GENESYS™

Manage your Contact Center in Agent Setup

Global favorites

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  - Administrator

Create and maintain a list of Global Favorites agents can access quickly in the Team Communicator in Agent Workspace.

Related documentation:
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As a contact center administrator, you can create and maintain a list of Favorites, which are contacts and internal targets that your agents can access quickly in the Team Communicator. To see how agents use global favorites (also known as corporate favorites) in Agent Workspace, see Using Favorites in the *Agent Workspace Agent's Guide*.

In addition to managing favorites from the **Agent Desktop** Settings, you can also manage favorites on the **Agent Groups** page and the **Add/Manage User** window. No matter from what screen you add a favorite, you can include the favorite in the list of shareable favorites to be reused in all places where Global Favorites (or Personal Favorites for user accounts) are available for configuration in Agent Setup.

> Tip
>
> - When editing an existing Favorite, the changes are applied to all Agent Groups who have that Favorite assigned to them in their Global Favorite list.
>
> - When deleting a Favorite from the Favorites Pool, it is removed from all Agent Groups who have that Favorite assigned to them in their Global Favorite list.
>
> - When deleting a Favorite from an Agent Group, it is only removed from that Agent Group's Global Favorite list, It is not removed from the Favorites Pool.

Scenario

To help demonstrate how this all works, let's observe how Henry, a contact center administrator, adds a favorite to one agent group and then applies the same favorite to another agent group.

Henry is configuring Agent Workspace settings for agent_group_bu_3. As part of the setup, he needs to create a list of contacts to be displayed in the Team Communicator for each agent that belongs to the group. For the purposes of this demonstration, he'll add only one favorite. In reality, he would set up as many favorites as required to meet the needs of his contact center. The goal is to include a

quick way for agents to transfer an interaction to an agent who can speak French.
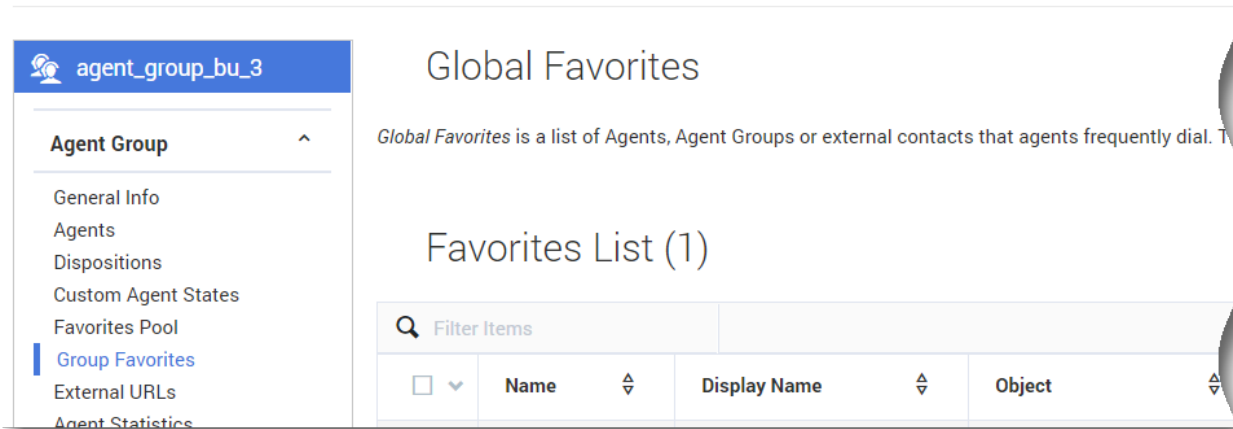
These are the steps he takes:

1. Access the Agent Group (**Agent Groups> agent_group_bu_3**)
2. Click **Agent Group > Group Favorites**.

3. Henry adds the French skill as a new favorite in the global list. He:

   a. Clicks **Add Favorites > Global Favorites Pool > Create Favorite**

   b. On the **Manage Favorites** window, he selects **Skill**.

   c. Types **French** in the **Name** and **Display Name** fields.

   d. Chooses **French** from the **Favorite Object** field.

   e. Selects a category. Categories organize how the favorites are displayed in Team Communicator. Henry selects **Quick**.

   f. At this time, Henry chooses not add any **Key/Value** pairs.

4. He clicks **Save**.

The new favorite (French) is now added to the global favorites list on the **Manage Favorites** window. However, at this point, the new favorite is not assigned to "agent_group_bu_3" yet. It's simply available in the global list. He now needs to add the new favorite to "agent_group_bu_3". Henry clicks **Add Favorites**, and uses the Filter field to search for the new **French** favorite. Henry then selects the check box beside **French** and clicks **Save**.

Result

When Henry clicks **Save**, the **Manage Favorites** window closes and the new favorite is added to the **Group Favorites** list for "agent_group_bu_3", as shown.

If Henry wishes to add **French** as a group favorite for any other Agent Group, all he needs to do is:

1. From the main **Agent Group** tab at the top, click the **Agent Group** from the list.
2. From the left-hand menu, click **Agent Group > Group Favorites** to open the global list of favorites.
3. Click **Add Favorites**
4. Select **French** from the **Manage Favorites** list and click **Save**.
5. Finally, click **Save** from the **Global Favorites** window.

Now that French is listed in the global favorites list, Henry has the option in the future to easily add **French** as a personal favorite for other agent groups, individual users, or all users in the contact center.

Favorites Pool

Through the Favorites Pool, you can add, delete, and edit the global favorites available in your contact center.

- To add a new Favorite to the Pool, click **Create Favorite**, add in all the required information in the **Manage Favorites** window, and then click **Save**.

  > - Tip
  >
  >   When you choose **Custom** from the **Type** field, you get the addition of a **Phone Number** field.

- To delete a Favorite from the Pool, Use the **Filter Items** field to search for the Favorite **Name**, click the check box next to its name, and then click the trash can icon to delete. A dialogue box opens asking you to confirm your selection.

- To edit a Favorite from the Pool, Use the **Filter Items** field to search for the Favorite **Name**, double click its name to open the **Manage Favorites** window, make changes to the **Name**, **Type**, or **Category**, and then click **Save** to save your changes.