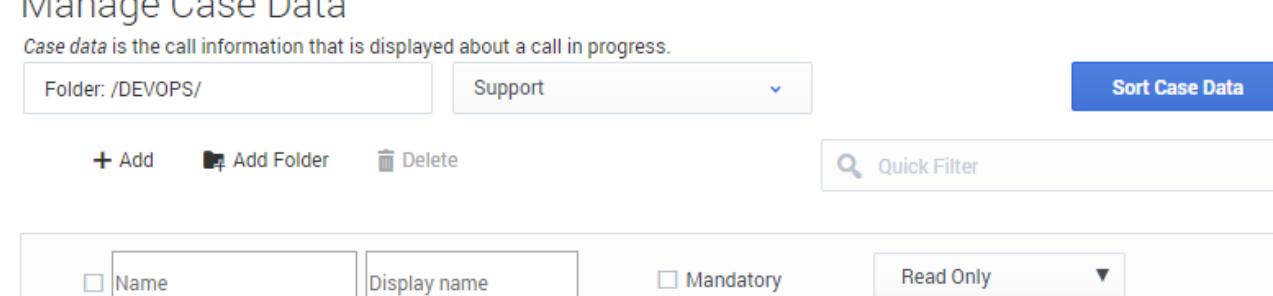
Disposition	Name	Display name
<input type="checkbox"/> Sales: Follow-up required		

Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes. To learn more about how to manage dispositions, see [Dispositions](#).

## Managing case data

### Manage Case Data

Case data is the call information that is displayed about a call in progress.

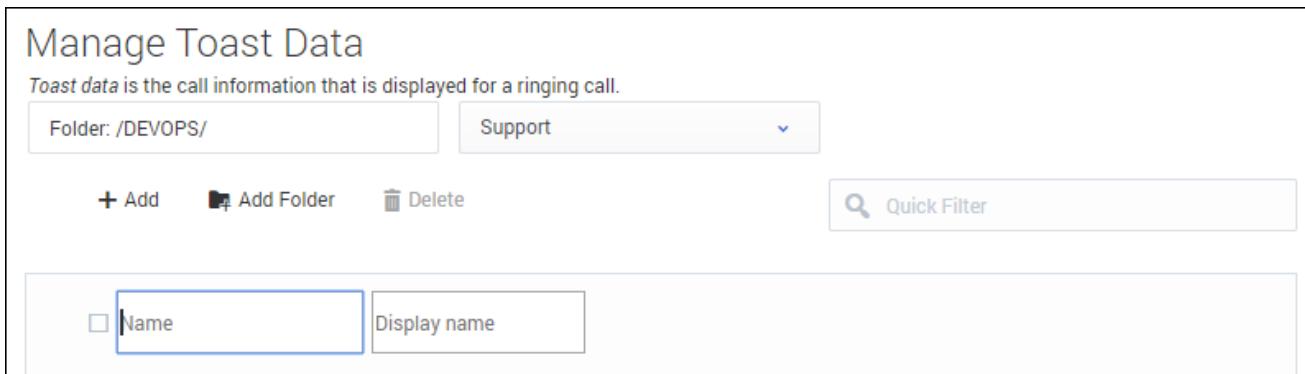


The screenshot shows a user interface for managing case data. At the top, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Support'. To the right is a 'Sort Case Data' button. Below these are buttons for '+ Add', 'Add Folder', and 'Delete'. To the right is a 'Quick Filter' search bar. The main area displays a list of case data items. Each item has a checkbox next to it, followed by 'Name' and 'Display name' fields, and checkboxes for 'Mandatory' and 'Read Only'. For example, the first item is 'Name' with 'Display name' and 'Read Only' checked.

Case Data	Name	Display name	Mandatory	Read Only
<input type="checkbox"/> Name			<input type="checkbox"/>	<input checked="" type="checkbox"/>

On the Manage Case Data screen, you can specify the information to be displayed to the agent when an interaction is transferred to them. To learn more about how to manage case data, see [Case and toast data](#).

## Managing toast data



Manage Toast Data

*Toast data is the call information that is displayed for a ringing call.*

Folder: /DEVOPS/ Support

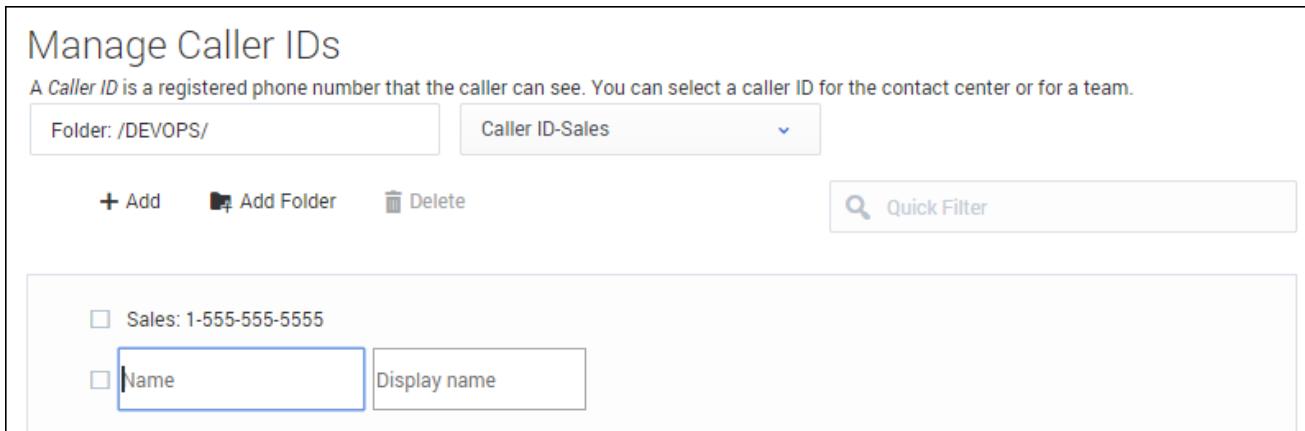
+ Add Add Folder Delete

Quick Filter

Name	Display name
<input type="checkbox"/> Sales	Sales

On the Manage Toast Data screen, you can specify the information to be displayed to the agent when they receive a call, chat, or other interaction. To learn more about how to manage toast data, see [Case and toast data](#).

## Managing caller IDs



Manage Caller IDs

*A Caller ID is a registered phone number that the caller can see. You can select a caller ID for the contact center or for a team.*

Folder: /DEVOPS/ Caller ID-Sales

+ Add Add Folder Delete

Quick Filter

Name	Display name
<input type="checkbox"/> Sales	Sales

You can allow agents to select from a predefined list of caller IDs. The selected caller ID is then displayed to the person receiving the call when the agent consults, conferences, or transfers a call. To learn more about how to manage caller IDs, see [Add and manage Caller ID](#).

## Managing favorites

### Favorites

Favorites is a list of Agents, Agent Groups or external contacts that group members frequently dial. This list provides a click-to-call list of these numbers on Agent Desktop.

[Add Favorites](#)

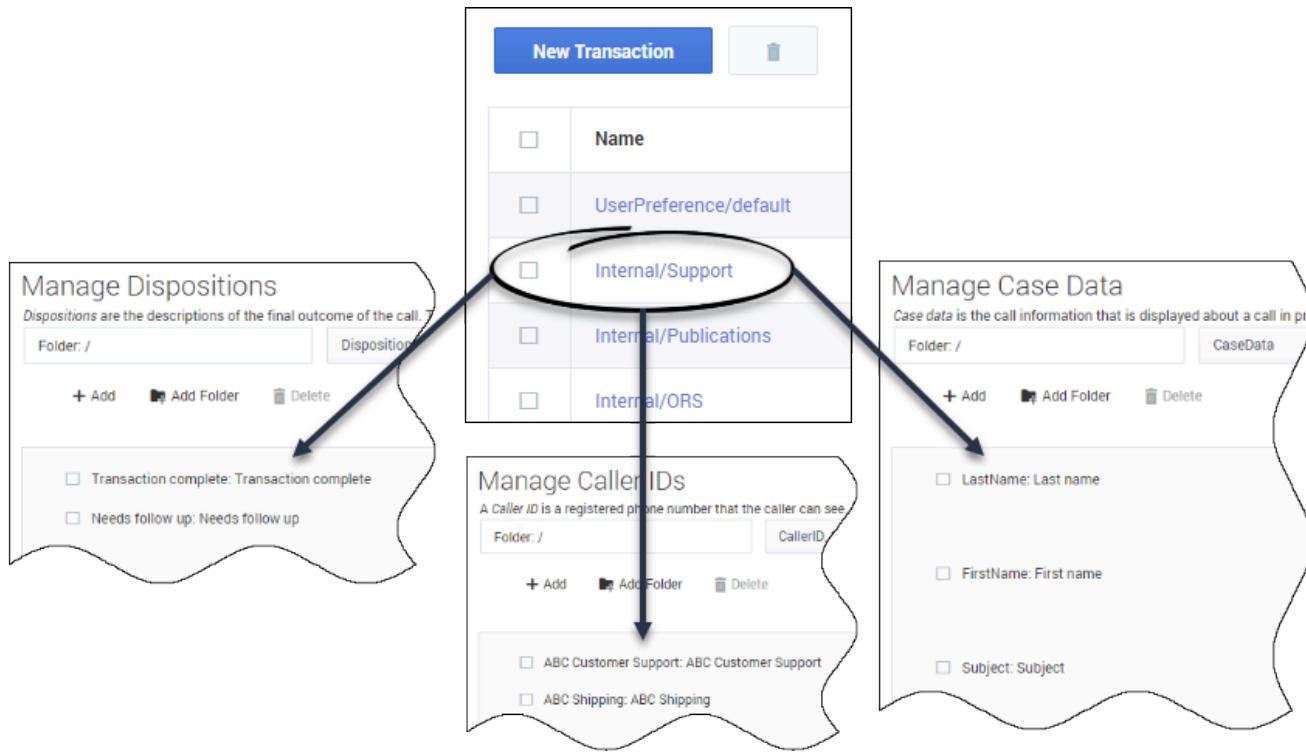
#### Favorites List (0)

 Filter Items	 Delete
No Contacts Found	

On the **Favorites** screen, you can create a list of agents, agent groups, or external contacts that agent group members frequently dial. This list provides a click-to-call list of these numbers on Agent Workspace. To learn more about how to manage favorites, see Global Favorites.

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What should a configured transaction look like?



In this example, the transaction includes the following business attributes:

#### **Dispositions:**

- Transaction complete
- Needs follow-up

#### **Case Data**

- First name
- Last name
- Subject

#### **Caller IDs**

- ABC Customer Support
- ABC Shipping

#### **Use Case**

In Agent Workspace, you have the ability to override desktop options by setting the value of a KVP to

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the name of a transaction list object. The desktop option is `interaction.override-option-key`. In the inbound or outbound routing application, you set the value of the identified key to the name of the transaction list object and the desktop options in the transaction list object are used instead of the Agent Workspace application or agent group objects.