

# 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 greeting 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 to use the currently configured transfer mode.
- Enter the number to which you want to transfer the call. If you are using Unsupervised or Enhanced transfer, select the **OK** button after entering the number.
- Complete the transfer by performing the following step for the selected transfer:
  - Basic – Select **Call >Transfer > Basic Transfer** again.
  - Unsupervised – The transfer is completed without further interaction.
  - 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.
  - Select the number from your Speed Dial list, Contact History, Phone Directory, or Search Public Directory window.
- 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 Avaya 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 **Enhanced Conference-Add Party** dialog box.
- Repeat these steps until you have added all the parties to the call.

## Sending instant messages

- Double-click an available instant messaging contact in the **Contacts** window.
- Enter your message in the text box located in the lower section of the **Instant Message Session** window and select the **Send** button.
- Watch for responses in the upper section of the window and enter your responses in the lower text box.
- When you are finished, click the X button in the right-hand corner of the window.

## Changing your instant message presence

- From the IP Agent main window, select **Instant Messaging > My Presence Status**.
- From the resulting menu, select the appropriate presence state that reflects your availability:
  - Online
  - Busy
  - Away
  - On the Phone
  - Appear Offline

\* To make or receive calls as an agent, you must register through Avaya IP Agent with the Avaya communication server and log in to the appropriate splits or skills (see reverse).

## Basic usage and help

### Registering with the Avaya communication server

**Note:** Station registration is not required for the Callmaster VI configuration.

1. Select **File > Station Login** to display the **Login** dialog box.
2. Enter or change the settings for your extension, password, configuration, server address, telephone extension, IP telephone address, bandwidth, and dialing location as needed. If you need to change any of the default settings, select the **Settings** button.  
**Note:** If you want to log in to your Converged Communication Server for the Instant Messaging feature, place a check mark in the **Log into Avaya instant messaging server** check box.
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 **Login** button. (If you have a voice phone, it rings.)
4. Answer the voice phone immediately.  
**Note:** If you do not answer the voice phone or if you used a wrong number, log in again.
5. 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 **Login** 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 Avaya IP Agent online help.
- See *Avaya IP Agent Installation and User Guide* for procedures and detailed information.
- Click the **Assist** button  to request assistance from your supervisor. (This feature requires administration on the Avaya communication server.)

### Changing agent state

#### Manual-In

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

#### Auto-In

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

\* To use greetings in the Telecommuter and Avaya Telephone configurations, you must use the Avaya Switcher II headset.

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