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# Avaya Agent for Desktop Training

## What You'll Learn:

- Log In
- Main Screen
- Change Agent State
- Softphone/Headset
- Top Bar
- Action Bar
- Bottom Bar Widgets
- Accept an Incoming Call
- Hold/Unhold
- Transfer a Call
- Conference Call
- Disposition Codes
- Outbound Call
- Viewing Contact History
- Adding a Contact
- Log Out



# Training Expectations


- To make training beneficial and enjoyable to all, there are some guidelines that must be followed:
- Ask questions to seek clarification
- Be patient with others learning style
- Be respectful
- Do not talk while others are talking
- Be prepared to actively listen
- Be free of all distractions and ready to learn
- Keep negative comments and perceptions to yourself

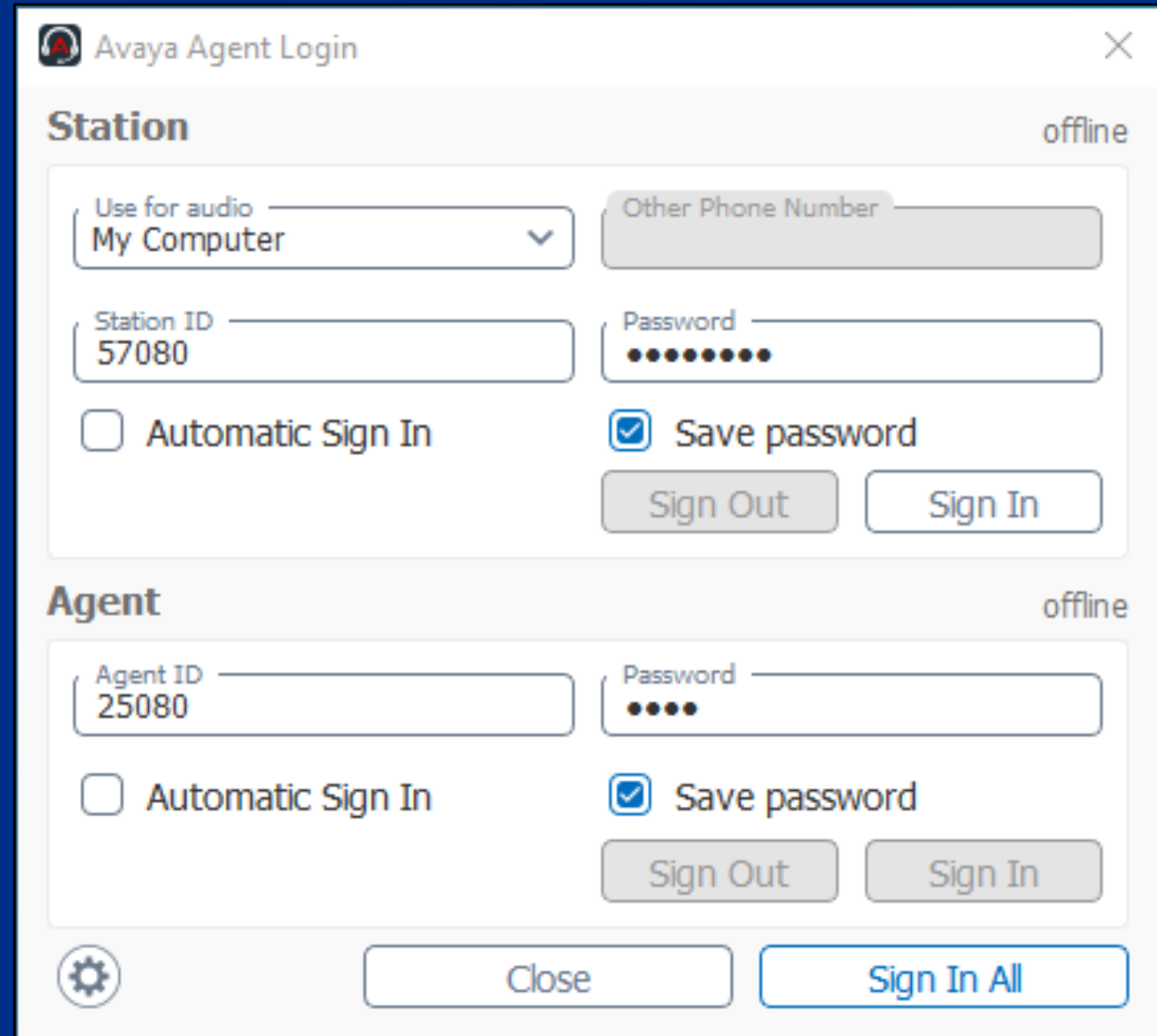


# Login

Log into Avaya Agent for Desktop (AAfD) to demonstrate top bar, action bar and button widget.

Enter the Station ID & Agent ID along with their corresponding password and click Sign In All.

 The login dialog box is hidden automatically when all services are logged in. You can click the **Show Login Dialog** in the tray icon or action bar items to view the login dialog screen again.



The image shows the Avaya Agent Login dialog box. It is titled "Avaya Agent Login" and has a close button (X) in the top right corner. The dialog is divided into two main sections: "Station" and "Agent".

**Station Section:**

- Station status: offline
- Use for audio: My Computer (dropdown menu)
- Other Phone Number: (text input field)
- Station ID: 57080 (text input field)
- Password: (password input field with 10 dots)
- Automatic Sign In:
- Save password:
- Buttons: Sign Out, Sign In

**Agent Section:**

- Agent status: offline
- Agent ID: 25080 (text input field)
- Password: (password input field with 4 dots)
- Automatic Sign In:
- Save password:
- Buttons: Sign Out, Sign In

**Bottom Section:**

- Settings icon (gear)
- Close button
- Sign In All button (highlighted in blue)

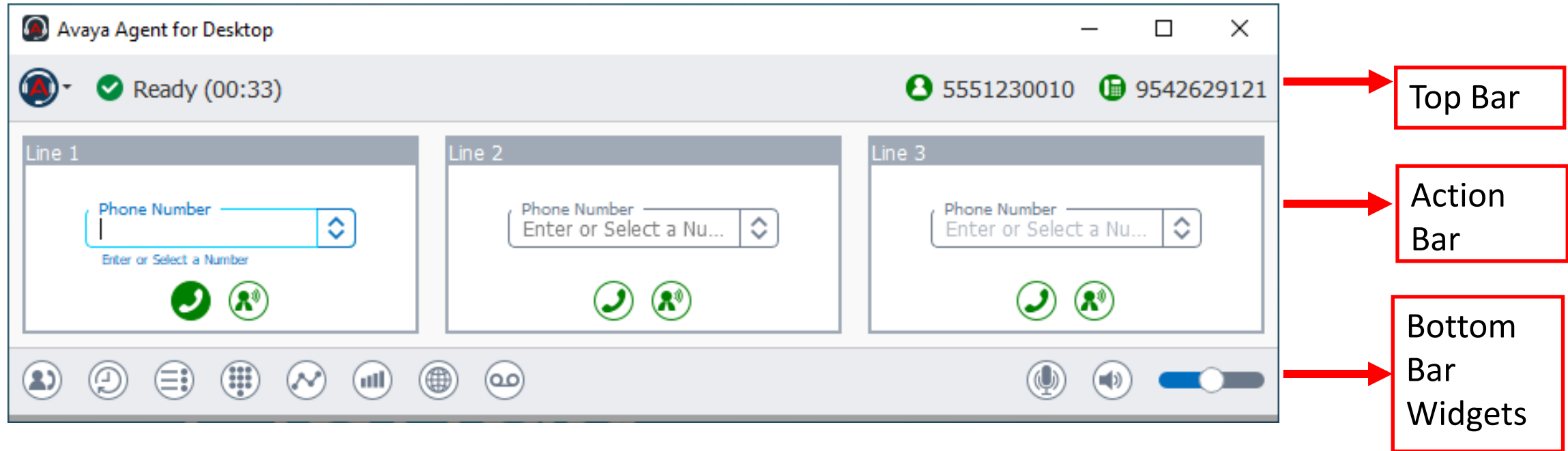
# Main Screen

The three components of the main screen include the top bar, action bar and button widgets.

💡 The login dialog box is hidden automatically when all services are logged in. You can click the **Show Login Dialog** in the tray icon or action bar items to view the login dialog screen again.



# Main Screen



# Change Agent States

When you log in to Avaya Agent for Desktop, the system changes the agent state from **Offline** to the default **Auxiliary** state. You must then change the agent state to **Ready** mode to start receiving ACD calls.

## STEPS:

- In the top bar, click the **Agent State** drop-down arrow.
- In the menu, click one of the following options and select the applicable reason code:
  - **After Call Work**: To change the agent state for an after call work.
  - **Auxiliary**: To change the agent state for an Aux-Work.
  - **Log Out**: To change the status to the logout mode.

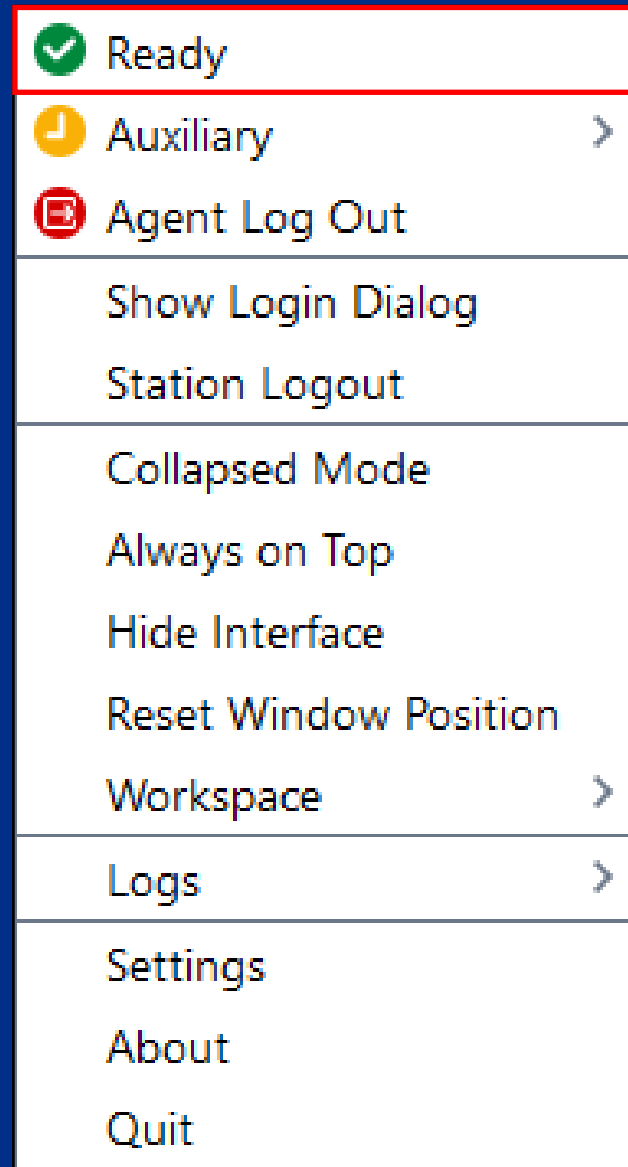


# Change Agent States

Click on the System Menu to expand the menu

Here you can manage your agent states by selecting the desired state, like READY, AUXILIARY, or even LOG OUT

Let's click READY and see how it reflects on the main interface.



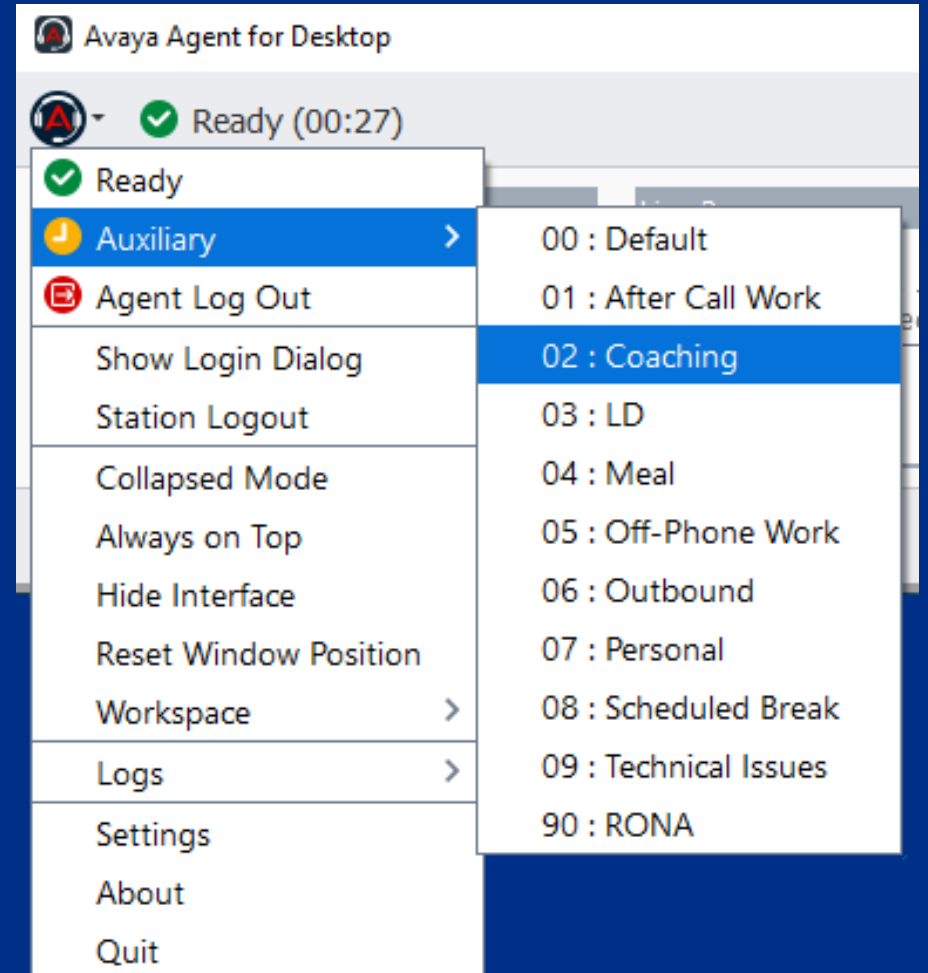
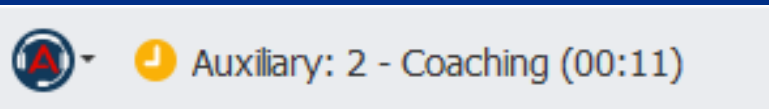


# Change Agent State

Before we move back to Auxiliary State, you can see that the Ready state also provides a timer indicating how long you've been in that state.







Click on Auxiliary state and choose coaching.

You will see your agent state change to:



# Agent States

The agent status icons are on the left corner of the top bar with the corresponding agent status. You can change the agent status either from the top bar or by right-clicking on the Avaya Agent for Desktop tray icon. The top bar displays the name of the agent or the extension number with the corresponding system status.

Icon	Agent state
	Offline
	Offline
	Ready (not on a call)
	Ready (on a call)
	ACW
Blinking icon between after call work icon and on-a-call icon	ACW pending
Blinking icon between aux icon and on-a-call icon	AUX pending
	AUX



# Using Auxiliary Reason Codes

Using Avaya Agent for Desktop, you can change the agent availability status and specify the appropriate reason code. Reason codes represent the reason for not being at the workstation, call work related actions during an active call, or for not accepting the ACD call.

	Aux Code	Description
1	After Call Work	Extended ACW needed for documentation
2	Coaching	Tracks time devoted to coaching for both agents and coach, e.g., supervisor, lead, manager
3	L&D	Learning and development, training
4	Meal	Scheduled lunch/dinner break
5	Off-Phone Work	Assigned work taking agent off the phone, e.g., project, meeting
6	Outbound	Triggers ACD to make unavailable for inbound call
7	Personal	Unscheduled time/break
8	Scheduled Break	Scheduled 15-minute break
9	Technical Issue	Technical issue that prevents agent from receiving/making calls



# Softphone Headset

- Using a headset connected to the PC, you control calls with a click of the mouse pointer, from the PC keyboard, or from the headset's touch controller.



# Softphone Headset

## Features:

- Rotating microphone boom arm that can be worn on the left or right side
- Adjustable headband and microphone that provides a customized fit.
- High resolution audio.
- Smart release connector.



- 1– Headband
- 2– Speaker
- 3– Microphone
- 4– Smart release

# Softphone Headset Touch Controller

Callout	Description
1	Volume key to increase the volume
2	Volume key to decrease the volume
3	Mute key to mute/unmute the microphone. When you mute an active call, the touchpad will glow red. When the call is unmuted, the touchpad will glow green.

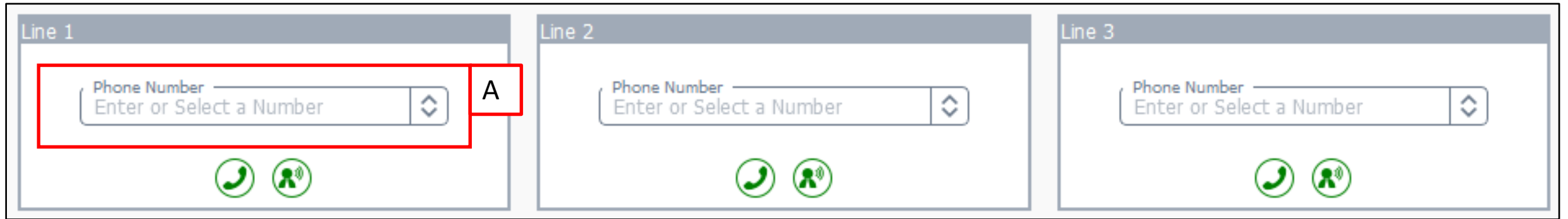


# AAfD Top Bar



- A. Application Name –The name of the application. This field always displays Avaya Agent for Desktop .
- B. Agent State – Displays the agent state with reason code name and the state timer.
- C. Station ID & Agent Extension # – Displays the station number and agent extension that you use for logging in to Avaya Agent for Desktop.

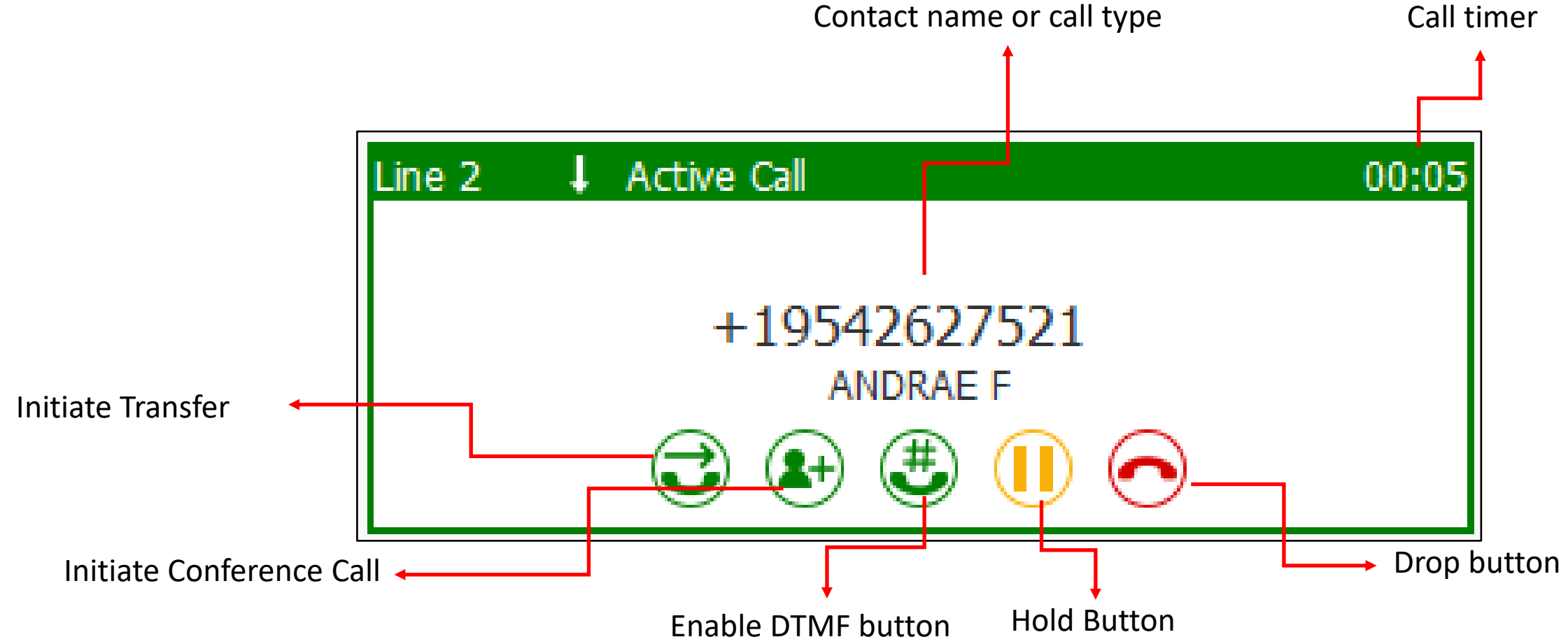
# AAfD Action Bar



- A. Call Text Box – The text box where an agent may type the destination number to make a new call, a transfer or a conference call. An agent may call a contact in the list by clicking the scroll icon located next to the call text box and selecting the contact in the list.



# Active Call Cell

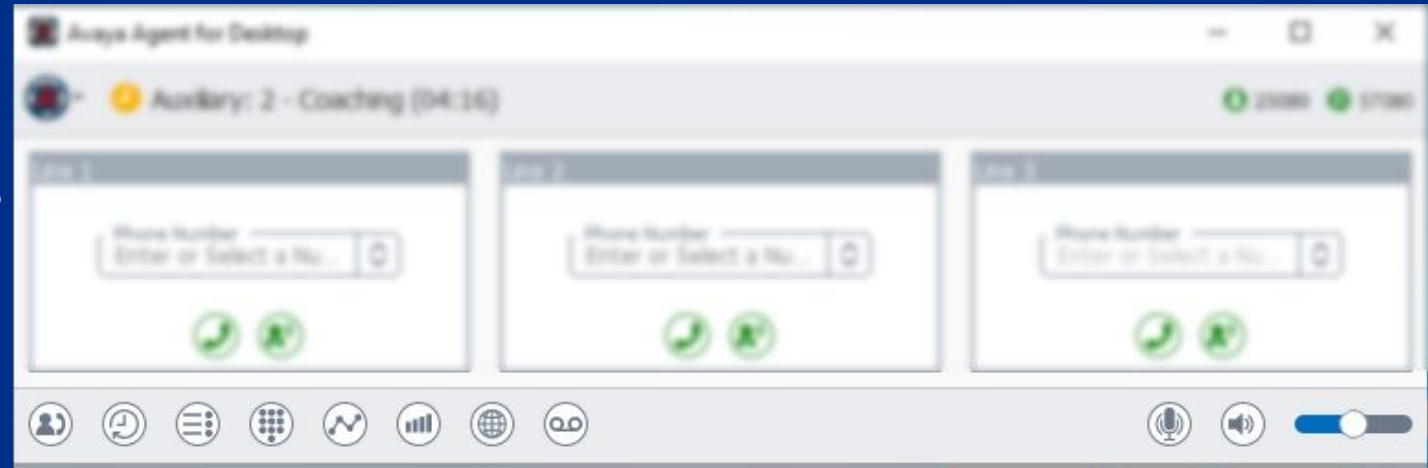


# Button Widgets

The Button Widgets are located on the left side of the bar. These include contacts, history, dial pad, stats console, quality details and browser.

Volume controls are located on the right side of the bar. These include mute and output volume controls.

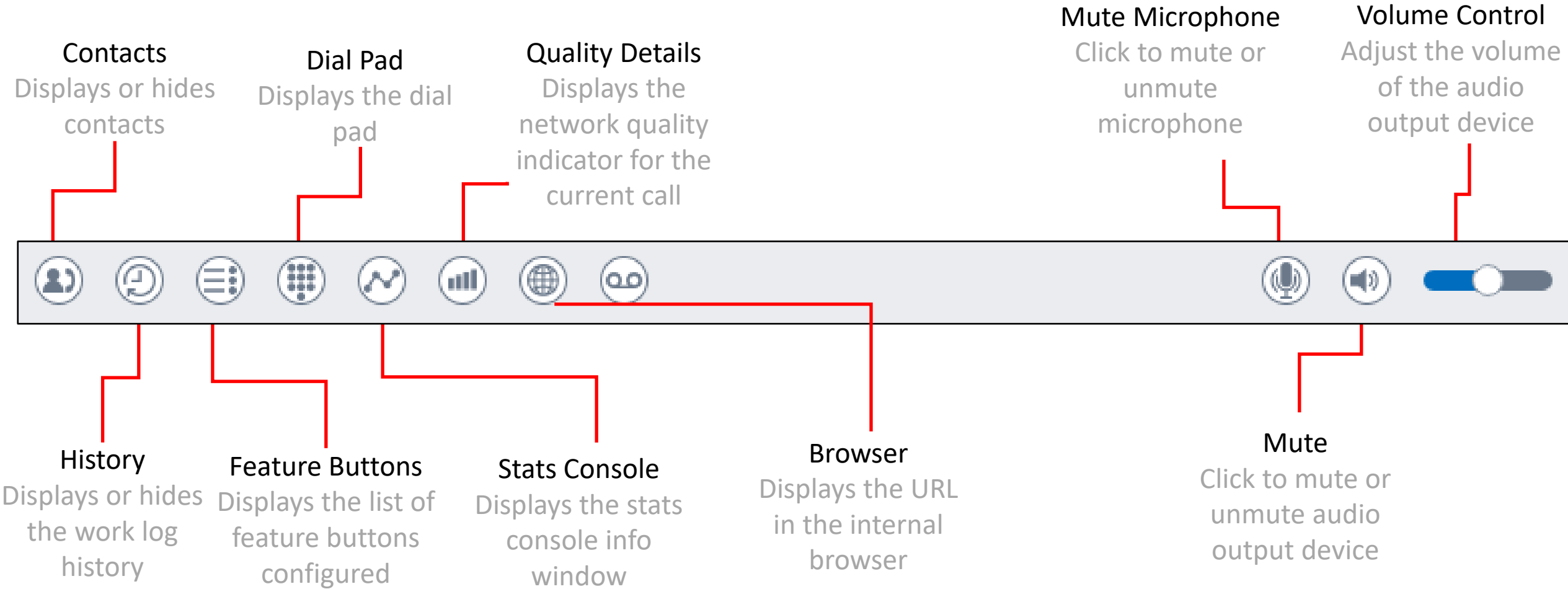
Let's review together.



Button Widgets

Volume/Audio

# AAfD Button Widgets



# Poll Questions #1







# Lesson 2: Inbound Voice Call Management

- Avaya Agent for Desktop works using a softphone that you can use to handle calls in the same manner as a desk phone.
- This lesson contains the procedures to handle calls using Avaya Agent for Desktop for different settings and includes information about:
  - Answering a call
  - Putting a call on hold
  - Ending a call
  - Making a call




# Answering a Call

- To answer an incoming call, click the **Answer** button in the ringing call cell. 
- To put an active call on hold, click the **Hold** button in the active call cell. 
- The **Hold** button changes to **Resume** when the call is on hold. Click the **Resume** button to resume the call. 
- To end a call, click the **Drop** button in the active call cell. 




# Making Direct Call Transfers (Cold Transfer)

Direct transfer is a cold transfer and should be avoided. Transfer an active call to a contact in the contact center without announcing the transfer as follows:

- In an active call, click the **Initiate Transfer** icon. The system displays the Transfer Destination field. 
- Click the drop-down list next to the **Phone number** field and select the contact from the list. The extension can also be typed into the field.
- Click **Confirm Transfer**.
- To successfully transfer the call, Click **Complete Transfer** after the 2<sup>nd</sup> party picks up.

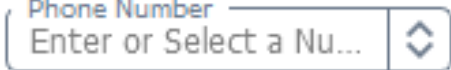

# Making a Conference Transfer (Warm Transfer)

Avaya Agent for Desktop provides you with the possibility of creating conferences when you have an active call, as follows:

1. Direct conference: to add the participants to the conference call without speaking to the participants
  2. Consultative conference: to speak to the participants before adding the participants to the conference call
- In an active call, click the **Initiate Conference** icon. 
  - Select a contact from the **Phone Number** drop-down list or type the extension into the field .
  - Click **Confirm Conference**.
  - The system adds the number you selected to the conference. Click **Complete Conference** to successfully conference the call.




# Lesson 3: Making a Call from the Text Input Field

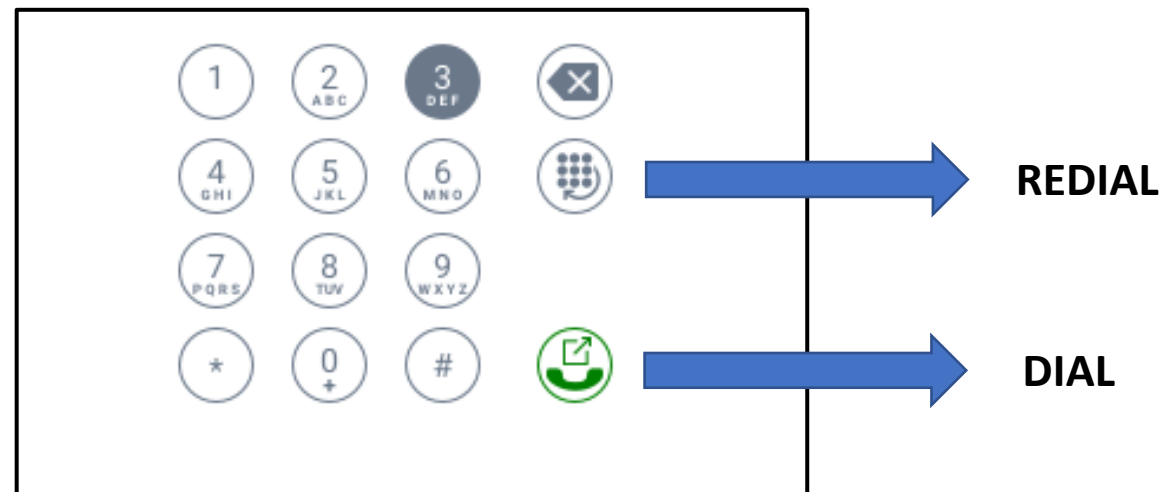
- Avaya Agent for Desktop provides you with the possibility of making calls in different ways.
- To make a call using the text input field located on the action bar, perform the following actions:
- Type the destination number in the **Phone Number** field. The image shows a text input field with the placeholder text "Phone Number" and "Enter or Select a Nu...". To the right of the input field is a small square button with a double-headed arrow icon.
- Press **Enter**.
- You can also click the **Initiate Call** icon located on the bottom of the text input field after you type the destination number. The image shows a green circular icon with a white telephone handset inside, representing the "Initiate Call" function.

# Making a Call from the Dial Pad


- The dial pad is an alternative to using the keyboard for entering phone numbers in the text input field.

## Procedure

1. In the bottom bar widget, click the **Dial Pad** icon. 
2. Click the dial pad buttons to form the number in the text input box.
3. (Optional) Click **Redial** to dial the last called number.
4. Click **Dial**.



# Making a Call from the Contact List

- Avaya Agent for Desktop provides you with the possibility of making calls in different ways.
- To make a call using the Contact List, perform the following actions:
- In the bottom bar widget, click the **Contacts** icon. The system displays the Contacts widget window. A circular icon containing a silhouette of a person's head and shoulders, representing a contact or user profile.
- Click the number next to the desired contact in the list to initiate the call.

# Poll Questions #2



# Inbound Call Interaction

- Log in, initiate call, demonstrate answer, hold/unhold, transfer



# Make an Outbound Call

- Show how to make an outbound call



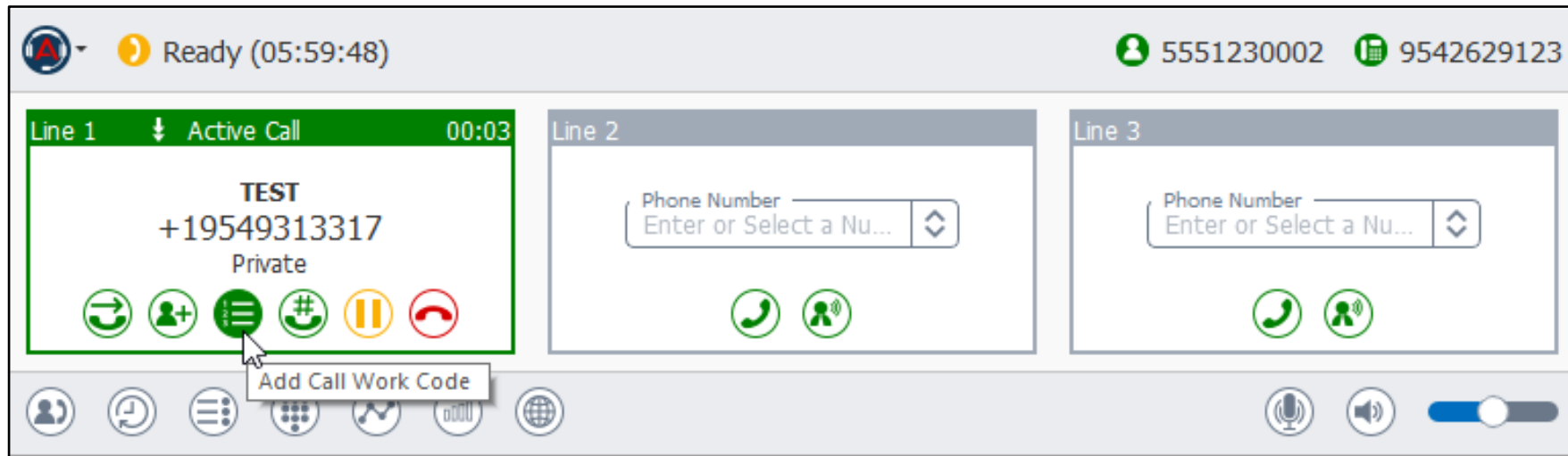
# Conference Another Party

- Show how to conference in a 3<sup>rd</sup> party



# How to Disposition a Call

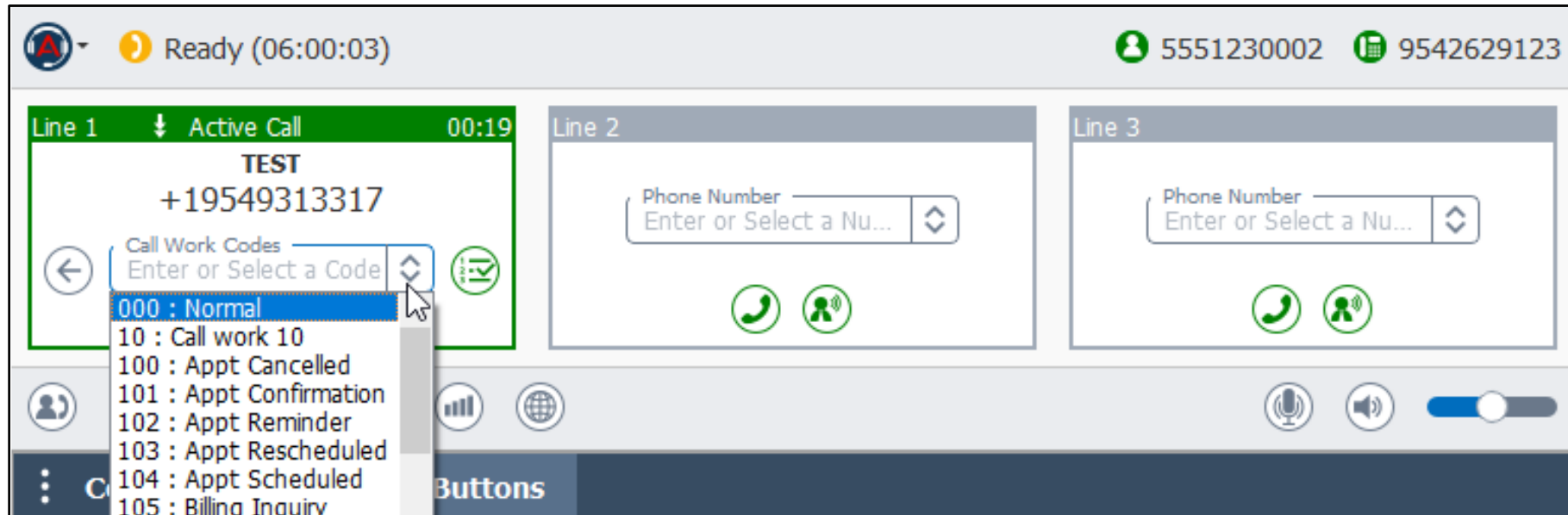
- When on an active call click this button





# How to Disposition a Call

- After selecting the Add Work Code button.
- Select the appropriate code.



# Using Disposition Codes

Disposition Code	Description	Wrap Up Category = FCR
Appt Cancelled	Cancelled and not rescheduled	N
Appt Confirmation	Confirmed details of appointment	Y
Appt Reminder	Manual appointment reminder call activities	Y
Appt Rescheduled	Rescheduled an existing appointment	Y
Appt Scheduled	Scheduled a new appointment	Y
Billing Inquiry	Patient/physician billing inquiry	N
Clinical Inquiry	Patient to provider/physician to physician	N
Complaint	Dissatisfied patient/physician	N



# Using Disposition Codes Cont'd

Disposition Code	Description	Wrap Up Category = FCR
General Inquiry	Miscellaneous inquiry	N
Insurance inquiry	Benefits/denial/pre-cert, referral-patient, physician or payor	N
Misdirected call	Wrong number; blind transfer	N
Other	Unable to disposition/ caller hangs up	N
Personal Call	Non-work related	N
Registration Update	Update demographic/Insurance	Y
Unable to Sch. Appt	Appointment needed but not available	N



# Disposition the Call

- Show how to disposition the call



# Put an Outbound Call On Hold

- Show how to put an inbound call on call



# Adding a contact

Agents are able to add a contact to their personal contact list.

**NOTE:** It is recommended that only business appropriate contacts are added to this list and to refrain from removing any of the default contacts.

- To add a contact, **Click** the Contacts button.

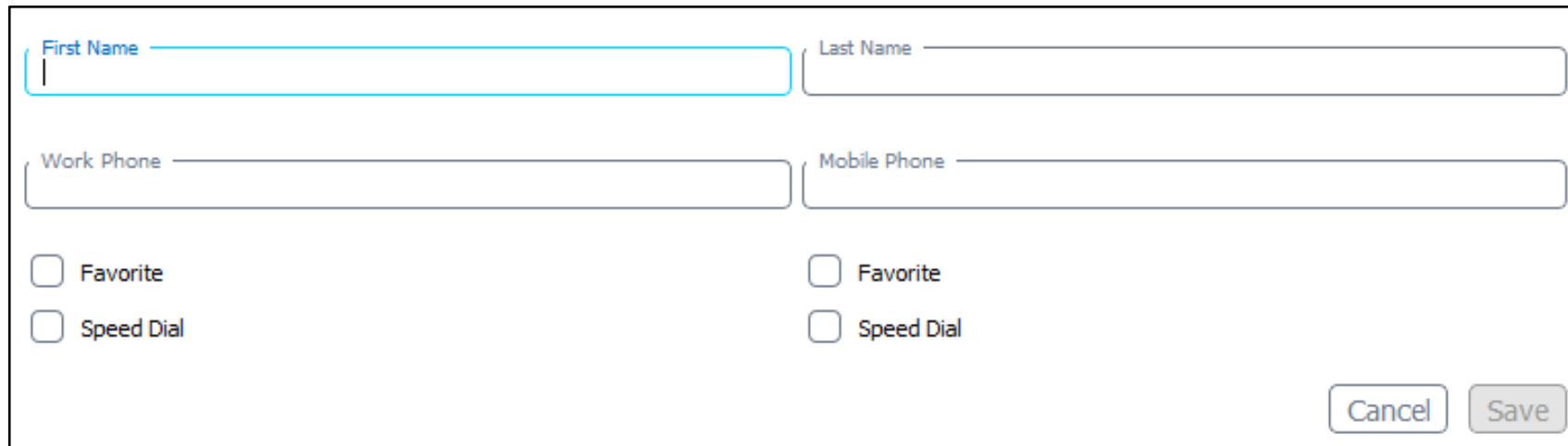


- Click the plus symbol at the bottom left of the application.



# Adding a contact

- Enter the contact information. Also, agents can tag these contacts as favorites or speed dial.



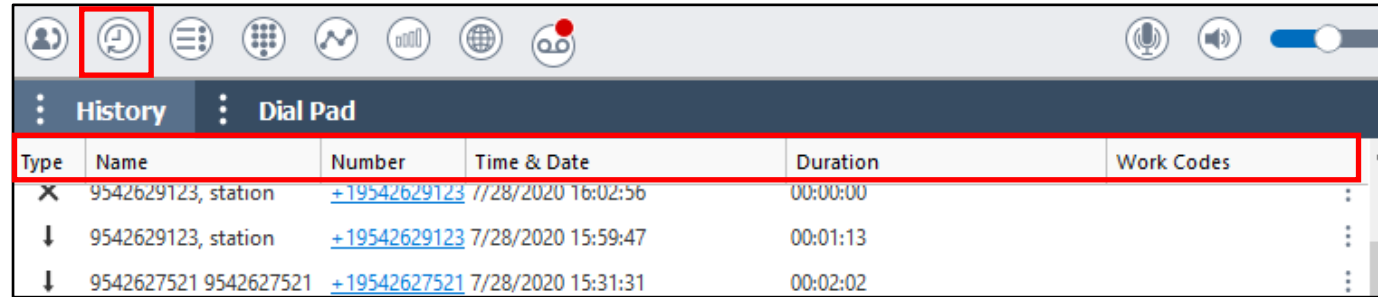
The screenshot shows a contact form with the following elements:

- First Name**: A text input field with a blue border and a cursor at the start.
- Last Name**: A text input field.
- Work Phone**: A text input field.
- Mobile Phone**: A text input field.
- Favorite**: Two checkboxes, one for each phone field.
- Speed Dial**: Two checkboxes, one for each phone field.
- Buttons**: "Cancel" and "Save" buttons at the bottom right.

It is recommended not to tag too many numbers as a speed dial, as this would make it inconvenient and defeat the purpose of creating the list.

# Viewing the Call History

In the bottom bar widget, click the **History** icon. The system displays the History widget window.



The screenshot shows a mobile application interface with a bottom bar widget. The 'History' icon is highlighted with a red box. Below the bar, the 'History' widget is displayed, showing a table of call history entries. The table has columns for Type, Name, Number, Time & Date, Duration, and Work Codes. The first row is highlighted with a red box.

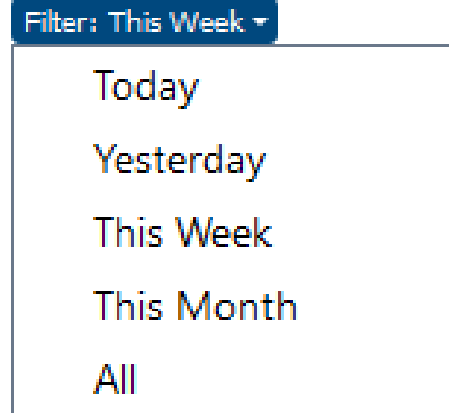
Type	Name	Number	Time & Date	Duration	Work Codes
X	9542629123, station	<a href="#">+19542629123</a>	7/28/2020 16:02:56	00:00:00	
↓	9542629123, station	<a href="#">+19542629123</a>	7/28/2020 15:59:47	00:01:13	
↓	9542627521 9542627521	<a href="#">+19542627521</a>	7/28/2020 15:31:31	00:02:02	

- To sort the call history entries in ascending or descending order, click the table header that corresponds to the sorting criterion.
- For example, to sort the entries in the Calls History table by the name of the contacts, click the **Name** header. Click the table header once to sort the entries in ascending order. Click the table header twice to sort the entries in descending order.

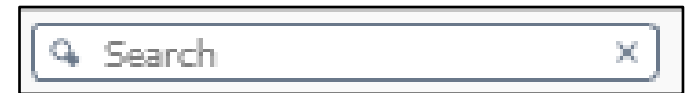


# Viewing the Call History Cont'd

- To display the call history entries from a relative time period, Click the **drop down** in the bottom right of AAFD tool.



- To search for an entry, type the name or the phone number of the contact in the **Search** field at the bottom left of the window.



# Making a Call from the Call History Window

In the bottom bar widget, click the **History** icon. The system displays the History widget window.

- In the History window widget, click the phone number of the desired contact.
- The application initiates a call with the clicked contact number.

⋮ Contacts ⋮ History ⋮ Feature Buttons ⋮ Dial Pad ⋮ Stats Console ⋮ Quality Details						
Type	Name	Number	Time & Date	Duration	Work Codes	
↑	9542629198 9542629198	<a href="#">9542629198</a>	7/29/2020 09:12:46	00:00:21		⋮
↑	9542629198 9542629198	<a href="#">9542629198</a>	7/29/2020 09:12:34	00:00:00		⋮
↑	9542629198 9542629198	<a href="#">9542629198</a>	7/29/2020 09:12:10	00:00:16		⋮

# Make a Call from the History Window



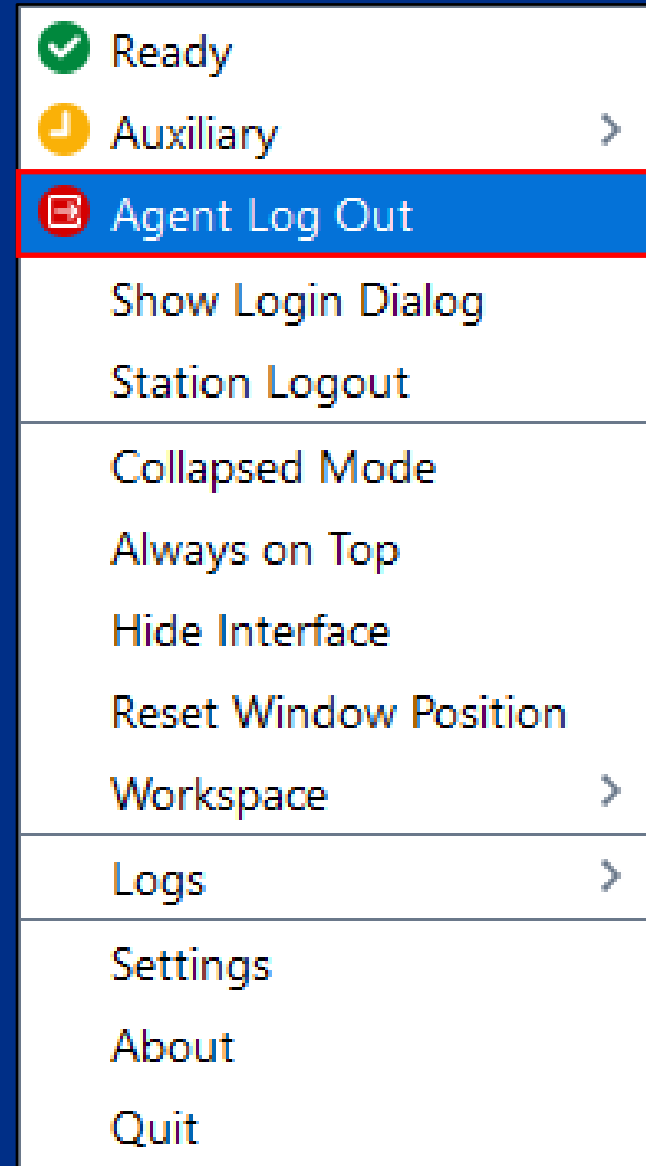
# Quizizz Game



# Sign Off

To Sign Off, open the System Menu and click on Agent Logout.

After you confirm, the log in screen will appear. Sign out of the Agent login first and then the Station. Once confirmed you can close the log out screen.

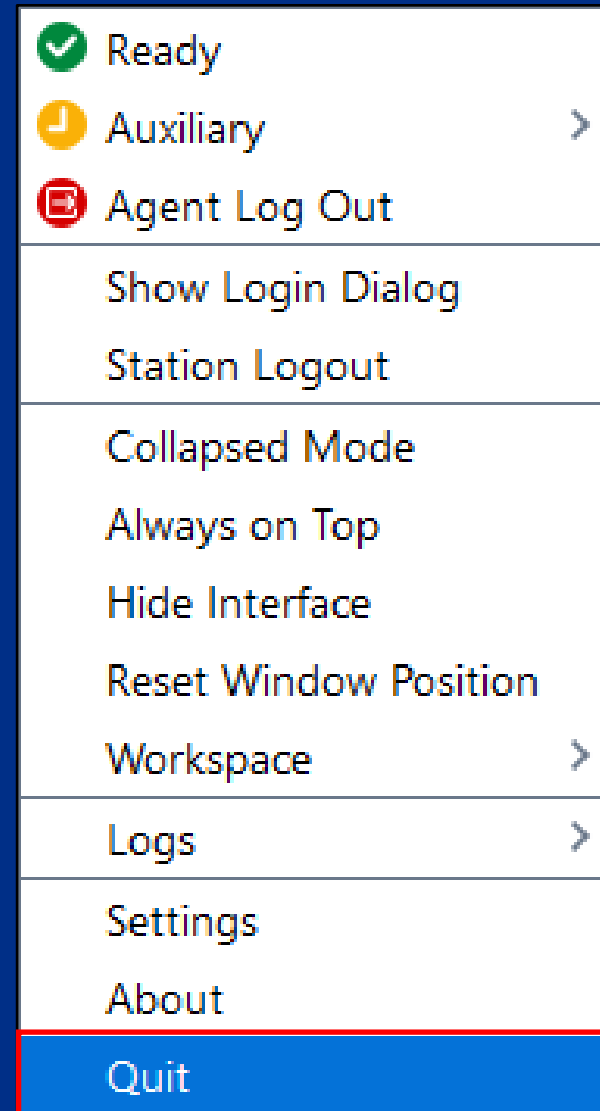


# Logout

To quit the application, go back to the system menu again, and select Quit.

Once the system confirms, the system is closed.

Note:



# Summary

Avaya Agent for Desktop is an amazing tool for our agents. It enhances the agent's overall:

- Flexibility
- Reliability
- Efficiency



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