

Call handling

This reference card addresses the most common procedures for taking calls. Your contact center may be configured to use different procedures.

Answering calls*

- To answer a call:
 - If Auto-Answer is in effect, wait for the confirmation tone.
 - If Auto-Answer is not in effect, select the **Answer** button to connect the call.
- If an agent greetings is in use, wait for it to finish playing.
- Speak into the headset, microphone, or handset.
- If you are using Manual-In Mode, select **Agent > Manual-In Mode** when you complete the call to become available for more calls.

Transferring calls

- Select **Call > Transfer** from the menu bar.
- Select **Basic Transfer**, **Unsupervised Transfer**, or **Enhanced Transfer**. You may also click the **Transfer** button for Enhanced Transfer.
- Enter the number to which you want to transfer the call.
- Complete the transfer by performing the following step for the selected transfer:
 - Basic – Select **Call > Transfer > Basic Transfer** again.
 - Unsupervised – Select the **OK** button in the **Unsupervised Transfer** dialog box.
 - Enhanced – After the called party answers, select the **OK** button in the **Enhanced Transfer** dialog box.

Making calls*

Dial the number using one of the following methods:

Senderized dialing—Allows you to edit the number before it is sent.

- Perform one of the following actions:
 - Enter the number in the **Number** field or on the IP Agent **DialPad**.



- Select the number from your Speed Dial list, Call History, Phone Directory, or Public Directory.
- Press the **Enter** key or click the **Dial Number** button.

Cut-through dialing—Transmits digits immediately, no editing.

- Obtain a dial tone by pressing the **Enter** key (with the main window active) or by clicking the **Dial Number** button.
- Enter the number using the PC keyboard or the IP Agent **DialPad**.

Holding and reconnecting

To place a call on hold, click the **Hold** button.

Note: Current calls are automatically placed on hold when you answer another call.

To return to a call on hold, select the **Reconnect** button for that call.

Releasing and dropping calls

Release—The current call is disconnected and you do not hear dial tone.

To release a call, perform one of the following actions:

- Select the **Release** button.
- Hang up the handset, if used.

Note: For calls on hold, you must reconnect to the call before you can release it.

Drop—The current call is disconnected and you hear a dial tone.

To drop a call, click the **Drop** button.

Conferencing callers

- Select **Call > Conference** from the menu bar or click the **Conference** button.
- Select **Basic Conference** or **Enhanced Conference**.
- Enter the number of the party to add.
- For Enhanced conferencing, select **OK** in the **Enhanced Conference Number** dialog box.
- Add the party to the call by selecting the following step for the selected conference type:
 - Basic – Select **Call > Conference > Basic Conference** again.
 - Enhanced – Select **OK** in the **Add Party** dialog box.
- Repeat the steps until you have added all the parties to the call.

Accessing Avaya IP Agent features

- Transfer 
- Conference 
- Drop 
- Hold 
- Dial Number 
- Phone Directory 
- Speed Dialing (arrow) 
- Call History 
- Recent Call List (arrow) 
- Search Public Directory 
- Screen Pops – **Tools** menu
- VuStats – **Tools** menu

Keyboard shortcuts

Agent login:	Ctrl + Insert
Agent logout:	Ctrl + Delete
ACW state:	Ctrl + W
AUX state:	Ctrl + A
Auto-In state:	Ctrl + I
Manual-In state:	Ctrl + M
Hold:	Ctrl + H
Transfer:	Ctrl + T
Conference:	Ctrl + F
Call History:	Alt + H
Phone Directory:	Alt + D
Cut selection:	Ctrl + X
Copy selection:	Ctrl + C
Paste selection:	Ctrl + V
Alternate between programs:	Alt + Tab
Request Supervisor:	Ctrl + S
Exit IP Agent:	Alt + F4

* To make or receive calls, you must register through Avaya IP Agent with the Avaya call-processing system and log in to the appropriate splits or skills (see reverse).

Basic administration and help

Registering with the Avaya call-processing system

Note: Station registration is not required for CALLMASTER® VI configurations.

1. Select **File > DEFINITY Login** to display the **DEFINITY® Login** dialog box.
2. Enter or change the settings for your extension, password, server address, telephone extension, or bandwidth as needed. For version 3, select the **Settings** button to change bandwidth settings..
3. Select the **Login** button.

Note: To use the auto-login feature, select the **Automatically login if possible when application restarts** check box.

Logging in to IP Agent – EAS** (Ctrl + Insert)

1. Click the **Login** button on the Agent toolbar or select **Agent > Agent Login** from the menu bar.
2. Enter your agent number and password in the **Agent Login** dialog box.
3. Select the **OK** button. (If you have a voice phone, it rings.)
4. Answer the voice phone immediately.
5. If you do not answer the voice phone or if you used a wrong number, log in again.
6. Begin answering or making calls.

Logging out of IP Agent (Ctrl + Delete)

1. Click the **Logout** button on the Agent toolbar or select **Agent > Agent Logout** from the menu bar.
2. Enter a reason code, if required.

Logging in to IP Agent – non-EAS** (Ctrl + Insert)

1. Select **View > Toolbars > Agent** from the menu bar to display the Agent toolbar.
2. On the Agent toolbar, select a split for which you want to log in as a member.
3. Select the **Login** option to display the **Agent Login** dialog box.
4. Enter the split password, if required.
Note: If the split has only one or two digits, you may need to enter one or more leading zeros.
5. Select the **OK** button on the **Agent Login** dialog box.
6. Select the split from the Agent toolbar again. Then, select the appropriate work state from the resulting menu.
7. Repeat steps 2-6 for each split. (Maximum: 4 splits)

Administering agent greetings*

1. Select **Tools > Agent Greetings**.
2. Highlight an agent greeting in the list.
3. Administer the greeting by using the following actions:
 - Enable – Place a check mark next to the greeting.
 - Delete – Click the **Delete** button. 
 - Record – Use the buttons on the dialog to record, play, and stop greetings.
 - Setup – Click the **Properties** button  to change the settings.

Greetings tips:

- You can select and play greetings directly from the **Agent Greetings** toolbar in the main window.
- Use an inactive agent mode to record greetings and prevent being interrupted by calls.
- If you have multiple active greetings, verify that the settings do not conflict or multiple greetings may play simultaneously.

Getting help (F1)

- Move the cursor over the icons and other interface elements to display tool tips.
- Press **F1** or select **Help > Contents** to display the IP Agent online help.
- See *Avaya™ IP Agent Installation and User Guide* for procedures and detailed information.
- Click the **Supervisor** button  to request assistance from your supervisor. (This feature requires administration on the Avaya call-processing system.)

Changing agent state

Manual-In

- Ctrl + M
- **Manual-In** button (Agent toolbar)
- Agent > Manual-In (menu bar)

Auto-In

- Ctrl + I
- **Auto-In** button (Agent toolbar)
- Agent > Auto-In (menu bar)

After Call Work (ACW)

- Ctrl + W
- **After Call** button (Agent toolbar)
- Agent > After Call Work (menu bar)

Auxiliary Work (AUX)

- Ctrl + A
- **Aux Work** button (Agent toolbar)
- Agent > Auxiliary Work Mode (menu bar)

* Agent greetings are not available in the Telecommuter configuration.

** EAS or non-EAS login is based on the **Configure program for EAS agent support** check box in **Program Options**.