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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

The dialog box has a header with a 'Folder: /' field, a 'Transaction name' field, and 'Add' and 'Cancel' buttons. Below the header is a table with a checkbox column and a 'Name' column. The table contains three rows: 'UserPreference/default', 'Internal/Support', and 'Internal/ORS'.

<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

The page is titled 'Edit Transaction'. On the left is a sidebar with a 'Publications' header and a list of items: 'Dispositions', 'Case Data', 'Toast Data', 'Caller ID', and 'Favorites'. The 'Dispositions' item is selected. The main content area is titled 'Manage Dispositions' and contains a description: 'Dispositions are the descriptions of the final outcome of the call. These codes are used to...'. Below the description are three fields: 'Folder: /DEVOPS/', 'Select Business Attribute ...', and a '+ Add' button. There are also 'Add Folder' and 'Delete' buttons. At the bottom, a message says '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

The screenshot shows the 'Manage Dispositions' interface. At the top, it says 'Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes.' Below this, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Disposition_Sales'. To the right of these fields are three buttons: '+ Add', 'Add Folder' (with a folder icon), and 'Delete' (with a trash icon). Further right is a 'Quick Filter' search bar. Below these elements is a table with two columns: 'Name' and 'Display name'. The first row in the table has a checkbox labeled 'Sales: Follow-up required' in the 'Name' column.

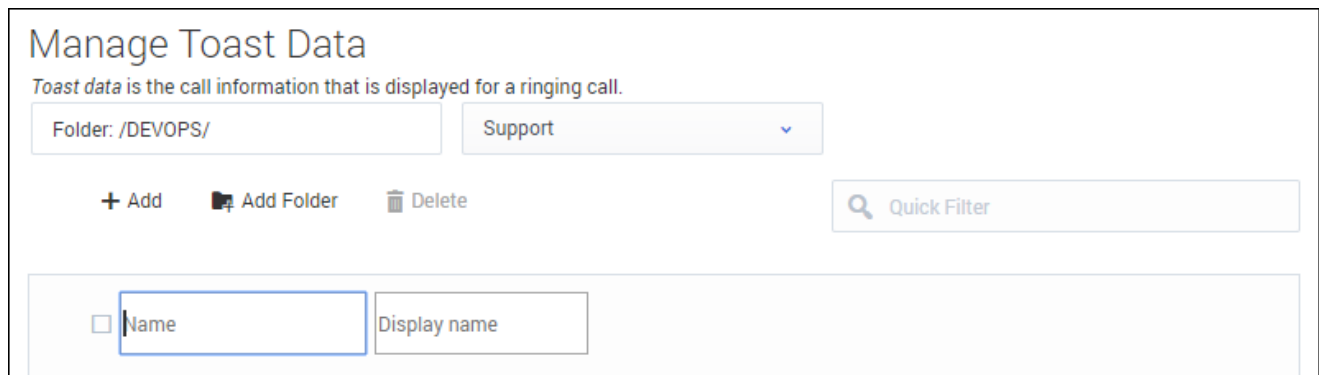
Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes. To learn more about how to manage dispositions, see Dispositions.

Managing case data

The screenshot shows the 'Manage Case Data' interface. At the top, it says 'Case data is the call information that is displayed about a call in progress.' Below this, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Support'. To the right of these fields is a blue button labeled 'Sort Case Data'. Below these elements are three buttons: '+ Add', 'Add Folder' (with a folder icon), and 'Delete' (with a trash icon). Further right is a 'Quick Filter' search bar. Below these elements is a table with four columns: 'Name', 'Display name', 'Mandatory', and 'Read Only'. The first row in the table has a checkbox in the 'Name' column.

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.

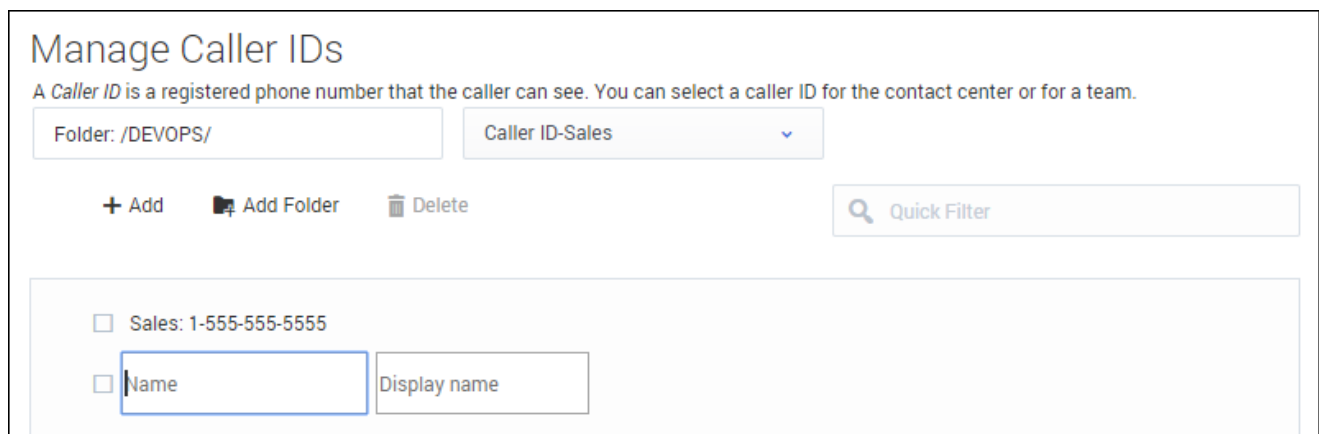
Managing toast data



The screenshot shows the 'Manage Toast Data' interface. At the top, there's a title 'Manage Toast Data' followed by a subtitle: 'Toast data is the call information that is displayed for a ringing call.' Below this, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Support'. Underneath these are three buttons: '+ Add', 'Add Folder' (with a folder icon), and 'Delete' (with a trash icon). To the right is a 'Quick Filter' search bar. The main area contains a table with two columns: 'Name' and 'Display name'. The 'Name' column has a blue border and a cursor, indicating it's the active field.

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



The screenshot shows the 'Manage Caller IDs' interface. At the top, there's a title 'Manage Caller IDs' followed by a subtitle: '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.' Below this, there are two input fields: 'Folder: /DEVOPS/' and a dropdown menu set to 'Caller ID-Sales'. Underneath these are three buttons: '+ Add', 'Add Folder' (with a folder icon), and 'Delete' (with a trash icon). To the right is a 'Quick Filter' search bar. The main area contains a table with two columns: 'Name' and 'Display name'. The first row in the table is 'Sales: 1-555-555-5555'. The 'Name' column has a blue border and a cursor, indicating it's the active field.

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](#).

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

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.