jacada

WorkSpace

User Guide

Version 7.3

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1 Overview

Jacada WorkSpace Agent Desktop™ is a customer driven unified desktop solution for call centers. WorkSpace provides an easy to use customer service experience by streamlining agent interactions with a large number of systems. Using WorkSpace, agents can access back-end data sources as well as frequently used applications.

WorkSpace Agent Desktop™ offers:

- Multi context – Agents are able to simultaneously manage multiple customers across multiple EMC channels from a unified desktop reflecting a single view of the customer and the channel in use for each and every call.
- Multi channel – Unifies EMC channels (Voice, Email, Chat) onto a single, convenient desktop for an improved and competitive agent experience, and efficient handling of multiple customers from multiple channels at the same time.
- Thin client – A web-based, high performance user interface, that does not require any installation and is cost effective to maintain.

This document is intended for Jacada WorkSpace supervisors and agents. It provides detailed information on how to manage call center activities from the agent's desktop. For instructions, refer to the following topics:

Section Title	Description
Getting Started	Describes how to start WorkSpace, login and logout, and manage your agent status.
WorkSpace Desktop Environment	Describes the WorkSpace user interface and different views.
Performing General Tasks	Describes how to use common WorkSpace features that extend beyond client interactions.

Managing Voice Conversations	Describes how to manage incoming calls, make and transfer calls, and make conference calls.
Managing Email Conversations	Describes how to manage incoming email and reply to, forward, and send emails. Includes details about using text templates.
Managing Chat Conversations	Describes how to manage incoming chat messages, and reply using canned responses or free text.

2 Getting Started

Jacada WorkSpace Agent Desktop™ provides support for handling voice, chat, email, and documents all within a single desktop environment.

The following topics describe how to launch WorkSpace and be ready to accept work items:

- Launching Jacada WorkSpace
- Managing your Agent Status
- Logging Out

Launching Jacada Workspace

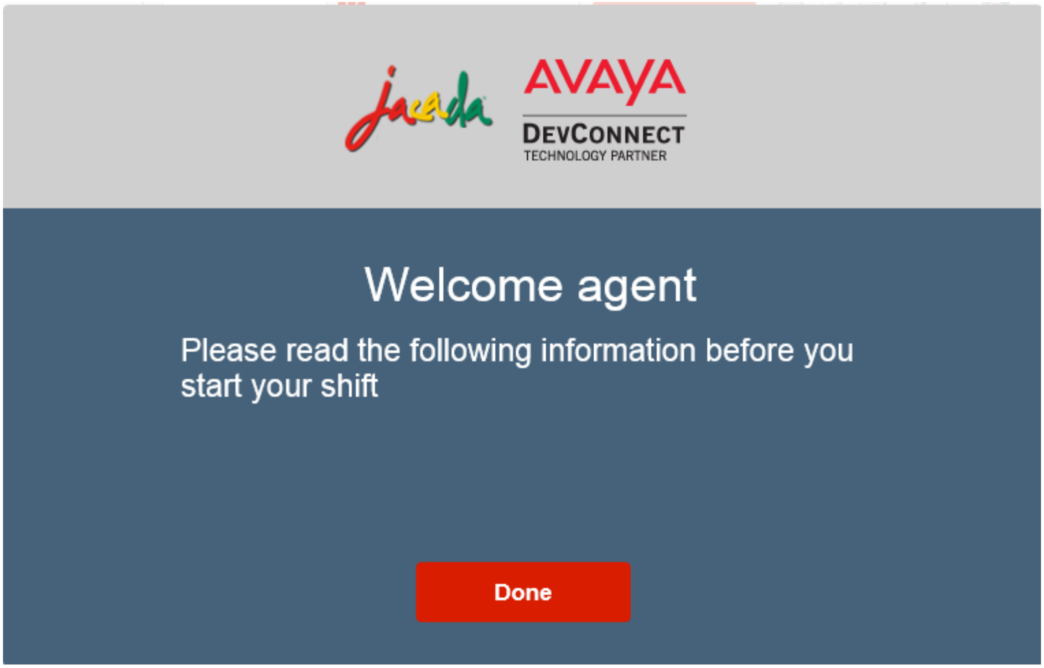
Jacada WorkSpace is a web-based program which you open using an internet browser. WorkSpace currently supports Internet Explorer versions 8 and 9.

To open WorkSpace:

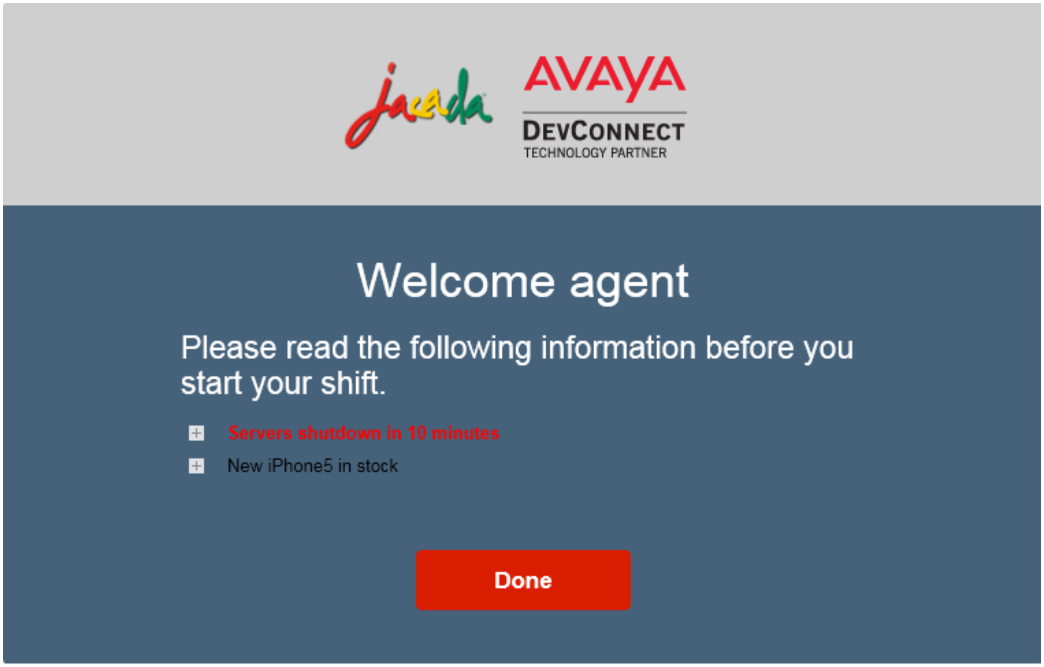
1. From the *Start* menu or task bar, open Internet Explorer.
2. In the address bar, enter the URL for Jacada WorkSpace.
   The *Login* screen appears.

3. Enter your agent **User name** and your **Password** in the appropriate fields.

4. Click *Login*.
   The Welcome screen appears.



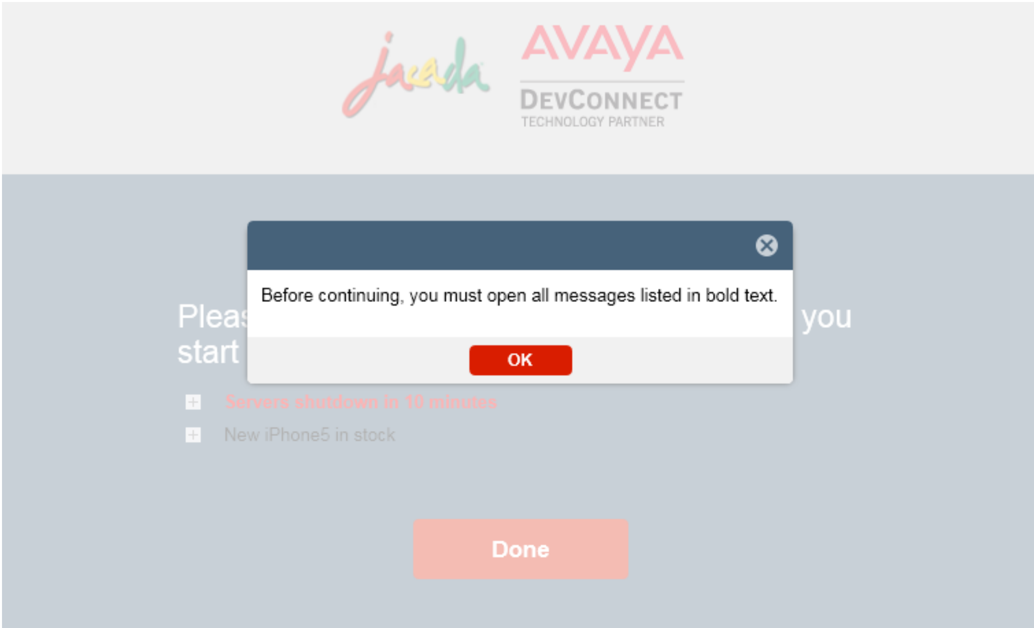
If you have messages, they will appear in the welcome screen.



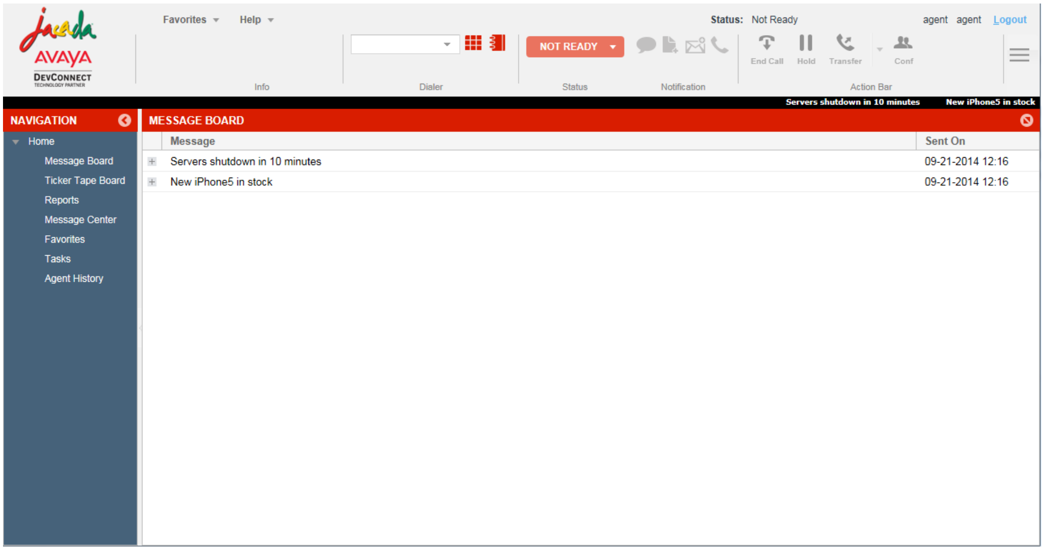
If a message appears in red, you must open the message before launching WorkSpace.

- Click the plus sign to view the message contents.

If you click *Done* without checking messages, the following message appears:



5. Once you have checked any required messages, click *Done*.
   Jacada WorkSpace opens in the default *Message Board* view. Your agent status is *Not Ready*. In order to accept conversations, you must change your status. Refer to Managing your Agent Status.



Managing Your Agent Status

When you first log on to WorkSpace, your agent status is *Not Ready* and you cannot receive conversations. In order to receive calls, email, or chat messages, change your agent status to *Ready* on the toolbar.

Sometimes, you may want to perform call center tasks without receiving conversations. In this case, change your status back to *Not Ready*. You may continue to work without receiving any new calls, email, or chat.

Note: Your organization may create customized status options, such *Break*, *Restroom*, *Lunch*, *Meeting*, etc., as determined by your system administrator.

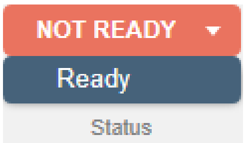
The agent status button and indicator appear on the toolbar, as described in the following table.

Toolbar Icon	Status	Description
	**Not Ready**	Agent is logged in but not available to receive conversations.

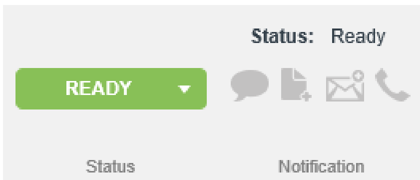
	**Ready**	Agent is logged in and available to receive conversations.

To activate your status:

- On the main toolbar, click *Not Ready* and select *Ready*.



Your agent status changes to *Ready* and you may receive incoming calls, email, or chat.



Agent Roles and Privileges

The system administrator determines which features are available to specific agents by defining the agent roles and allocating certain privileges. Therefore, some Jacada WorkSpace features are only available to you if they are included in your role and list of privileges. To confirm which features you can access, refer to your system administrator.

To begin managing conversations, refer to the relevant topics:

- Managing Voice Conversations
- Managing Email Conversations
- Managing Chat Conversations

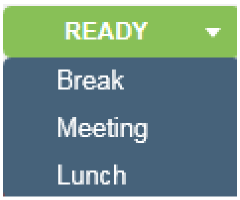
Changing Status

When you start your shift, log in and set your status to *Ready* to accept incoming conversations from customers. To temporarily become unavailable to receive conversations, change your status to *Not Ready*. In *Not Ready* mode, you can still communicate with internal personnel but may not accept incoming conversations from customers.

To change your status:

1. On the main toolbar, click *Ready*, and select *Busy*. Your status changes to *Not Ready* and you will not receive any outside conversations.

Your company may supply a list of different reasons for not being ready. In that case, you may select one of the customized options (e.g., *Break*, *Meeting*, *Lunch*, and so on).



2. To return to your shift after a break, click *Not Ready*, and select *Ready*.

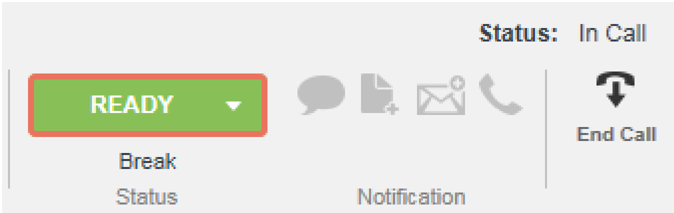
Changing Status During a Call

While on an active call, you can change your agent status so you do not receive further calls. Your new status takes effect only at the end of the current call.

To change status during a call:

- During your active call, click *Ready* on the toolbar, and select one of status options (e.g., *Not Ready*, *Break*, etc.).

  The *Ready* button appears with a red border and the future status appears below the button.



The new status takes effect after you end the call.

Logging Out

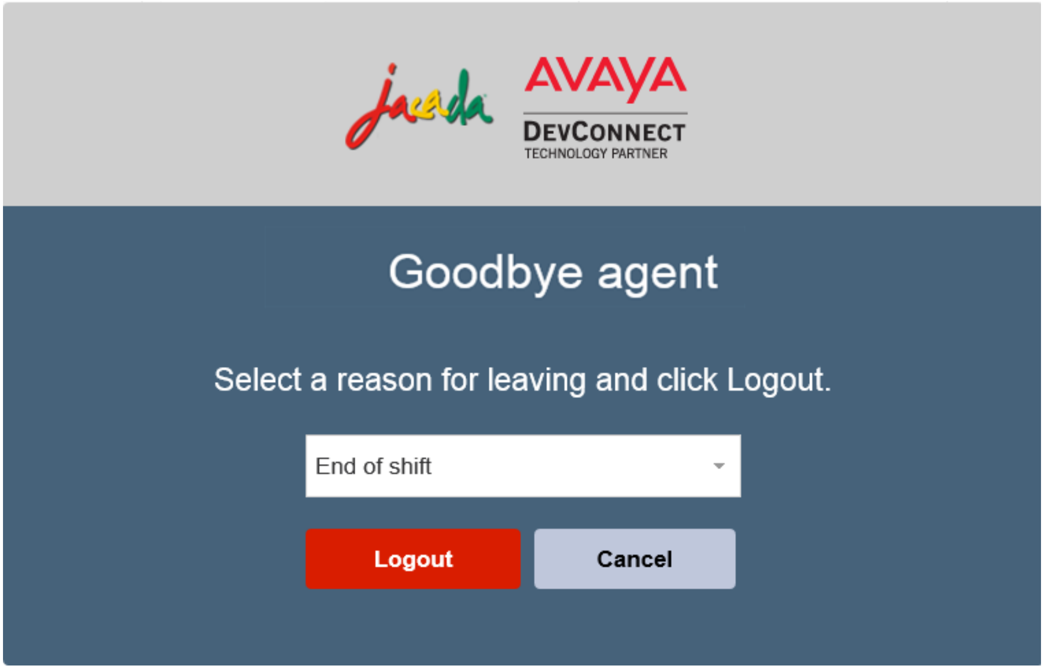
Logging out of WorkSpace ends your current session. Log out when your shift is over, or when you are taking a break and do not want to stay logged into WorkSpace. For example, log out if someone else will be using WorkSpace from your desktop while you are away.

To take a break without logging out, just change your agent status. See Managing your Agent Status.

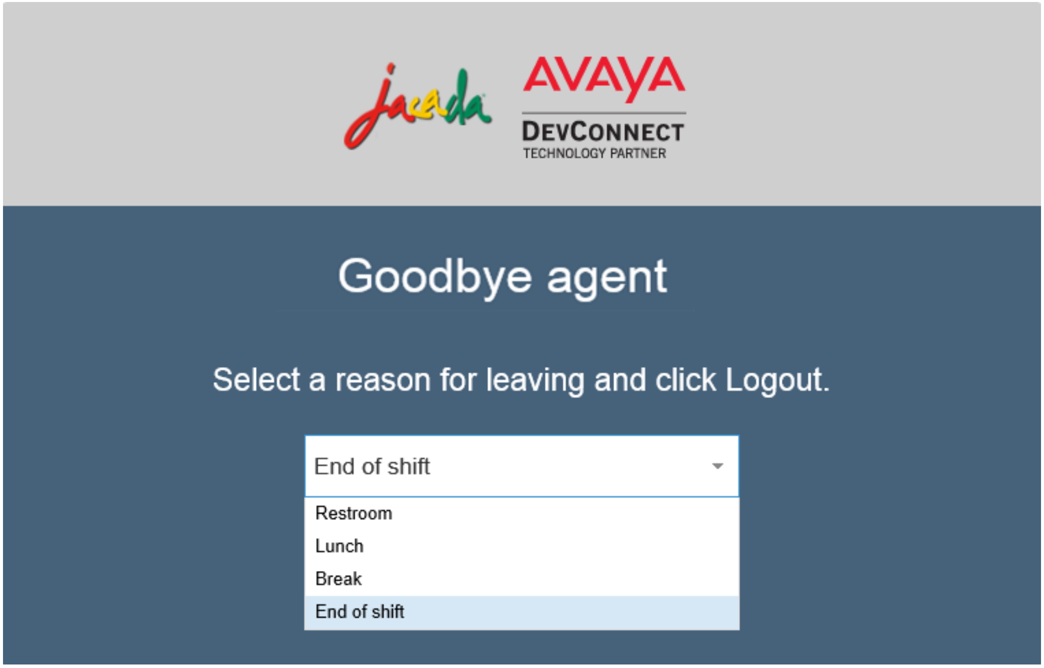
Note: You may not log out when you have an open live session, such as *Chat*, or when your agent status is *Ready*. First, complete your conversation, change your status to *Not Ready*, and then log out.

To log out:

1. On the toolbar, click *Logout*. The *Logout* screen appears.



2. Select a logout reason from the drop-down list (e.g., *End of Shift*, *Restroom*, *Lunch*, *Break*). These options are customizable by your organization.



3. Click *Logout*. Your session ends and WorkSpace closes.
   or,
   Click *Cancel* to return to WorkSpace.

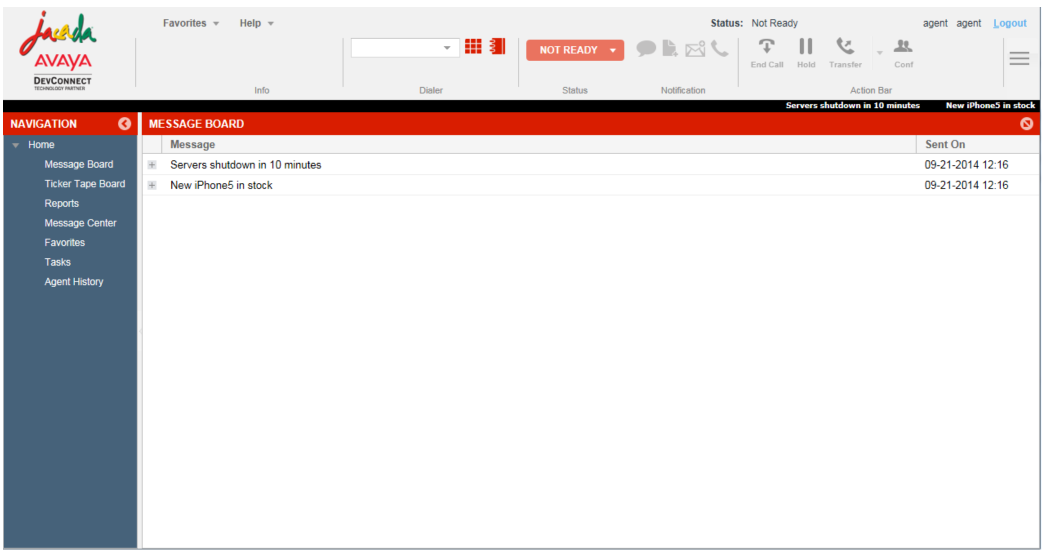
3

Workspace Desktop Environment

This section describes the user interface of WorkSpace. It includes instructions for customizing the interface and performing general tasks.

The WorkSpace environment displays a toolbar, menu bar, and areas of specialized content from various sources, called portlets, which appear as independent sections of your screen. Some of the portlets are visible at all times, while others are specific to the task being performed. Some portlets can be personalized according to the tasks you want to accomplish.

When you first open WorkSpace, the default screen displays the Message Board and any messages for the agent.



The WorkSpace environment includes the following components:

Component	Description
Menu Bar	Displays Favorites and Help menus above the toolbar.
Toolbar	Displays customer information, the dialer options, and status information.
Action Bar	Portion of the toolbar that displays specific icons for each conversation context (calls, email, chat).
Navigation Bar	Displays a list of common tasks and customized portlets.
Conversation Context	Displays the unique screen for managing Voice, Email or Chat conversations.
Disposition Notes and Codes	Displays an area in the conversation view for agents to summarize the conversation.
Customer Information	Displays updated contact information for the current customer.
Customer Conversation History	Displays a record of all conversations (Voice, Email, or Chat) from the current customer.
Customizing the Interface	Techniques for customizing how portlets and content appear on your screen.

Menu Bar

The WorkSpace Menu bar appears at the top of the screen and includes two menu items: Favorites and Help.

The menu bar may include additional items if they were configured in your environment.

- The *Favorites* menu displays a customized list of specific websites for quick access. For details, see Using Favorites.
- The *Help* menu displays WorkSpace information.
  - **Workspace Info** - Displays agent-specific environment information, such as server and browser information.
  - **About Jacada WorkSpace** - Displays the current WorkSpace version.

Toolbar

The toolbar that appears at the top of the Jacada WorkSpace screen is divided into sections. The toolbar contains status areas, buttons and menus to help you manage your work items and determine the status of conversations.

The toolbar appearance changes depending on the agent status and conversation status.

The following table describes the default Toolbar sections and icons.

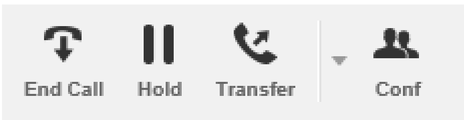
Toolbar Area	Icons	Description
Customer Info	Customer Name: larry Established: 09-14-2014 13:22 Info	Displays customer information for the active conversation: • Email - Displays customer email address and subject line • Voice - Displays customer phone number • Chat - Displays customer name and the current date and time
Dialer	Dialer	Options for searching the dial list and for dialing a number. **Contact Field** - Enter a phone number, or click the arrow to view a list of recent contacts.
		Dial Pad - Click to open the dial pad for manually entering a phone number.
		Dial List - Click to open the Dial List directory for searching names and phone numbers of internal contacts.
Agent Status	READY NOT READY	Indicates the agent status: • Not Ready - Agent is logged in but not available to accept incoming conversations • Ready - Agent is logged in and ready to accept incoming conversations For details, see Managing your Agent Status.
Conversation Status	Status: In Call	Displays the current status of the active call, email, or chat session.
New Item Notification		Icons indicate incoming conversations.

		New Chat - Flashes red
		New Email - Flashes red
		New Voice - Flashes red
Action Bar		Displays icons for performing specific actions according to the type of active conversation (chat, email, or voice).
Active Conversations		Indicates whether or not there are multiple active conversations, and if so, lists them.
		No Active Conversations
		Active Conversations - Click to view list of active conversations.
Agent Name		Displays the user name of the currently logged in agent.
Logout		Click *Logout* to exit the program. Logout is only available if you are **not** in an active conversation.

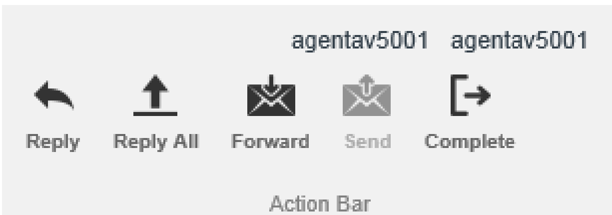
Action Bar

The Action bar is a section of the toolbar that displays specific icons for each conversation context (calls, email, and chat).

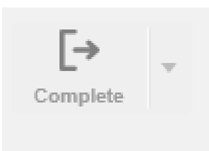
Voice Actions:



Email Actions:



Chat Actions:



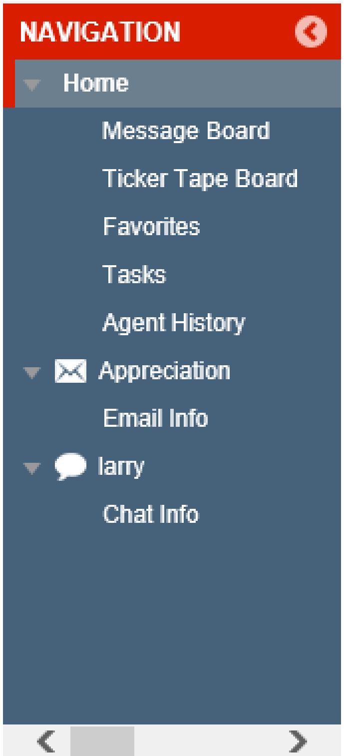
For details, refer to the following topics:

- Voice Toolbar
- Email Toolbar
- Chat Toolbar

Navigation Bar

The Navigation bar appears in a vertical column on left side of the page. Each item in the Navigation bar opens a different WorkSpace screen. Only one view can be open at a time.

To switch views, select a different item from the Navigation list.



The Navigation bar displays the Home node, with a list of tabs for different common tasks.

Feature	Description
Message Board	Lists any messages from your supervisor to your group.
Ticker Tape	Scrolls messages from your supervisor across the top of the screen.

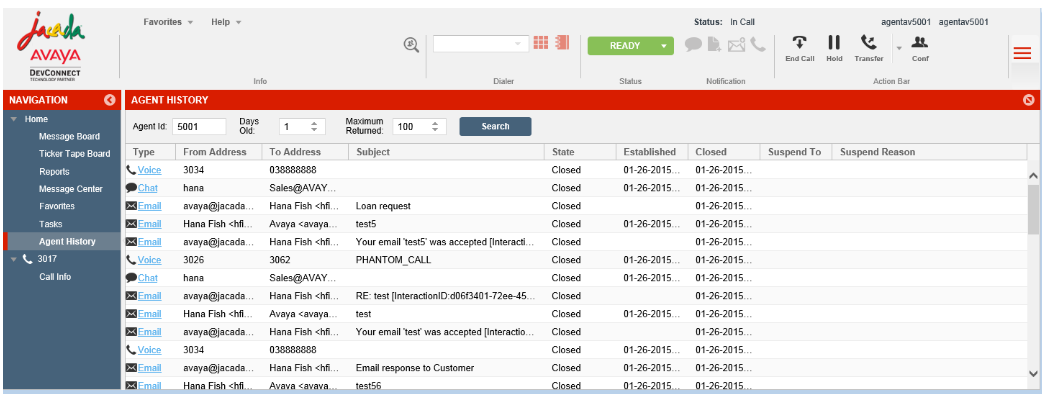
Favorites	Commonly used websites or internal links.
Message Center	Enables supervisors to send messages to agents. This option is available to supervisors only.
Reports	Generates reports. This option is available to supervisors only.
Tasks	Lists tasks assigned by your supervisor to a group of agents.
Agent History	Displays records for all closed conversations attributed to a particular agent, over a determined period of time.

Note: Navigation tabs are customized by your organization.

Active conversations are listed below the Home tree, each one on a separate node. Refer to Conversation Context for a description of the Voice, Email, and Chat conversation views.

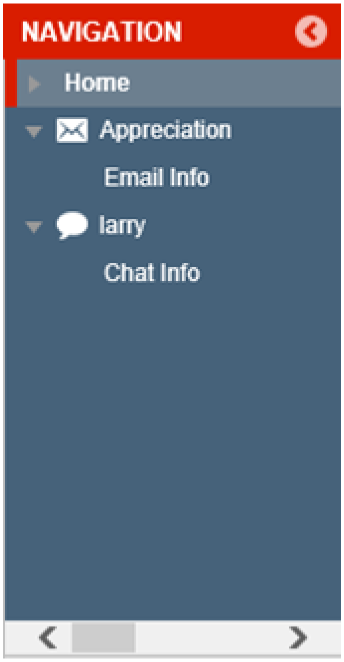
To open a view from the Navigation bar:

1. In the *Navigation* bar, click on the view to open. The view opens in the main screen.



To show or hide the Home tree:

1. Click the down arrow to the left of the node. The node collapses, hiding the list of views.



2. Click the right-pointing arrow to the left of the node. The node expands displaying the list of views.

To switch between views:

- If you have more than one conversation open at a time, switch between them by selecting a different item on the Navigation bar.

Conversation Context

Jacada WorkSpace supports multiple concurrent Voice, Email, and Chat conversations, enabling you to have more than one active conversation open at a time, from the same desktop. Active conversations are listed on the Navigation bar by conversation type: Voice, Email, or Chat. They also appear in the conversation list on the toolbar.

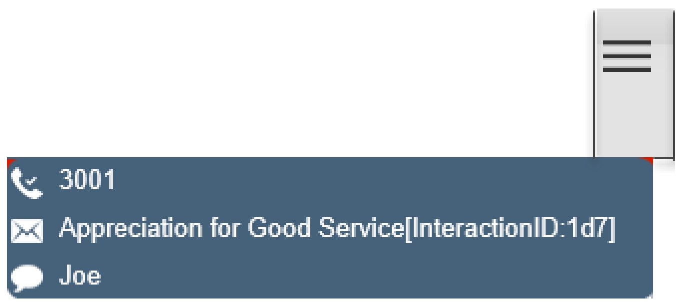
WorkSpace displays a unique screen for each of these conversation types. For details, see:

- Voice Context
- Email Context
- Chat Context

You can view only one conversation area at a time, but you can easily switch between open conversations. For example, when you are editing an email, you can accept an incoming call. The call screen will replace the open email screen. Alternatively, you may service a customer email while responding to a chat message. You may also view the contents of an earlier conversation during your call, email, or chat session with a customer.

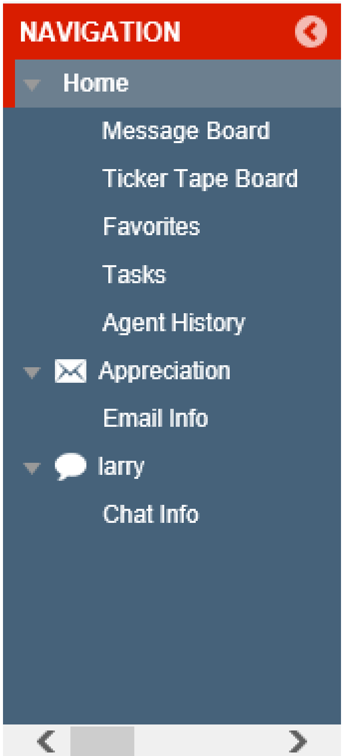
To switch between active conversations:

- On the toolbar, click the Conversation List icon and select a conversation from the list.
  The selected conversation view opens in the WorkSpace screen.



or

- In the *Navigation Bar*, select a conversation from the list.
  The selected conversation view opens in the WorkSpace screen.



On the navigation bar, active conversations appear as follows:

- **Calls** display the customer phone number
- **Emails** display the email subject
- **Chats** display the customer name

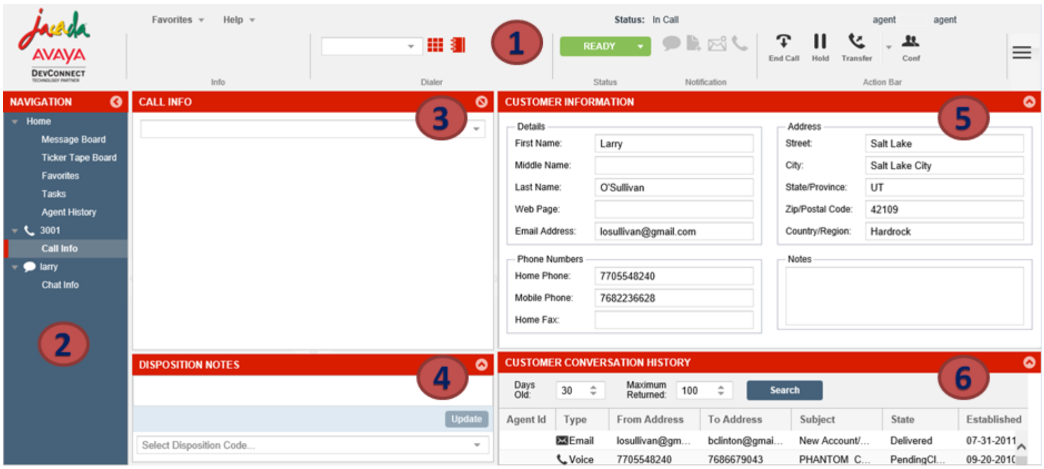
To expand the conversation area:

- In the title bar, click the double-headed arrow.

The conversation area expands to fill the WorkSpace screen.

Voice Context

When you accept an incoming call, WorkSpace displays the Voice Conversation view.



For information on managing calls, see [Managing Voice Conversations](#).

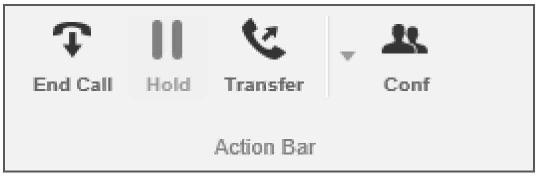
The following table describes the sections of the Voice conversation view.

Item	Section	Description
1	Toolbar	The Customer Info area displays the customer name and phone number. The Action bar displays the voice conversation action icons.
2	Navigation Bar	Displays a phone icon and the customer phone number for active calls.
3	Call Info Editor	Displays a customized list of guidance scripts to assist you during the call.
4	Disposition Notes and Codes	Displays an empty field for you to record information about the call and a drop-down list of disposition codes.

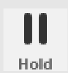
5	Customer Information	Lists customer details such as name, phone numbers, address and any additional notes.
6	Customer Conversation History	Lists previous conversations with the same customer.

Voice Toolbar

When working in Voice context, the toolbar displays the customer name and phone number in the customer information, and common voice conversation icons in the Action bar.



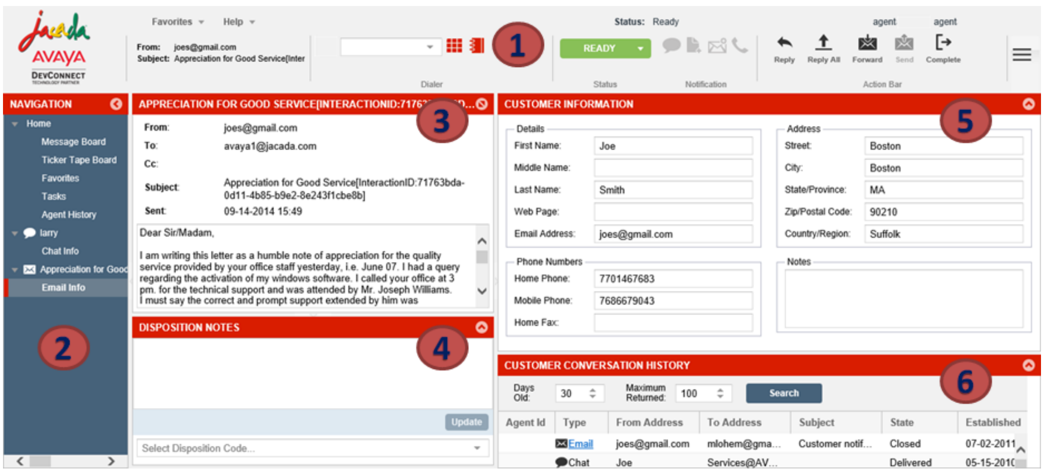
The following table describes the icons on the voice action bar.

Icon	Description
	**End call** - Ends call while keeping call conversation open for after call work.
	**Hold call** - Places incoming caller on hold.
	**Off Hold** - Unholds the call and returns caller to agent. Available only when call is on hold.
	**Transfer** - Transfers call to call queue or another agent or supervisor. Select *Warm* or *Cold*.

	Complete Transfer - Select *Complete* to complete the transfer or select *Return* to return the caller to yourself.
	Return - Returns transferred call back to original agent.
	Conference - Enables agent to connect to internal call.
	Join Conference - Available when agent calls a third party.
	Close - Closes call conversation screen. Available only after ending a call.

Email Context

When you open an email, WorkSpace displays the Email Conversation view.



For information on managing Email, see [Managing Email Conversations](#).

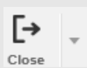
The following table describes the sections of the Email conversation view.

Item	Section	Description
1	Toolbar	The Customer Info area displays the From address and Subject, and the Action bar displays the email action icons.
2	Navigation bar	Displays an email icon and the conversation subject for active emails.
3	Email Editor	Displays the email subject in the title, the sender's email details, and the email message. In edit mode (Reply or Forward), displays an address area for specifying your recipients, space for entering your message, and the original email text.
4	Disposition Notes and Codes	Displays an empty field for you to record information about the call and a drop-down list of customized disposition codes.
5	Customer Information	Displays customer details such as name, phone numbers, address, and any additional notes.
6	Customer Conversation History	Lists records of previous conversations with the same customer.

Email Toolbar

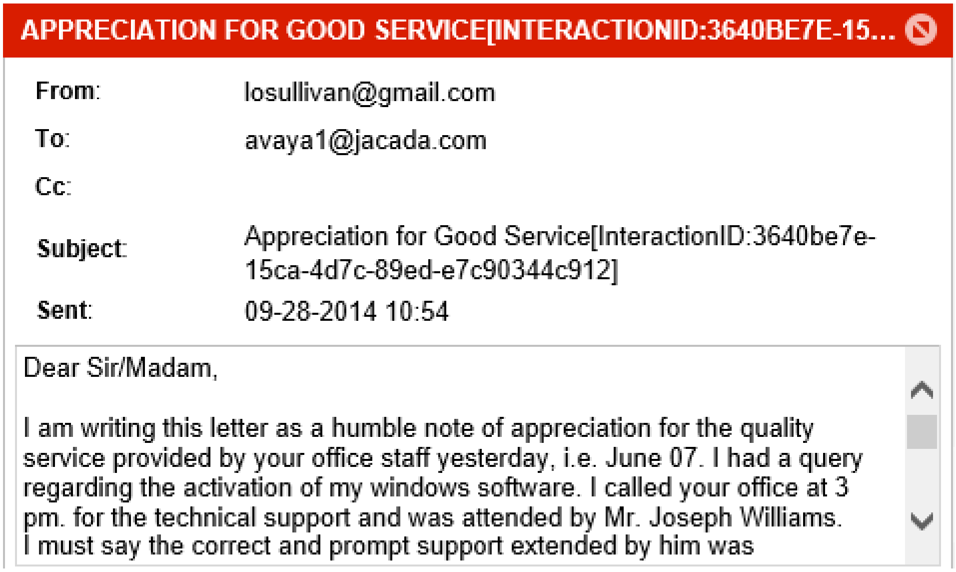
When working in Email context, the toolbar displays the customer email and subject in the customer info area, and the common email task icons in the Action bar.

The following table describes the icons on the voice Action bar.

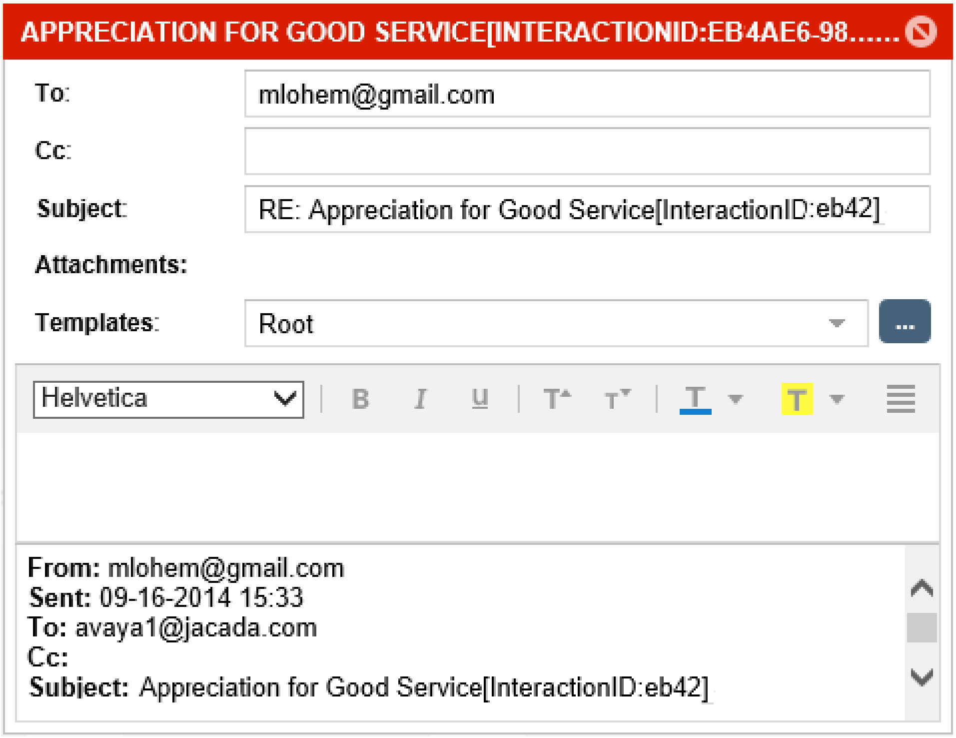
Icon	Description
	**Reply** - Sends a reply email to the sender.
	**Reply All** - Sends a reply email to the sender and all the original recipients.
	**Forward** - Sends the email to a new recipient.
	**Send** - Sends the email to the specified recipient(s).
	**Close** - Select *Close* to close a reply or forward email without sending, and return to the incoming email, or select *Complete* to close the email conversation.
	**Complete** - Closes the email conversation screen.

Email Editor

In an active email conversation, the email editor appears at the top left of the screen and includes the email details and message content.

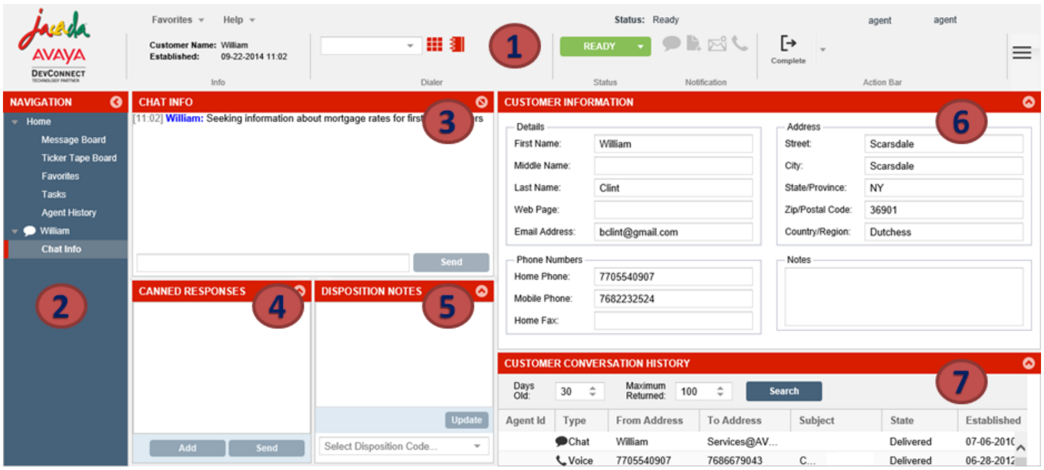


When you reply or forward the email, enter your recipient address(es) and text in the email editor. The original text appears below your reply or forward text. You may also choose a text template and attachments to send with your email.


APPRECIATION FOR GOOD SERVICE[INTERACTIONID:EB4AE6-98......
To:
mlohem@gmail.com
Cc:
Subject:
RE: Appreciation for Good Service[InteractionID:eb42]
Attachments:
Templates:
Root
Helvetica
From: mlohem@gmail.com
Sent: 09-16-2014 15:33
To: avaya1@jacada.com
Cc:
Subject: Appreciation for Good Service[InteractionID:eb42]

Chat Context

When you accept an incoming chat message, WorkSpace displays the Chat Conversation view.



For information on managing Chat, see Managing Chat Conversations.

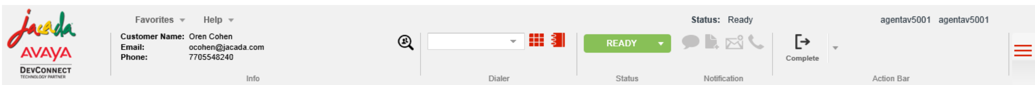
The following table describes the sections of the Chat conversation view.

Item	Section	Description
1	Toolbar	The Customer Info area displays the customer name and date/time of message. The Action bar displays the chat action icon.
2	Navigation bar	Displays a chat icon and the customer name for active chat sessions.
3	Chat Editor	Displays the incoming chat message and a field for entering your response.
4	Canned Responses	Lists customize pre-defined text that can be inserted into the chat message.

5	Disposition Notes and Codes	Displays an empty field for you to record information about the call and a drop-down list of disposition codes.
6	Customer Information	Lists customer details such as name, phone numbers, address and any additional notes.
7	Customer Conversation History	Lists previous conversations with the same customer.

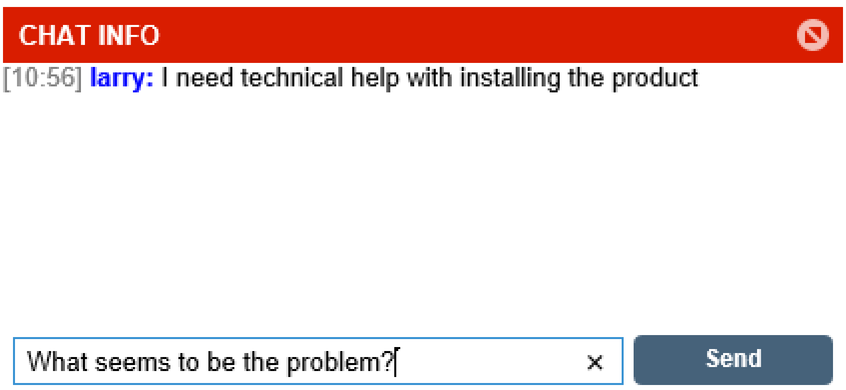
Chat Toolbar

When working in Chat context, the toolbar displays the customer name and time/date of the chat in the customer info area, and a single chat icon in the Action bar (Complete).



Chat Editor

In an active chat conversation, the chat editor appears at the top left of the screen and includes the chat messages and your responses.

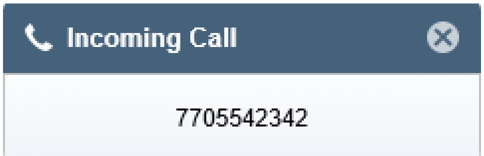


When you enter your reply and click *Send*, your text appears below the most recent message.

Notifications

When a new call, email, or chat message arrives, two notifications appear:

- A pop-up notification appears on the lower right corner of the screen.



- An icon flashes on the toolbar.

Icon	Description
	Incoming Chat
	Incoming Email
	Incoming Call

Clicking on the pop-up notification or on the flashing icon will open the new incoming conversation.

Disposition Notes and Codes

The *Disposition Notes* portlet appears below the open voice, email, or chat editor and includes an empty field for you to record information about the call, email, or chat, as well as a customized list of disposition codes.

The disposition portlet has two sections:

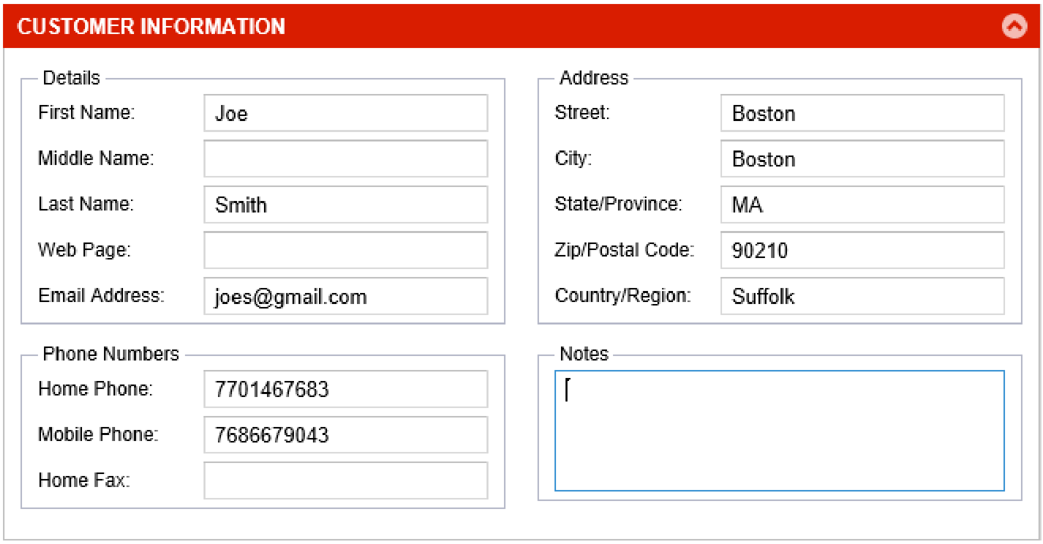
Notes – An area for summary notes that you write in free text. Notes could include the topics of discussion, specific information given, or follow-up tasks. As you write you must update the notes in order to save them. You may include as many notes as required. Once you finish a conversation, the notes are stored on the server along with other conversation details.

Disposition Codes – A drop-down list containing one or more pre-configured labels created by your system administrator that you can select and add to the disposition. Use these labels to help categorize portions of your conversation. Choose disposition codes from a drop-down list, and add as many to the disposition as required.

For instructions on creating disposition notes and using disposition codes, refer to Creating Disposition Notes.

Customer Information

The *Customer Information* portlet appears in the upper right corner of the WorkSpace screen. It displays general information about the current customer when you are in Email, Voice, or Chat conversation context. This information may not be edited.



The *Customer Information* portlet is divided into four sections with headings that can be customized by your organization. The information is automatically filled in when you accept an incoming call, email, or chat from a current customer.

The following table describes a typical customer information area.

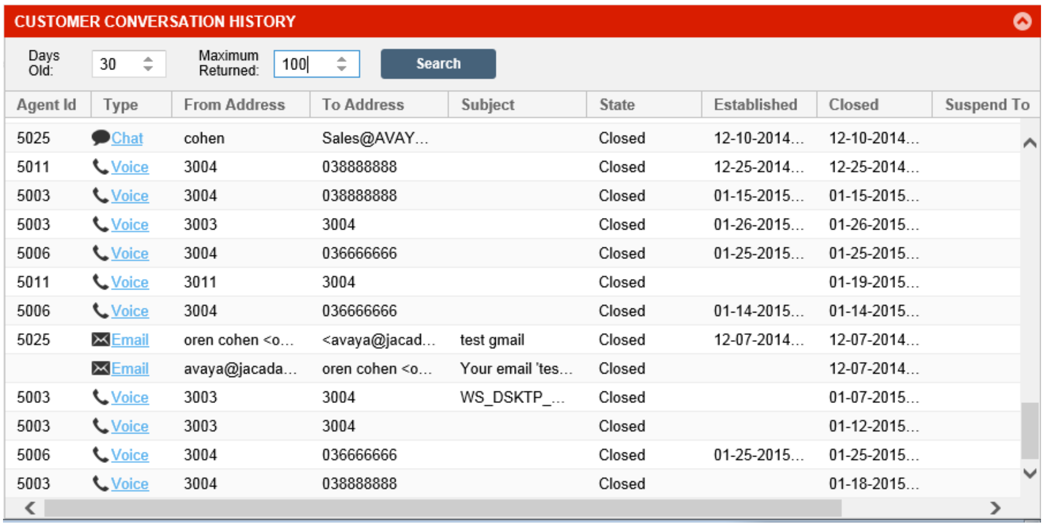
Heading	Description
Details	Displays the customer's First Name, Middle Name, Last Name, Web Page and Email address if available.
Phone Numbers	Displays the customer's Home, Mobile and Fax numbers if available.
Address	Displays the customer's Street, City, State/Province, Zip/Postal Code, and Country/Region if available.

Notes	Displays notes about the customer entered by your administrator.

Customer Conversation History

The Customer Conversation History appears on the lower right side of the screen when you are in an active voice, email, or Chat conversation, and is specific to the current customer.

To view the details of a previous voice, email or chat interaction, refer to Searching Agent History or Searching Customer History.


CUSTOMER CONVERSATION HISTORY

Days Old: 30 Maximum Returned: 100 Search

Agent Id	Type	From Address	To Address	Subject	State	Established	Closed	Suspend To
5025	Chat	cohen	Sales@AVAY...		Closed	12-10-2014...	12-10-2014...	
5011	Voice	3004	038888888		Closed	12-25-2014...	12-25-2014...	
5003	Voice	3004	038888888		Closed	01-15-2015...	01-15-2015...	
5003	Voice	3003	3004		Closed	01-26-2015...	01-26-2015...	
5006	Voice	3004	036666666		Closed	01-25-2015...	01-25-2015...	
5011	Voice	3011	3004		Closed		01-19-2015...	
5006	Voice	3004	036666666		Closed	01-14-2015...	01-14-2015...	
5025	Email	oren cohen <o...	<avaya@jacad...	test gmail	Closed	12-07-2014...	12-07-2014...	
	Email	avaya@jacada...	oren cohen <o...	Your email 'tes...	Closed		12-07-2014...	
5003	Voice	3003	3004	WS_DSKTP_...	Closed		01-07-2015...	
5003	Voice	3003	3004		Closed		01-12-2015...	
5006	Voice	3004	036666666		Closed	01-25-2015...	01-25-2015...	
5003	Voice	3004	038888888		Closed		01-18-2015...	

The following table describes the Conversation History fields.

Heading	Description
Days Old	The number of previous days for which the records are displayed. Use the up or down arrows to increase or decrease the number of days to display. The default is 1. The maximum is 100.
Maximum Returned	The maximum number of history records to show. Use the up or down arrows to increase or decrease the maximum number of records to display. The default is 100. The maximum is 2500 records.

Search button	Click Search to update the Customer Conversation History records when you change the Days Old or Maximum returned fields.
Agent ID	The unique ID of the agent who received the conversation (work item).
Type	The conversation type: Voice, Email, or Chat.
From Address	The sender's email, phone number, or name.
To Address	The recipient email, phone number, or chat name.
Subject	The subject of an email or voice call. Chat messages do not have a subject.
State	Displays the current status of the conversation: • Created • Processing • Queued • Delivered • Established • PendingClosed • Suspended • Closed • Retrieved
Established	The date and time the conversation was established.
Closed	The date and time the conversation was closed.
Suspend To	For email only - displays the date/time an email was attended to after an agent suspended responding to it.
Suspend Reason	For email only - the reason for suspending the email.

To sort the customer conversation history, refer to Sorting Data.

Customizing the Interface

The following sections explain customizing how the portlets and their content is displayed:

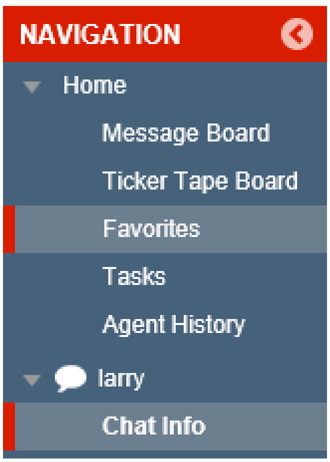
- Showing and Hiding Portlets
- Resizing Portlets
- Sorting Data

Showing and Hiding Portlets

By default, the standard portlets are open. Use the following procedures to hide or show a portlet.

To hide a portlet:

- In an open portlet, click the Arrow in the title bar.



The portlet closes, displaying only the title area.

To Show a Portlet

- In a closed portlet, click the Arrow in the title bar. The portlet expands.

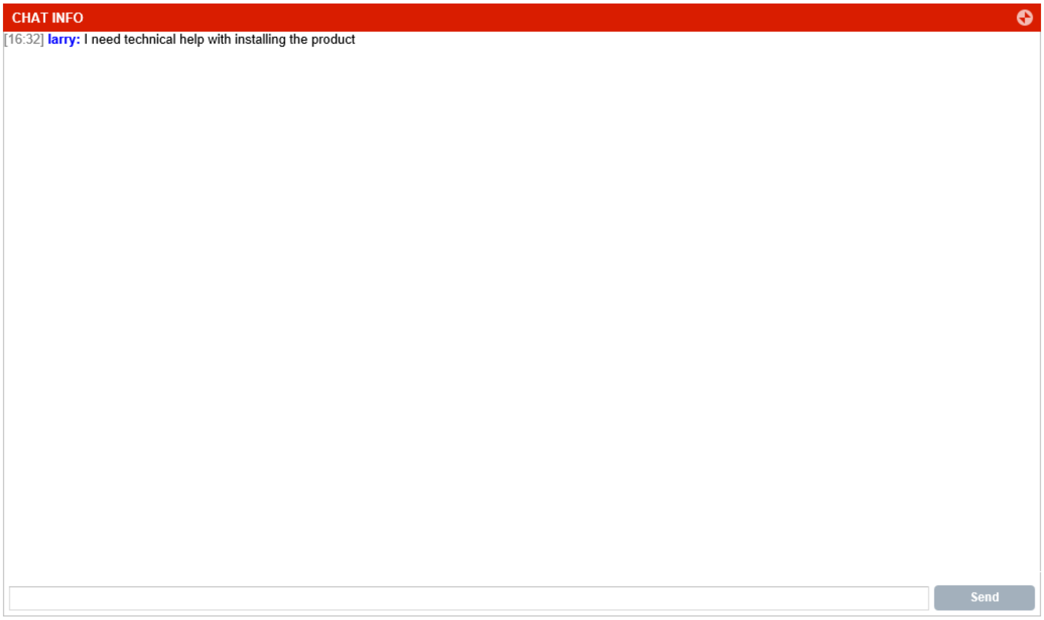
Resizing the Conversation Area

The conversation editing area (Chat Info, Email, or Call Info) can be enlarged on your screen to fill the WorkSpace desktop.

To resize the conversation area:

1. Click on the double-headed arrow on the title bar to enlarge the conversation area to fit your screen.

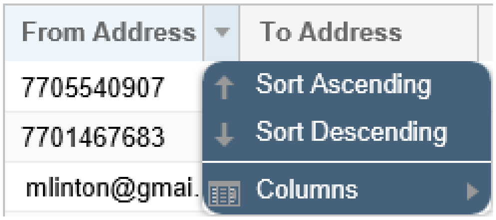
The conversation screen expands to fill the WorkSpace desktop.



2. Click on the double-headed arrow on the title bar to restore the portlet to its position on the WorkSpace desktop.

Sorting Data

When data are displayed in columns, you can sort any column in ascending (A-Z) or descending (Z-A) order.



To sort in ascending order:

- Click a column heading or click the arrow to the right and select *Sort Ascending*.
  The content appears in ascending order and an up arrow appears next to the column name.

To sort in descending order:

- Click the arrow to the right of the column heading and select *Sort Descending*.
  The content appears in descending order and a down arrow appears next to the column name.

4

Performing General Tasks

Agents may perform numerous tasks in addition to servicing customer interactions. These tasks include:

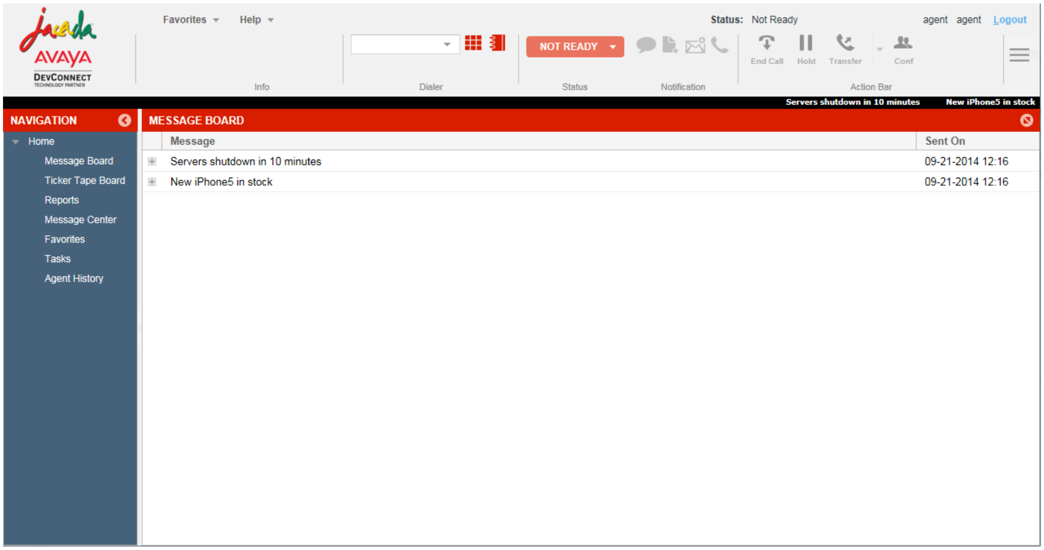
- Viewing Messages
- Using Favorites
- Managing Tasks
- Creating Disposition Notes
- Searching Customer Information
- Searching Agent History
- Searching Customer History

Viewing Messages

Your system administrator may leave messages for you to read before or during your shift. Messages may appear on the Welcome screen, in the Message Board, and as Ticker Tape. In some cases, you are required to view messages before you start your shift.

Message Board

The Message Board in the Navigation bar displays messages intended for the logged in agent. When you first open WorkSpace, the default screen displays the message board.



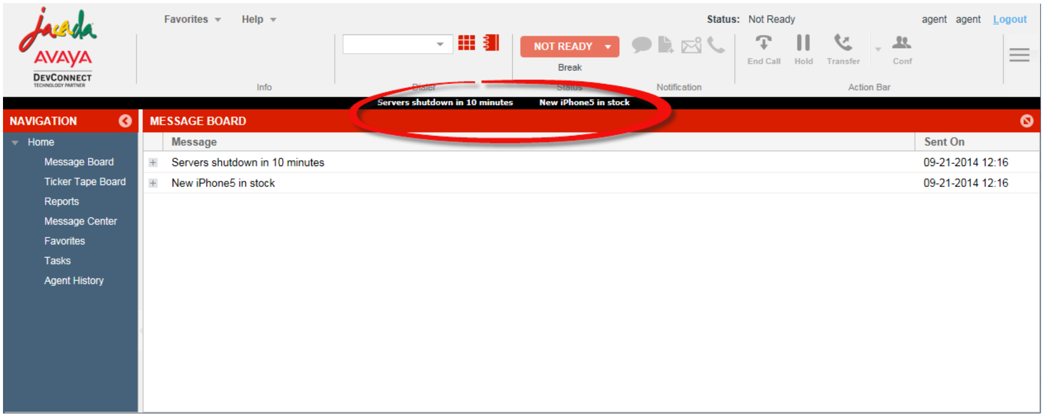
To view a message from the Message Board:

- Click the plus sign next to the message subject.
  The message text appears.

You may not edit the message board area.

Ticker Tape Messages

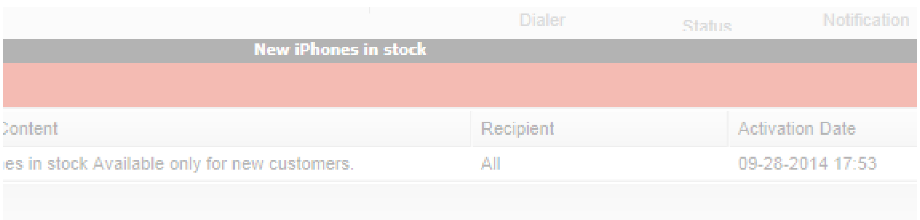
Supervisors may create internal messages for the agents. The messages automatically appear in the agent's message board. In addition, a supervisor can choose to display the message as a *Ticker tape* that continuously scrolls horizontally across the top of the WorkSpace screen, and/or in the WorkSpace welcome screen. The ticker tape messages appear in all WorkSpace screens just below the toolbar, regardless of the current work context.

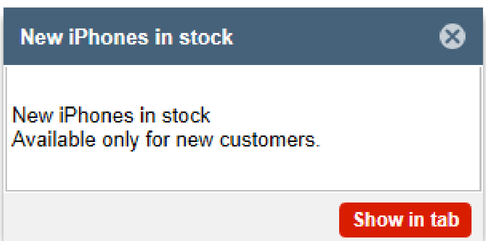


To view the ticker tape message temporarily, open it in a separate window. To read a long message, you may want to display it in the ticker tape tab.

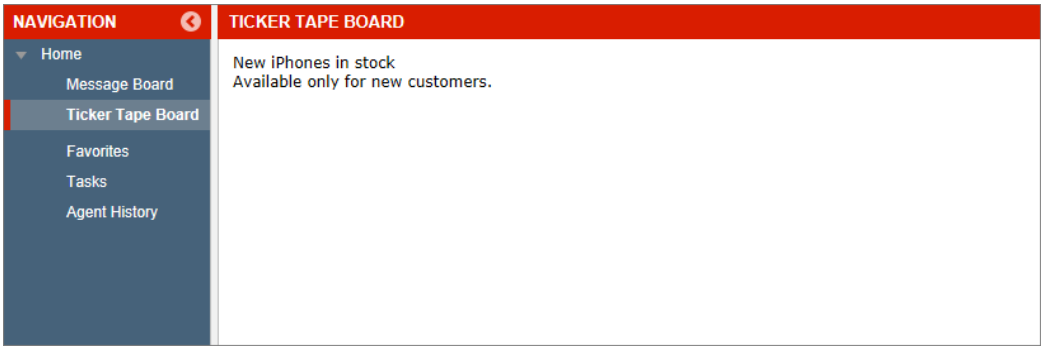
To view a ticker tape message:

1. To pause the message, position the mouse pointer over the title in the ticker tape.
2. To display the full message, click on the title in the ticker tape.
   The message opens in a new window.





3. To view the message in the *Ticker Tape* tab, click *Show in Tab*.
   The message appears in the *Ticker Tape* tab.



Once the message has been opened in the *Ticker Tape* tab, it can be referenced from the Ticker Tape Board for the duration of your work session.

Using Favorites

Favorites are commonly used websites or internal links. First, add favorites to the WorkSpace Favorites menu. Then, you can easily open favorites from the WorkSpace interface:

- From the *Favorites* tab in the Navigation bar
- From the *Favorites* menu above the toolbar

All favorites are accessible from the *Favorites* menu. The *Favorites* tab in the Navigation bar only displays favorites that were configured to open in the *Favorites* tab.

Adding Favorites

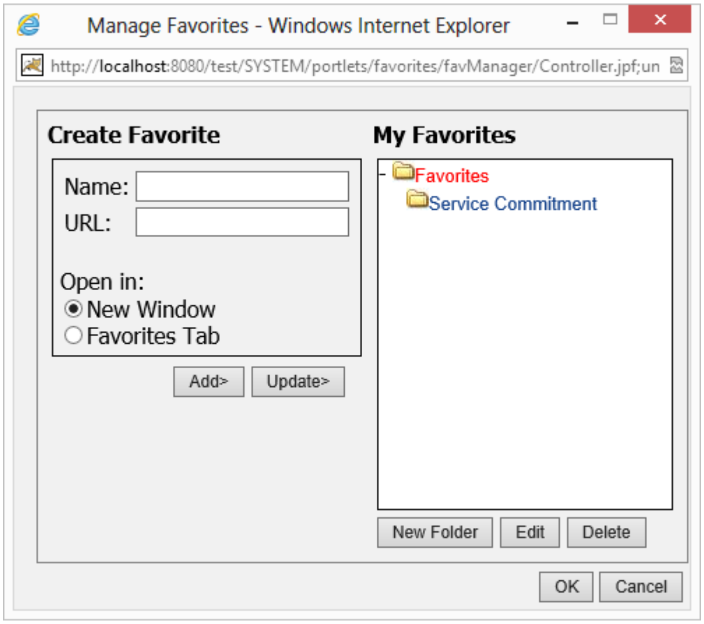
Favorites are commonly used websites or internal links. Use the *Favorite* menu to manage favorites and provide quick access to any website from within the WorkSpace environment. For example, add to the *Favorites* menu your company website or links to internal sites relating to your company customer service procedures.

You can determine whether the site will open in the favorites tab in the WorkSpace screen or in a separate browser window.

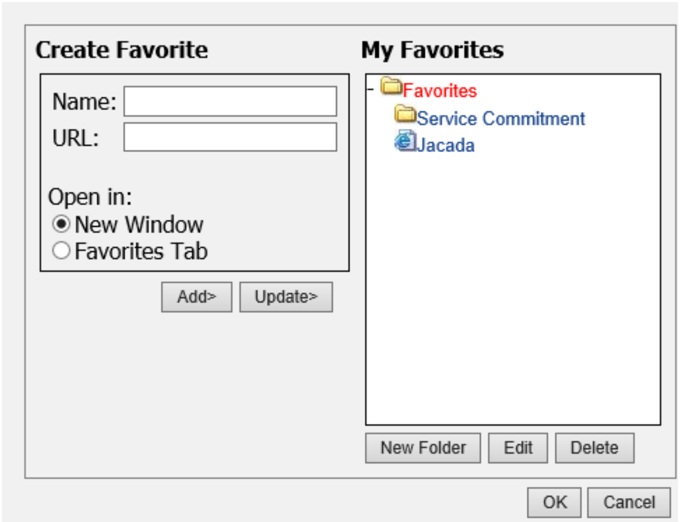
Use the following procedure to add a favorite to the list.

To add a favorite to the Favorites menu:

1. In the Menu bar, click *Favorites* and select *Manage Favorites*. The *Manage Favorites* window opens.



2. Under *Create Favorite*, enter a name for the website and the URL.
3. Select how the website should open:
   Open in a *New Window* - the site opens in a new browser window
   or
   Open in *Favorites Tab* - the site opens in the Favorites tab in the main WorkSpace screen.
4. Click *Add*. The name appears in the list of *My Favorites*.

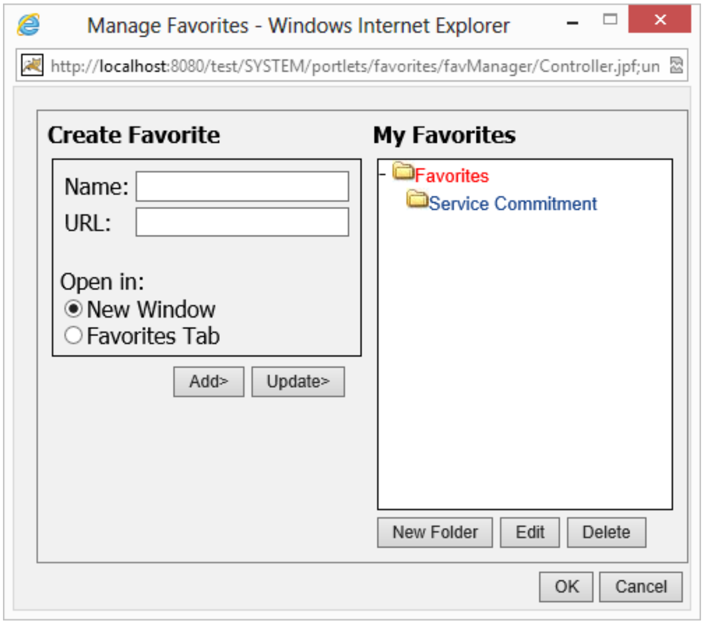


5. Click *OK*. The Favorites window closes and the name appears in the Favorites tab in the Menu bar.
   If you chose *Open in: Favorites Tab*, the site is also accessible from Favorites in the Navigation area. For more information, see Using Favorites.

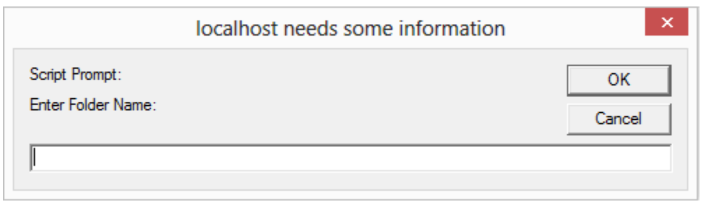
You can arrange your favorites into sub-folders for categorizing different types of links. Use the following procedure to add a favorite to a particular folder.

To create a new Favorites folder:

1. In the Menu bar, click *Favorites* and select *Manage Favorites*. The *Manage Favorites* window opens.

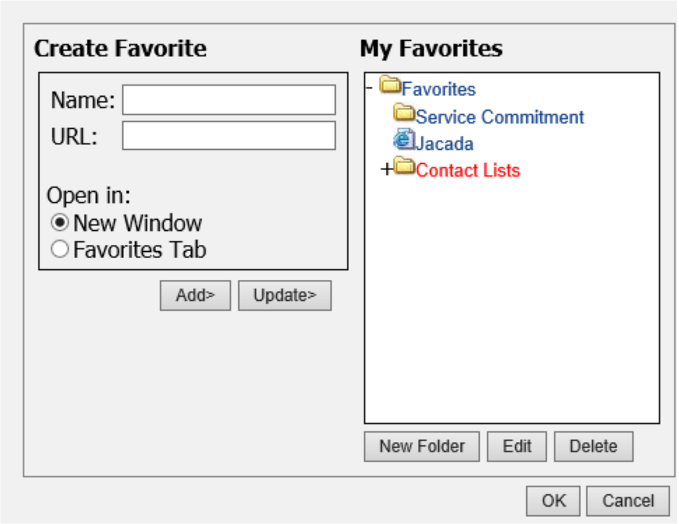


2. In the *My Favorites* area, click on the *Favorites* folder or any other folder. When the folder is active, the text appears in red.
3. Click *New Folder*. The New Folder window opens.



4. In the text field, enter a name for the new folder and click *OK*. The folder appears in the *My Favorites* list under the selected folder.

5. Double-click on the new folder name. A plus sign appears next to the folder name indicating that it is active.



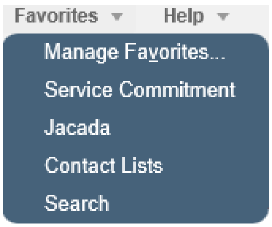
6. Continue to add favorites to the new folder. When you click *Add*, the new favorite is added to the active folder.
7. To view the new favorite, click the plus sign next to the new folder. The favorite appears under the folder name.
8. Click *OK*. The *Favorites* window closes and the new link appears under the selected folder in the *Favorites* tab in the Menu bar.

Opening Favorites

Use the following procedures to open a favorite link.

To open a favorite from the menu:

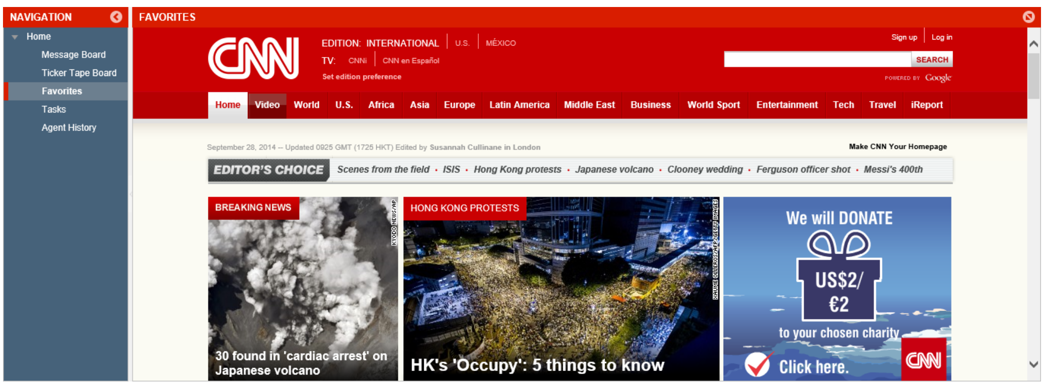
- Click the *Favorites* menu and select a link from the list.



The link opens in the *Favorites* tab or in a new browser window, as configured.

To open a favorite from the Navigation bar:

- In the *Navigation* bar, click *Favorites*. Select from the list of favorites configured to open in the Favorites tab.
  The link appears in a portlet in the active WorkSpace screen.



To exit the *Favorite* screen, select another view from the Navigation bar.

Managing Tasks

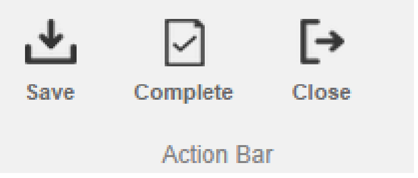
Tasks are configured by system administrators and assigned to a group of agents according to their roles. Depending on your privileges, you can view a list of assigned tasks, claim tasks for yourself, and assign tasks to other agents. The task list is saved in the database, and therefore is maintained across Jacada WorkSpace sessions.

To complete a task you may be required to input and save details in the task editor.

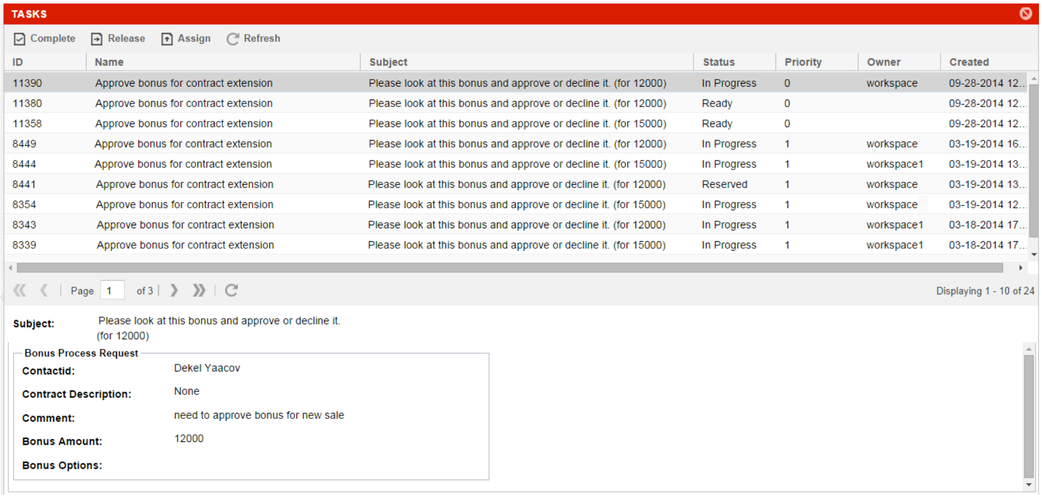
Open the *Tasks* pane from the Navigation bar to perform the following task actions:

- Viewing Tasks - See a list of all tasks allocated to your group
- Assigning Tasks - Assign a specific task to another agent
- Claiming Tasks - Assign a specific task to yourself
- Editing Tasks - Open a specific task to supply details on how the task is being handled
- Releasing Tasks - Release an assigned task to the queue
- Completing Tasks - Complete a task that you own

When you open Tasks from the navigation bar, the toolbar displays task information and task icons appear in the Action Bar.



The *Tasks* pane displays the task list, and the details of a selected task.



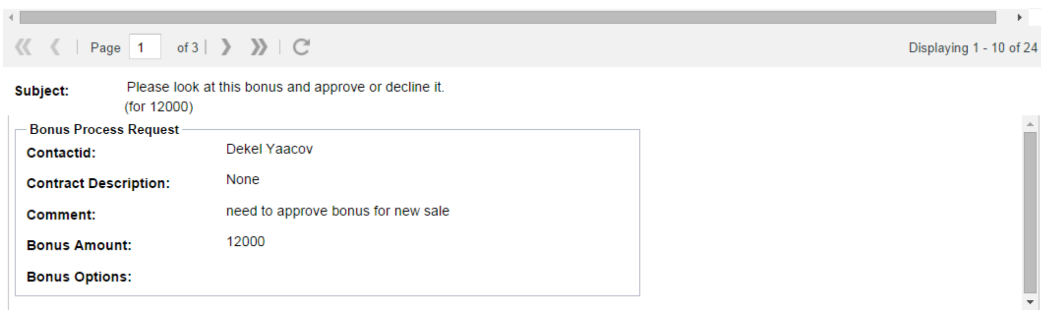
The following table describes the Task context.

Item	Description
Complete	Click to indicate the task has been completed.
Claim/Release	This icon is a toggle. Click *Claim* to take the task for yourself. Click *Release* to return a claimed task to the queue.
Assign	Click to assign the task to another agent.
Refresh	Click to refresh and update the task list.
ID	Unique task ID.
Name	Task name.
Subject	Task subject.

Status	**Ready** - Unassigned task. **In Progress** - Assigned to a different agent. **Reserved** - Assigned to current agent. Your organization may have a customized status list.
Priority	Indicates priority level for task.
Owner	Agent to whom the task is assigned.
Created	Date and time task was created.
Page selection	Enter a page number or use the left or right arrows to scroll through the task list.
Task details	Appear at the bottom of the screen for the selected task.

To view tasks:

1. In the *Navigation* bar, click *Tasks*.
   The task pane opens. Refer to the above figure.
2. In the open *Tasks* pane, select a task to view it.
   The task details appears below the task table.



To assign a task:

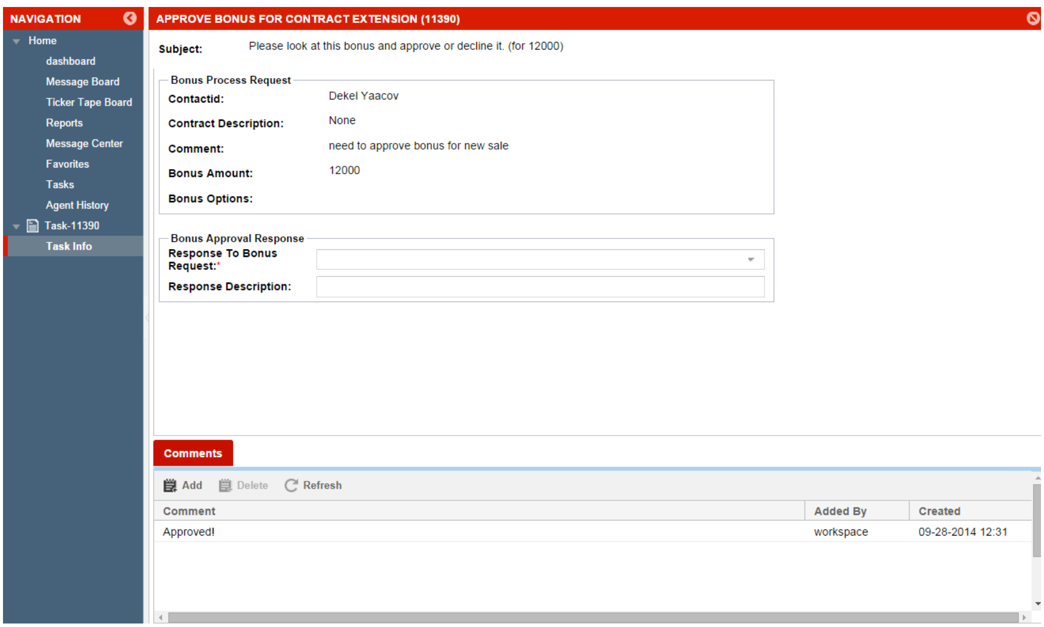
1. In the open *Tasks* pane, select a task and click *Assign*.
   The *Assign Task* window opens.
2. Specify the agent who will own the task.
   The task status changes to "In Progress" and the agent appears as the owner.

To claim a task:

- In the open *Tasks* pane, select a task and click *Claim*.
  You become the owner and the task status changes to 'Reserved".

To edit a task:

1. In the open *Tasks* pane, double-click a task to edit it.
   A new task editing pane opens displaying the task details and an area for inputting the response or solution. The fields vary depending on the task. The open task is also listed as a work item in the Navigation bar.



2. Input the relevant information.

3. From the toolbar, click *Save.*
   Your changes are saved.

4. To add or edit comments, refer to Task Comments.

5. When you have completed the task, click *Complete* on the toolbar*.* The task is removed from the task list.
   or,
   To close the task without completing it, click *Close* on the toolbar. The task remains in the list for you to continue working on it at a later time.

To release a task:

- In the open *Tasks* pane, select a claimed task and click *Release*.
  The task status changes to "Ready" and it is not assigned to an owner. The task can be reassigned to another agent.

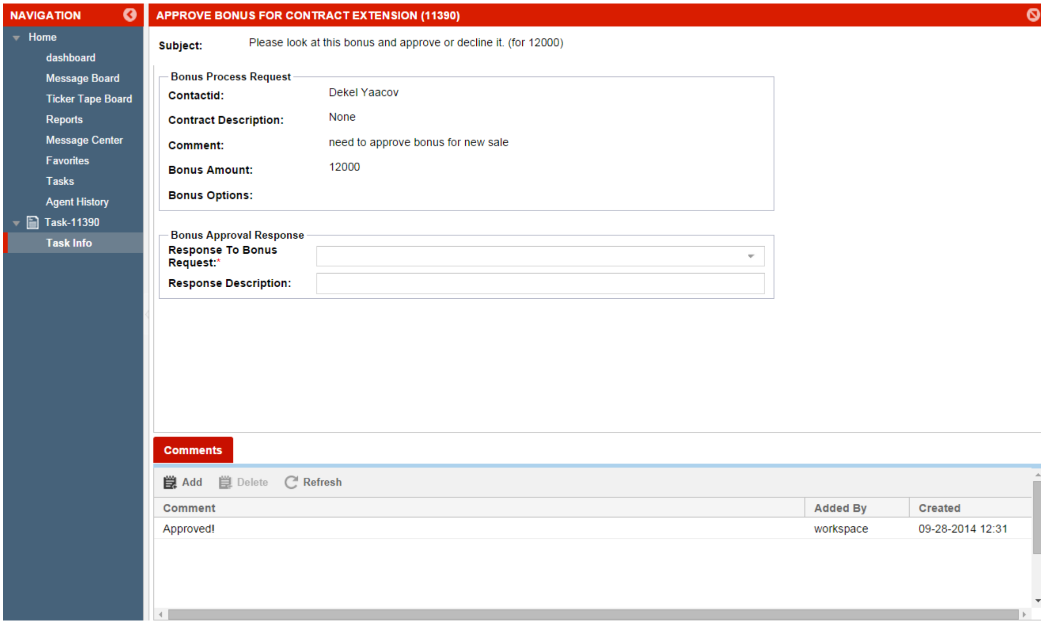
To complete a task:

- Once you have completed task assigned to you, select the task in the list and click *Complete*
  or,
  If viewing the task in edit mode, click *Complete* in the Action Bar.
  The task is removed from the task list.

Task Comments

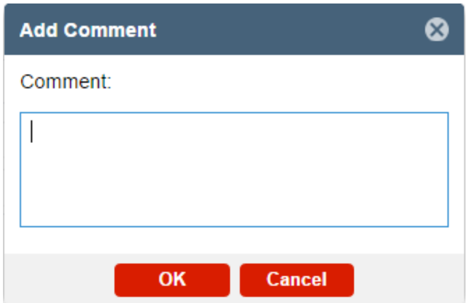
When you respond to a task, you may add comments that are not part of the task details. These comments are editable.

The *Comments* area appears in the task editor, below the task details and editing area.



To add a comment:

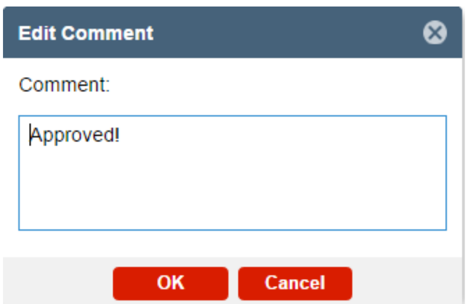
1. In the open task editor, in the *Comments* area, click *Add*.
   The *Add Comments* window opens.



2. Enter your comments and click *OK*.
   The *Add Comment* window closes and your comments appear in the *Comments* area.

To edit a comment:

1. In the open task editor, double-click the comment to edit. The *Edit Comment* window opens.



2. Edit the comment and click *OK*.
   The *Edit Comment* window closes and your comments appear in the *Comments* area.

To delete a comment:

- In the open task editor, select the comment to delete and click *Delete*.

Creating Disposition Notes

Disposition notes and codes provide an interaction history to assist you the next time you serve the customer, or to assist the next agent who may serve the customer. Administrators may make use disposition notes and codes as a way of analyzing calls and detecting patterns.

Use the Disposition Notes area of the active voice, chat, or email editor to enter a summary of your interaction. For an overview of the Disposition Notes interface, refer to Disposition Notes and Codes.

Once you close a chat or email session the disposition notes area also closes. Disposition notes can be added during or after a call. When you end a call, the call status changes to *In Call Wrap Up* and the call context stays open so you can complete the disposition notes. This is known as After Call Work. Once you have completed your disposition notes, *Close* the call.

Refer to the following procedures to complete disposition notes:

- Adding Disposition Notes
- Adding Disposition Codes
- Viewing Disposition Notes

Adding Disposition Notes

Enter disposition notes and codes when you are in an active voice, email or chat conversation. For calls, you may first end the call and then complete the disposition notes.

Use the same procedure to add disposition notes to voice, email, or chat conversations.

To enter disposition notes:

1. In the *Disposition Notes* area, type your comments.

2. Click *Update*. The notes are saved and a confirmation message appears.

3. To add more notes, repeat steps 1 and 2 as required.
4. Add Disposition Codes, if necessary. Refer to Adding Disposition Codes.
   When you close the call, email, or chat session your notes are saved in the database.

Adding Disposition Codes

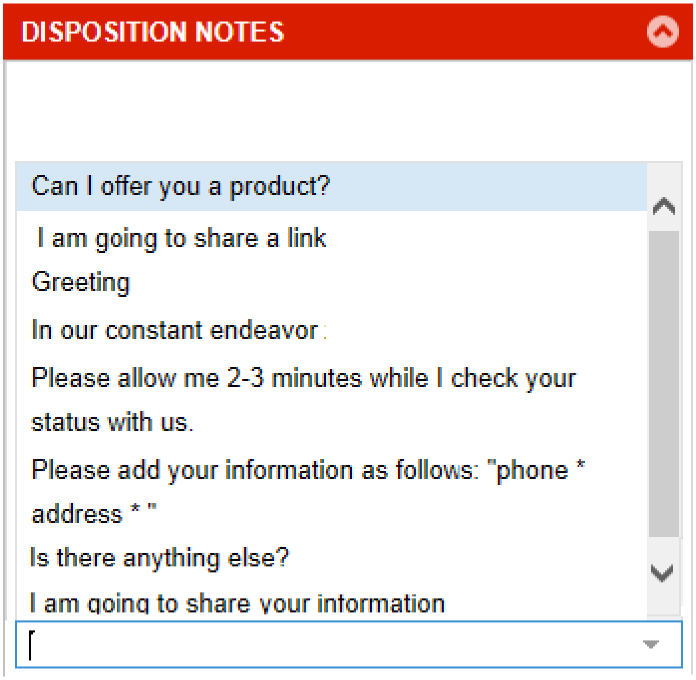
Disposition codes are unique labels created by your system administrator to provide a meaningful way of categorizing the topics discussed in voice, email or chat conversations and analyzing customer service patterns. When you select a disposition code it is automatically added to the disposition for the current conversation and it cannot be removed. Disposition codes do not appear in the disposition editing area. However, disposition notes and codes and can be seen when viewing a conversation history.

You may select more than one disposition code, as required. For example, if your customer requests to change the billing address, select a disposition code for 'changing billing address'. Later in the conversation, if the customer requests a price quotation, select the disposition code for 'price quote'.

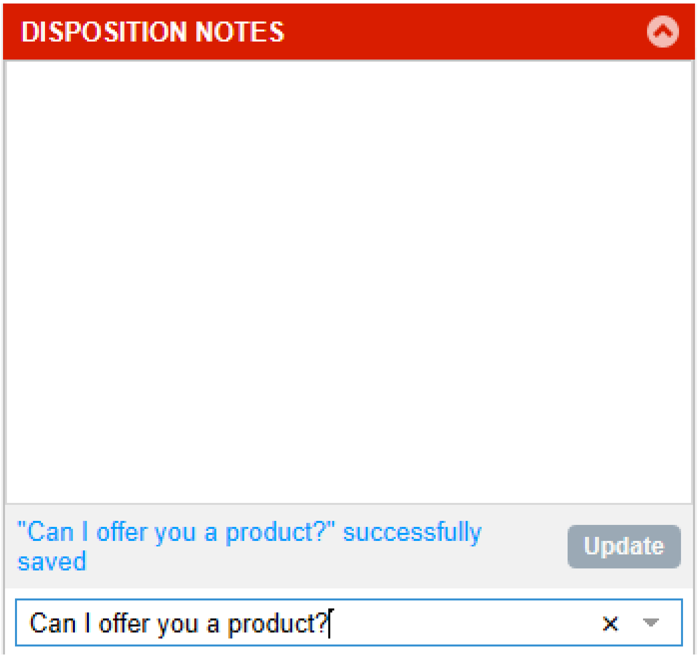
Caution:	Select disposition codes with discretion. They are automatically saved in the database and cannot be edited or deleted.

To add a disposition code:

1. In the *Disposition Notes* area, select a disposition code from the *Select Disposition Code* drop-down list.



The disposition code is saved automatically. A confirmation message appears.



Viewing Disposition Notes

Disposition notes and codes are saved to the database as part of the conversation details. If necessary, you can view the disposition notes at a later time. You may modify and add disposition notes. You may not modify disposition codes, but you may add new disposition codes.

To view or edit disposition notes:

1. In the *Navigation* bar, select *Agent History* and search for the conversation.

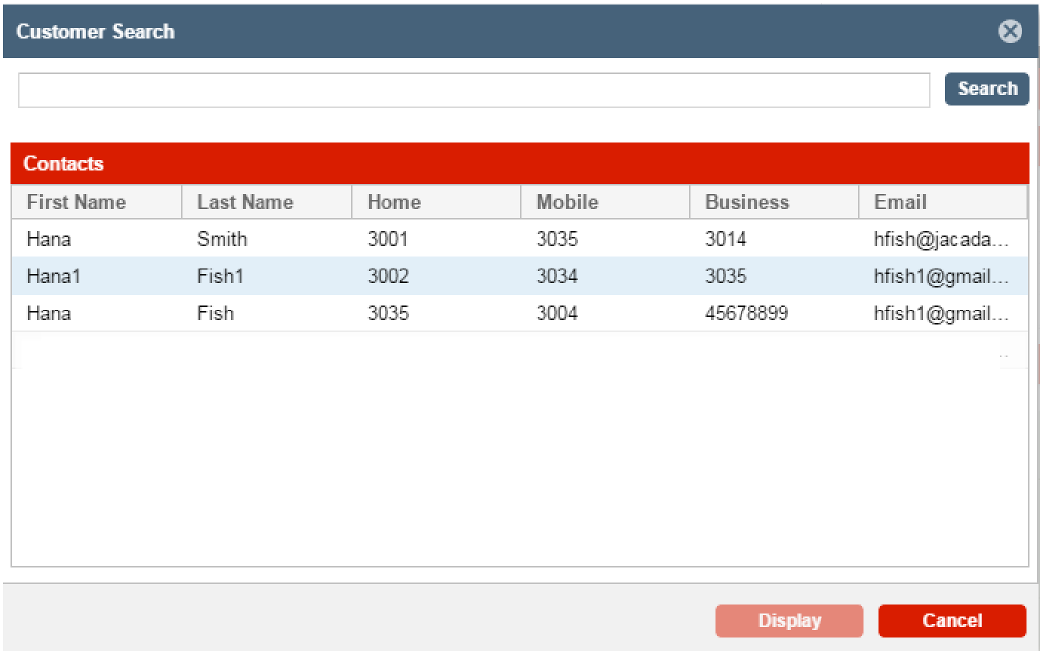
   or

   In the *Customer Conversation History* search for the conversation.
2. Select and open the conversation to view conversation details. The conversation context opens.
3. In the *Disposition Notes* area, modify or add disposition notes and click *Update*.
4. In the *Disposition Code* area, select additional disposition codes as required.
5. Close and complete the conversation.

Searching Customer Information

By default, when you enter a customer interaction context (Voice, Chat or Email), the system automatically performs a customer information search. If a single match for the customer is found in the database, data for that customer is loaded into the Customer Information portlet. If no matches are found, or if several matches are found, the Customer Search tool helps you quickly locate information for the correct customer.

When more than one customer record matches the search criteria, the *Customer Search* window opens automatically, displaying the relevant records. In the following example, three records are found for the first name *Hana*:



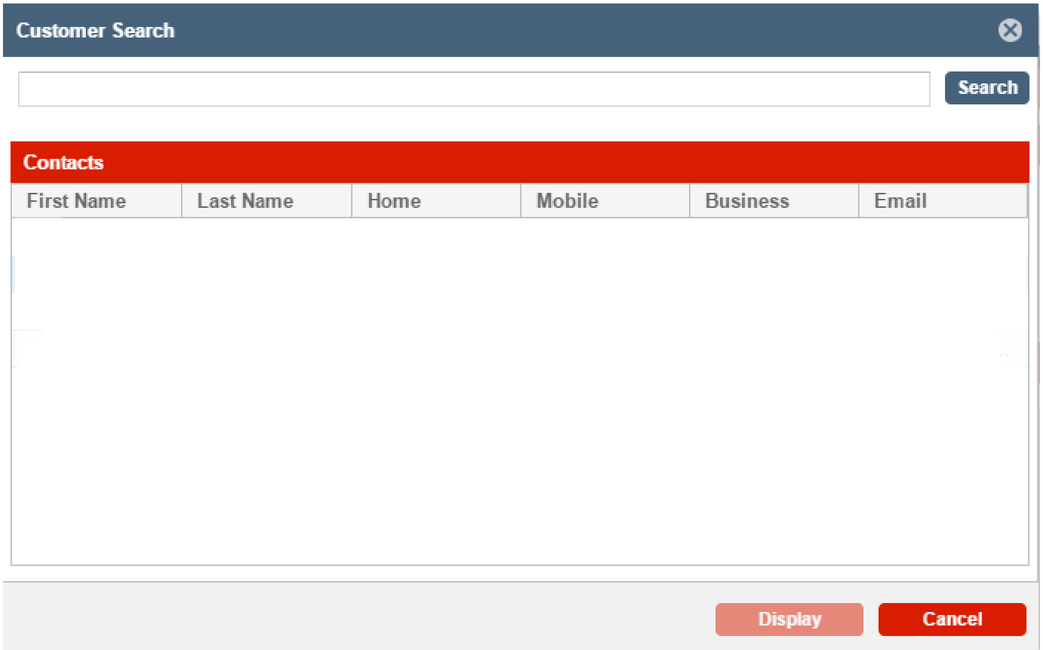
Double-clicking a row (or selecting a row and then clicking *Display*) loads the selected customer's information into the *Customer Information* portlet.

When no automatic match is found for a customer, you can use the Customer Search tool to perform a manual search for customer information. The Customer Search icon is enabled automatically when you are working in an interaction context.

To perform a search for customer information:

1. From the CTI toolbar, click .

   The *Customer Search* window opens.

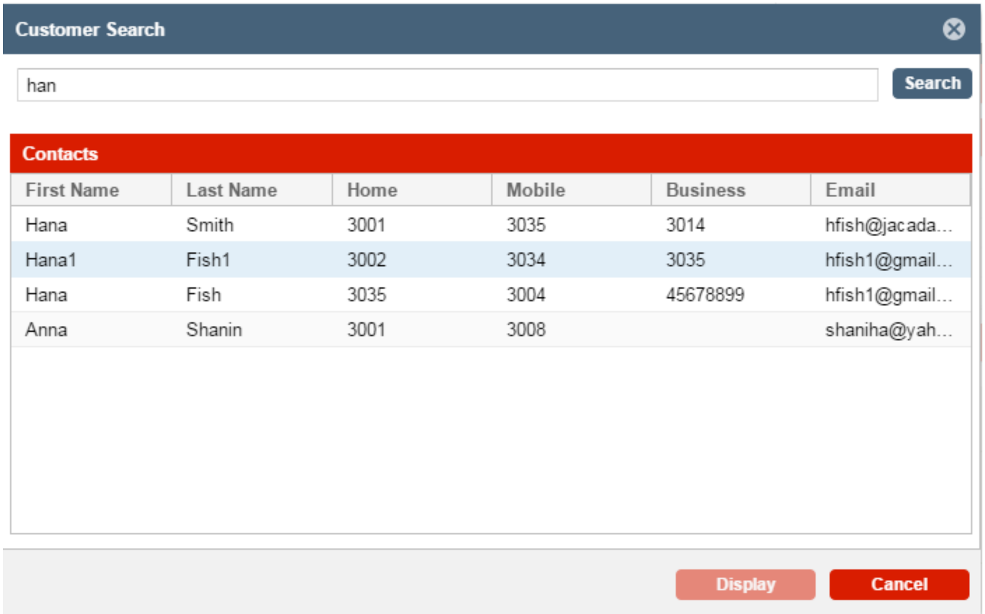


2. In the search box at the top of the window, enter a search term. You may search according to first or last name, phone number (home, mobile or business), or email address.

> **Note:** If a two-word search term is entered, a search for first name and last name will be done.

3. At the upper right corner of the window, click *Search*.

   The *Contacts* grid is populated with customer records that contain the search term. For example:



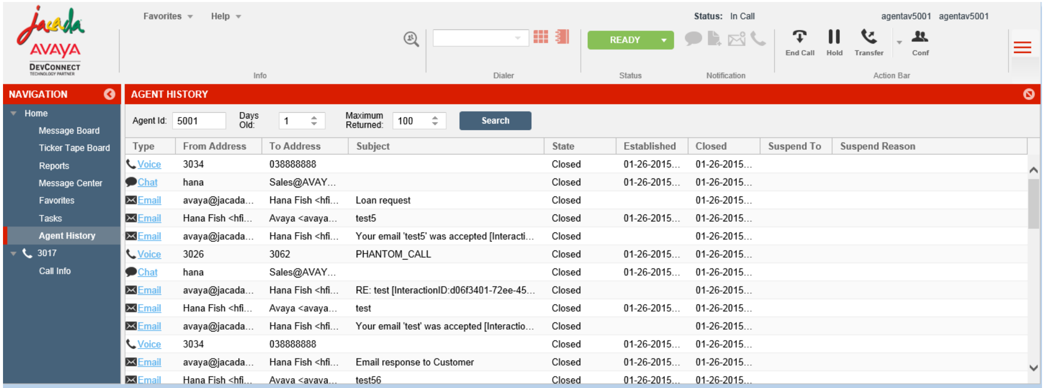
4. Double-click on the relevant row of the *Contacts* grid. Alternatively, select the row, and then click the *Display* button.

   The selected customer's information is loaded into the *Customer Information* portlet.

Searching Agent History

The *Agent History* tab opens a record of all closed and current conversations attributed to a particular agent, over a determined period of time. You may review your own conversation history or that of another agent by searching for conversation records in the Agent History.

The Agent History displays the same content as the Customer Conversation History, but is organized by receiving agent rather than by customer.



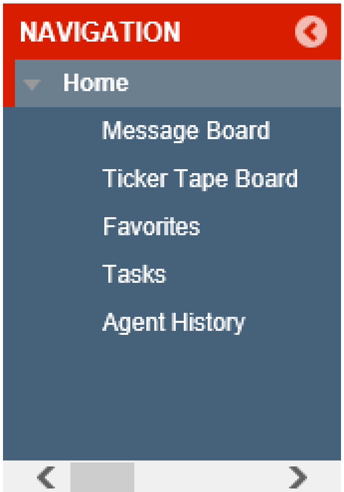
The following table describes the History fields. If the field is too narrow to view the contents, place your mouse pointer over the field to view the entire contents.

Field	Description
Agent ID	The unique agent code. By default, your own Agent ID appears and the Agent History displays your conversations. However, you can insert a different agent ID to view history items for that agent.
Days Old	The number of previous days for which the records are displayed. Use the up or down arrows to increase or decrease the number of days to display.The default is 1. Maximum is 100 days.
Maximum Returned	The maximum number of history records to show. Use the up or down arrows to increase or decrease the maximum number of records to display. The default is 100. The maximum is 2500 records.

Search	Click Search to update the Agent History records when you change the Agent ID, Number of days, or Maximum number of records returned.
Type	The conversation type: Voice, Email, or Chat.
From Address	The sender's email, phone number, or chat name.
To Address	The recipient email, phone number, or chat name.
Subject	The email subject. For calls and chat messages, there will not be subject.
State	The status of the conversation.
Established	The date and time the conversation began.
Closed	The date and time the conversation was closed.
Suspend To	For email only - Displays the date/time an email was attended to after an agent suspended responding to it.
Suspend Reason	For email only - The reason for suspending the email.

To search agent history:

1. In the *Navigation* bar under the Home node, click *Agent History*.



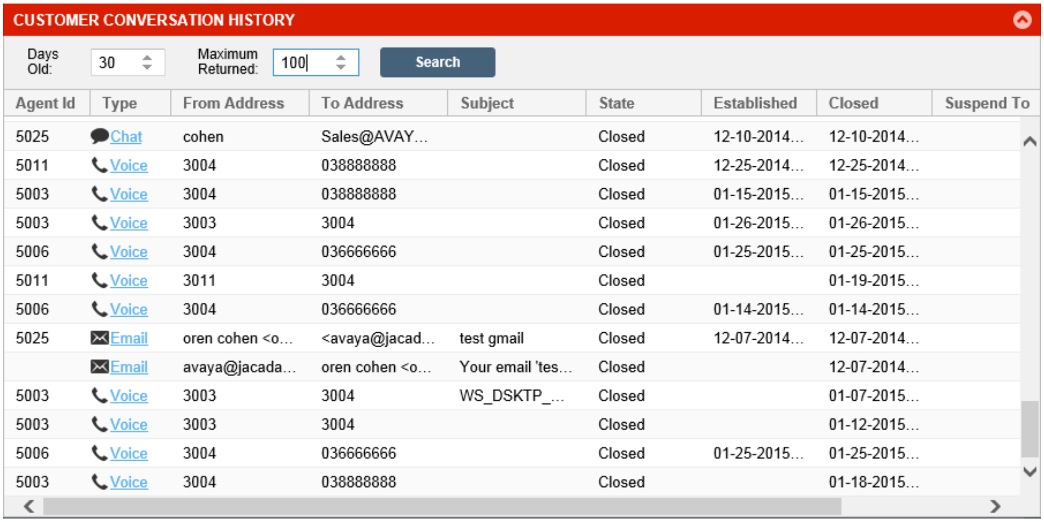
The *Agent History* portlet opens in the main WorkSpace screen. Refer to the above figure.

2. In the *Agent ID* field, enter the unique ID of the agent.
3. In the *Days Old* field, use the up or down arrows to how many previous days the search should include.
4. In the *Maximum returned* field, use the up or down arrows to determine how many records to show at once.
5. Click *Search*. The *Agent History* displays records for the search criteria.
6. Double-click on the specific record to view.
   The voice, email, or chat conversation opens. You can review the chat and email content, and edit the *Disposition Notes* for calls, email, or chat records. When you open an email, you may reply to it or forward it to another agent.

Searching Customer History

The Customer Conversation History appears in the conversation context during an active call, email, or chat conversation. Use it to search for previous conversations with the current customer.

Customer conversation history displays the same content as the Agent History, but is organized by customer rather than by receiving agent. Refer to Searching Agent History to search for conversations according to agent.



To search customer history:

1. In the *Customer Conversation History* area, determine the search criteria. In the *Days Old* field, use the up or down arrows to determine how many previous days the search should include. Refer to the above figure.
2. In the *Maximum returned* field, use the up or down arrows to determine how many records to show at once.
3. Click *Search*.
   The *Customer Conversation History* displays records for the search criteria.

4. Double-click the item to view.
   The voice, email, or chat conversation opens in the WorkSpace screen.

   Review chat and email content, and edit the *Disposition Notes* as required. When you open an email, you may reply to it or forward it to another agent.

Managing Voice Conversations

5

Jacada WorkSpace integrates telephony requirements for easy call control. For an overview of the call interface, refer to Voice Context.

WorkSpace supports the following call tasks:

- Receiving a Call
- Making a Call
- Putting a Call on Hold
- Transferring a Call
- Making a Conference Call
- Using Call Scripts
- Creating Disposition Notes
- Completing a Call

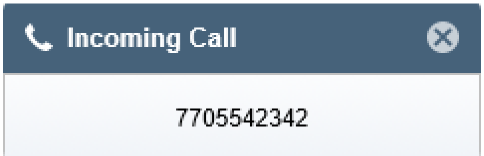
Receiving a Call

You are ready to receive external calls once you have logged in and changed your status to *Ready*. You may receive internal calls also in the *Not Ready* state.

When a new call arrives, a pop-up notification appears in the lower right hand screen and the Incoming Call notification on the toolbar flashes. You will receive incoming call notifications even when you have an active email or chat conversation.

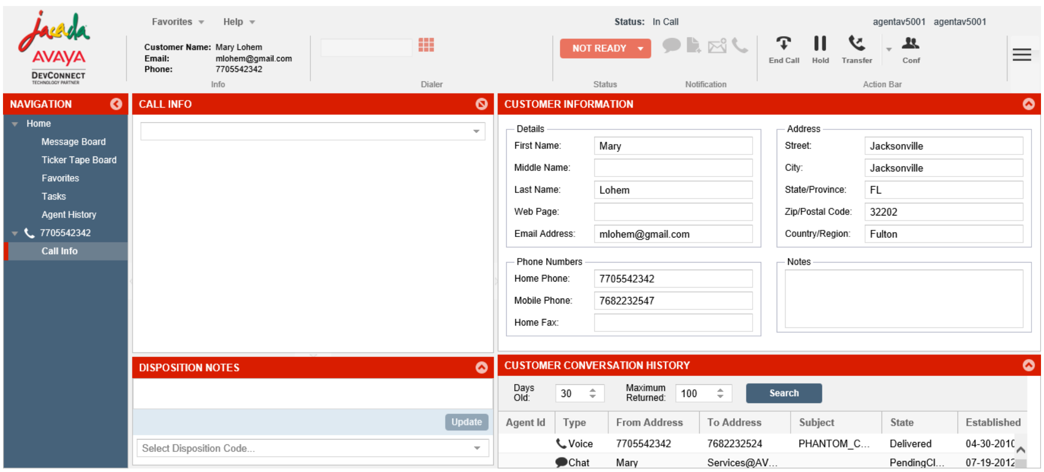
To answer a call:

- Click on the flashing *Incoming Call* icon  on the action bar or click the call pop-up notification in the lower right screen.



The call editor opens in the top left area of the screen. In the toolbar, the Customer Info area displays the customer name, email address, and phone number. The status area displays *In Call* and the Action bar displays the call icons.

In addition to the call information area, the screen displays [Disposition Notes](), [Customer Information](), and [Customer Conversation History]().



Disposition notes can be added during or after a call. When you end a call, the call status changes to *In Call Wrap Up* and the call context stays open so you can complete the disposition notes. Once you have completed your disposition notes, *Close* the call.

For an overview, refer to [Disposition Notes and Codes](). For instructions, refer to [Creating Disposition Notes]().

Making a Call

Agents may make internal calls only. Use the Dialer options to initiate a new internal call. Use Transfer or Conference to call another agent or supervisor while on a customer call.

The Dialer area on the toolbar includes a field for entering any internal number, a dial pad for clicking the numbers to dial, and a contacts directory for searching for and selecting a call recipient.

Note:	The contacts directory is only available to agents with privileges as defined by your system administrator.

To make an internal call:

- In the Dialer field on the toolbar, enter the phone number or select a recent number from the drop-down list
  or

  Click the dial pad, enter the number and click OK.
  or

  Click the directory, and search the contact list. For instructions, refer to Searching the Dial List.

The call status changes to *Dialing*. When the recipient answers the call status changes to *Internal Call*.

Putting a Call on Hold

Put a call on hold while you search for additional information or review a customer conversation history.

To speak to another agent or supervisor while on a call, make a Warm Transfer or a Conference call. For details, see Transferring a Call or Making a Conference Call.

To hold or unhold a call:

1. In the active call window, click *Hold* in the action bar .
   The active call is placed on hold and the status area displays "In Hold". In the Action bar, the Hold icon changes to Off Hold.
2. Click *Off Hold* to activate the call.
   The status area displays *In Call*.

Transferring a Call

WorkSpace supports multiple call transfer options and provides easy access to phone directories. For example, you can transfer a call to another agent, forward it to a supervisor, or transfer it to a call queue. Information about the customer is transferred along with the call to ensure that customers do not need to repeat information. Use the Dial List to select the new recipient or enter an internal phone number in the dial pad.

After a call has been transferred, it can be returned to the original agent.

Note:	The Dial List is only available to agents with privileges as defined by your system administrator. If the Dial List is not available, when you select the type of conference call the dial pad opens instead.

WorkSpace distinguishes between these types of call transfers:

Warm Transfer

The impending transfer is announced to a specific recipient/extension while the caller is put on hold. The call is transferred only once the new recipient accepts the call and you end the call. Alternatively, you can consult with the new recipient and then return to the caller without transferring the call.

Cold Transfer

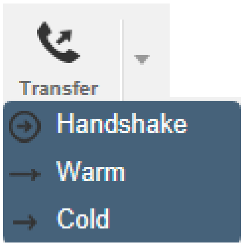
The call is either redirected to a call queue or transferred to a specific destination without confirming with the call recipient.

Handshake

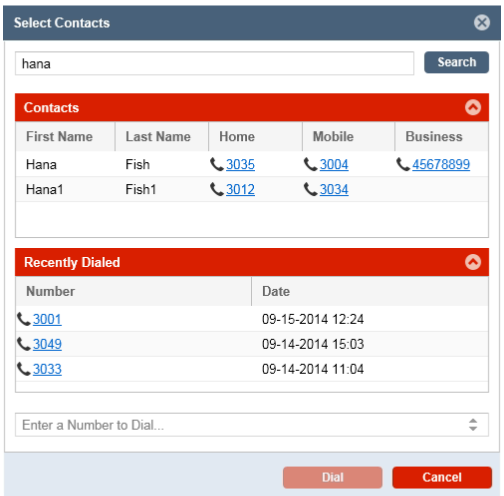
The call is transferred only once there is a connection. Otherwise, the call returns to you.

To make a warm call transfer:

1. In the Call screen, click *Transfer* on the action bar, and select *Warm*.



   The call status changes to "Transferring" and the customer is put on hold. The *Dial List* window opens.



2. Enter a number to dial, or search for a contact and click *Dial*. For details, see Searching the Dial List.
   When the call is answered, inform the recipient of the pending transfer. If the call is accepted,

complete the transfer.

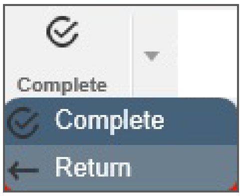
If the recipient does not answer or accept the call, return the call. Refer to To Return a Warm Transfer.

3. On the toolbar, click *Complete* and select *Complete* from the list.
   The call is transferred and your call status changes to "In Call Wrap Up".
4. Enter a call summary in the *Disposition Notes*.
5. *Close* the Call.
   The call editor closes.

To return a warm transfer:

If you do not wish to complete a warm transfer, return the call:

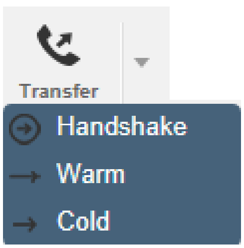
- In the Call editor, click the arrow next to *Complete* on the action bar, and select *Return*.



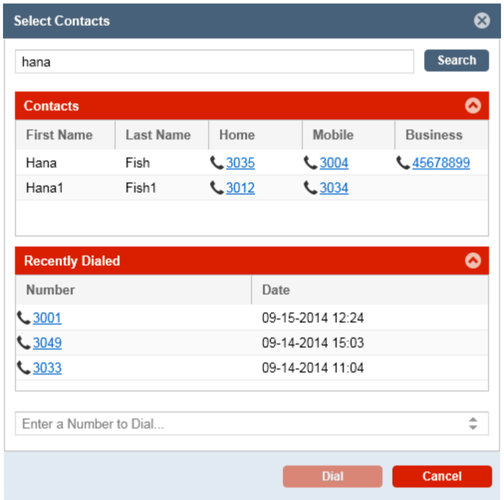
The call returns to you and the caller is no longer on hold.

To make a cold call transfer:

1. In the Call editor, click *Transfer* on the action bar, and select *Cold*.



The Dial List opens.

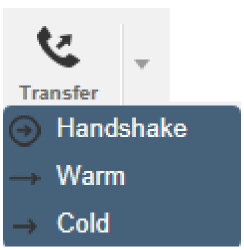


2. Enter a number to dial, or search for a contact and click *Dial*. For details, see Searching the Dial List.
   The call is transferred automatically to the new number and you are disconnected from the caller.

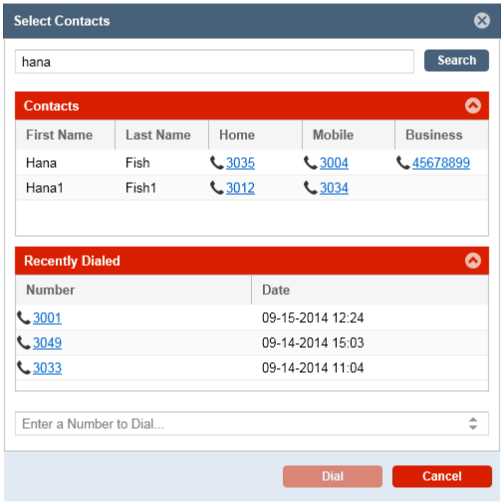
   The call status changes to "In Call Wrap Up".
3. Enter a call summary in the *Disposition Notes*.
4. *Close* the call.
   The call editor closes.

To make a handshake transfer:

1. In the Call editor, click *Transfer* on the action bar, and select *Handshake*.



The Dial List opens.



2. Enter a number to dial, or search for a contact and click *Dial*. For details, see Searching the Dial List.
   When there is a connection, the customer is transferred to the new recipient and the call status changes to "In Call Wrap Up".

   If there is no connection, the call returns to you automatically.
3. Once the call has transferred, enter a call summary in the *Disposition Notes*.
4. *Close* the call.
   The call editor closes.

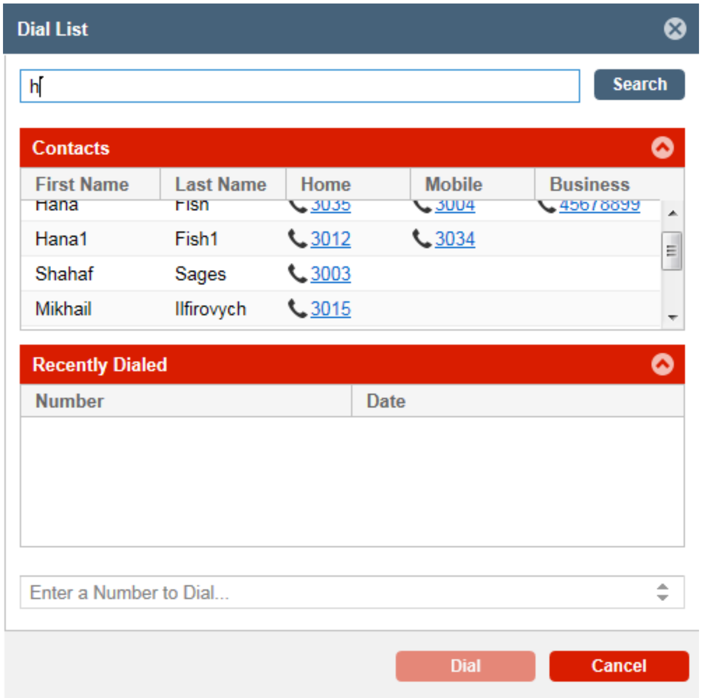
Making a Conference Call

Jacada WorkSpace supports 3-person conference calling. Once you are on a call with a customer, you may create a conference call to involve an internal third party, such as a supervisor, by selecting the third-party number from the Dial List. The conference call ends when the supervisor ends the call, and you return to a 2-person conversation.

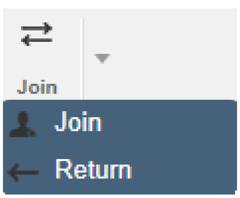
Note: The dial list is only available to agents with privileges as defined by your system administrator. If it is not available, the dial pad opens.

To make a conference call:

1. In the active call screen, click *Conf* on the action bar. The *Dial List* window opens.



2. Enter a number to dial, or search for a contact and click *Dial*. For details, see [Searching the Dial List](#).
   When the new recipient answers the call, the call status changes to "In Consultation" and the *Join* icon appears on the action bar.
3. On the action bar, click *Join,* or click the arrow next to *Join* and select *Join* from the list.



The call becomes a 3-way conference and the call status changes to *In Conference*.

- If you do not want the third party to join the call, click the arrow next to *Join* and select *Return* from the list. The call remains a 2-party conversation.

4. To end the call click *End*. The call status changes to *In Call Wrap Up*.
5. Enter the call summary in the *Disposition Notes*.
6. Click *Close* to close the call.

Searching the Dial List

WorkSpace enables you to select call recipients from a database of contacts when you are making an internal call, transferring a call, or creating a conference call. Dial the number directly or use the contacts directory on the toolbar to search for an internal company contact.

The dialer options appear on the toolbar and include a dial field, dial pad, and a dial list of contacts. The dial field lists recently dialed numbers.

The *Dial Pad* enables you to manually dial a number.

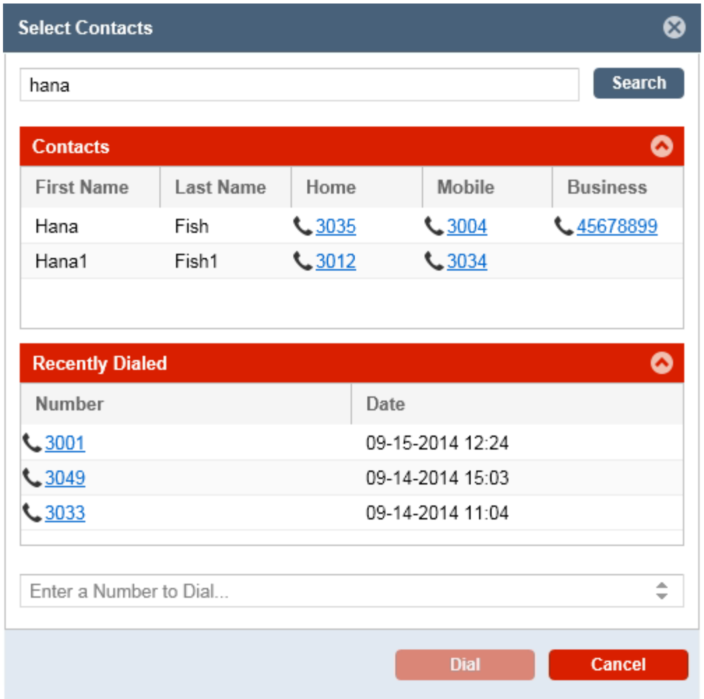
Note: The Dial List is only available to agents with privileges as defined by your system administrator. Some agents may only see the dial field and dial pad.

The following table describes the *Dial List* window.

Field	Description
Search field	Enter search criteria and click the *Search* button.
Contacts	Displays a list of contacts by First Name, Last Name, Home number, Mobile number, and Business number. Double-click the number or select and click Dial.
Recently Dialed	Displays a list of recently dialed contacts by Number and Date of call. Double-click the number or select and click *Dial*.
Dialer	Manually enter a number to dial.
Dial Button	Click to activate the call.

To search the dial list:

1. Click the *Dial List* in the *Dialer* toolbar. The *Dial List* window opens.



2. Enter a name in the search field and click *Search*,
   or
   Select a contact from the *Contacts* list or *Recently Dialed* list,
   or
   Enter a number to dial in the Dial field.
3. Click *Dial*. The call is initiated.

Using the Dial Pad

The Dial Pad appears on the toolbar in the Dialer area. It displays numbers for manually entering an internal phone number.

To use the dial pad:

1. In the toolbar, click the *Dial Pad* icon . The *Dial Pad* opens.

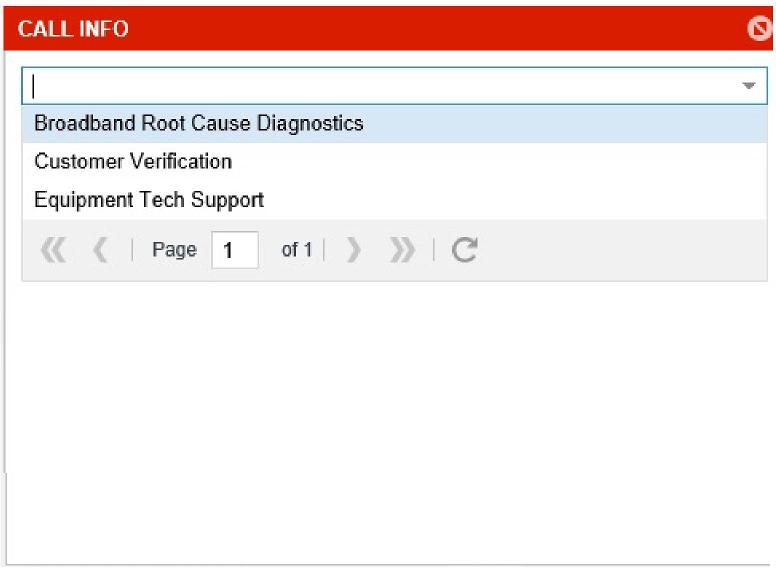
2. Press the phone numbers on the dial pad and click *OK*. The call is initiated.

Using Call Scripts

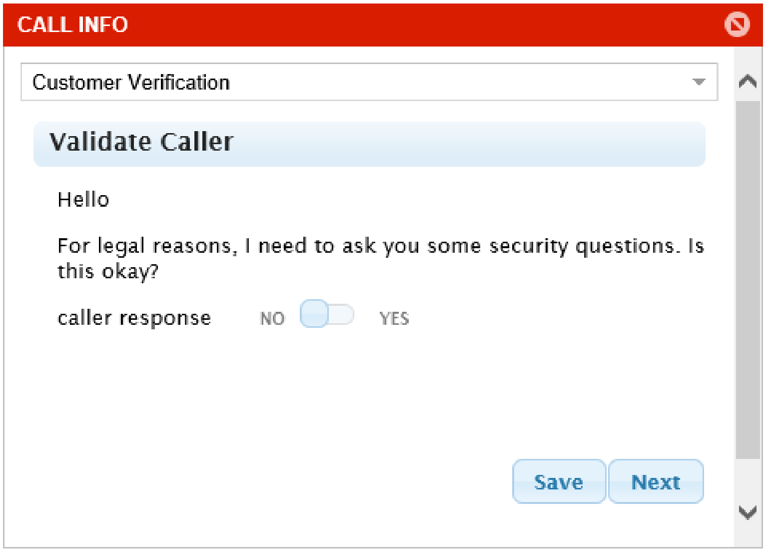
Call scripts are customized tools created to help guide you through customer calls. The Call Info area of the call conversation screen displays a drop-down list of all available call scripts.

To use call scripts:

1. In the *Call Info* area, click the drop-down arrow and select a script from the list. The selected script opens.



2. Follow the instructions on the script.



3. When you have finished, close the script.

Note:	Refer to your system administrator for instructions on using organization specific call scripts.

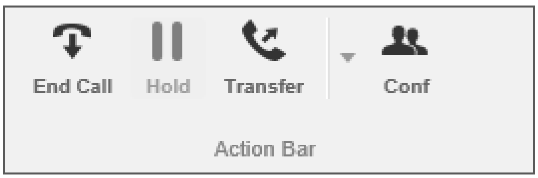
Completing a Call

There are two stages to completing a call. First, you must *End* the call. Then you must *Close* it. The End call and Close icons appear in the action bar when you are in call context.

Icon	Description
	**End Call** - Ends the voice conversation but keeps the call screen open on your desktop. Your call status changes to "In Call Wrap Up".
	**Close Call** - Closes the call screen. This icon is only available after you end the call.

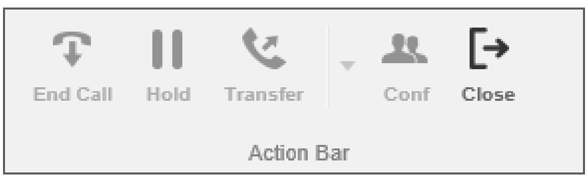
To end a call:

- Click **End Call** in the action bar. The call ends but the call screen remains the open you that you can complete disposition notes.



To complete a call:

- Click **Close** in the action bar. The call screen closes.



6

Managing Email Conversations

Jacada WorkSpace integrates desktop email for easy email communication. For an overview of the email interface, refer to Email Context.

WorkSpace supports the following email tasks:

- Receiving an Email
- Replying to an Email
- Forwarding an Email
- Using Text Templates
- Opening an Attachment
- Adding an Attachment
- Creating Disposition Notes
- Closing an Email Conversation
- Opening an Email from History

Receiving an Email

You can receive new email messages once you have logged in and changed your status to *Ready*. Since WorkSpace supports multi-tasking, you may receive email when you have other voice, email, or chat conversations open. When a new email arrives, a pop-up notification appears in the lower right screen and the New Email notification flashes on the toolbar.

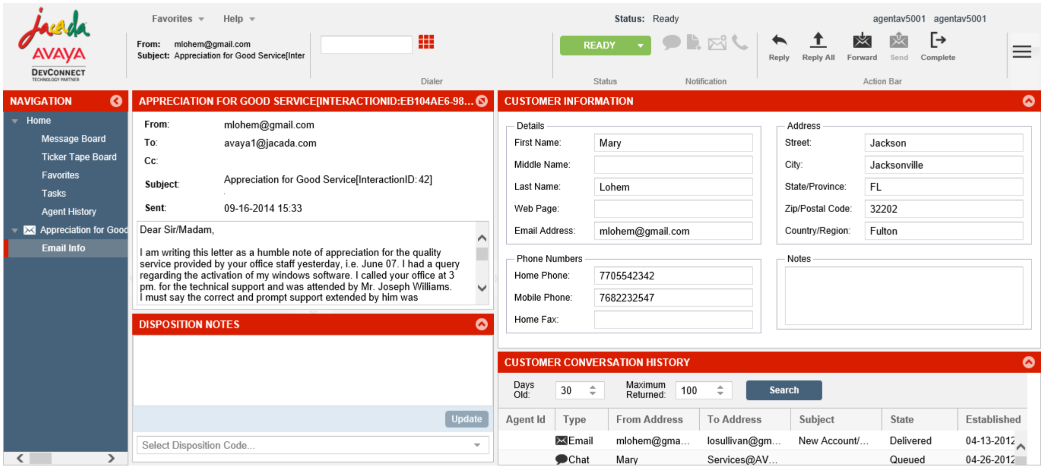
To receive an email:

1. Click on the flashing *New Email Notification* on the action bar or on the email pop-up notification in the lower right screen.

The email conversation screen opens. In the toolbar, the customer info area displays the incoming email address and subject. The action bar displays the email icons.

The incoming email appears in the email editor in the top left area of the screen. The email header contains the customer and recipient addresses, subject, and date. The email body appears below the header. To view the email content, use the scroll bar to scroll up or down.

In addition to the email itself, the screen displays Disposition Notes, Customer Information, and Customer Conversation History.


Favorites
Help
Status: Ready
agentav5001 agentav5001
From: mlohem@gmail.com
Subject: Appreciation for Good Service[Inter
READY
Reply
Reply All
Forward
Send
Complete
Dialer
Status
Notification
Action Bar
NAVIGATION
Home
Message Board
Ticker Tape Board
Favorites
Tasks
Agent History
Appreciation for Good
Email Info
APPRECIATION FOR GOOD SERVICE[INTERACTIONID:EB104AE6-98...
From: mlohem@gmail.com
To: avaya1@jacada.com
Cc:
Subject: Appreciation for Good Service[InteractionID: 42]
Sent: 09-16-2014 15:33
Dear Sir/Madam,
I am writing this letter as a humble note of appreciation for the quality service provided by your office staff yesterday, i.e. June 07. I had a query regarding the activation of my windows software. I called your office at 3 pm. for the technical support and was attended by Mr. Joseph Williams. I must say the correct and prompt support extended by him was
DISPOSITION NOTES
Update
Select Disposition Code...
CUSTOMER INFORMATION
Details
First Name: Mary
Middle Name:
Last Name: Lohem
Web Page:
Email Address: mlohem@gmail.com
Address
Street: Jackson
City: Jacksonville
State/Province: FL
Zip/Postal Code: 32202
Country/Region: Fulton
Phone Numbers
Home Phone: 7705542342
Mobile Phone: 7682232547
Home Fax:
Notes
CUSTOMER CONVERSATION HISTORY
Days Old: 30
Maximum Returned: 100
Search
Agent Id | Type | From Address | To Address | Subject | State | Established
Email | mlohem@gma... | losullivan@gm... | New Account/... | Delivered | 04-13-2012
Chat | Mary | Services@AV... | Queued | 04-26-2012

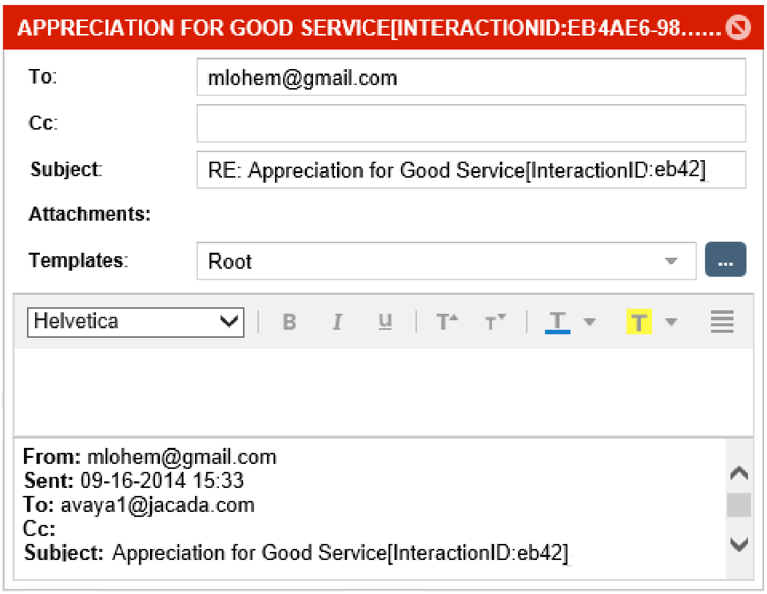
Replying to an Email

When you reply to an email in WorkSpace, the original content of the incoming email is included in the reply. You can choose to send the reply only to the original sender, to all the email recipients, or to any additional recipients.

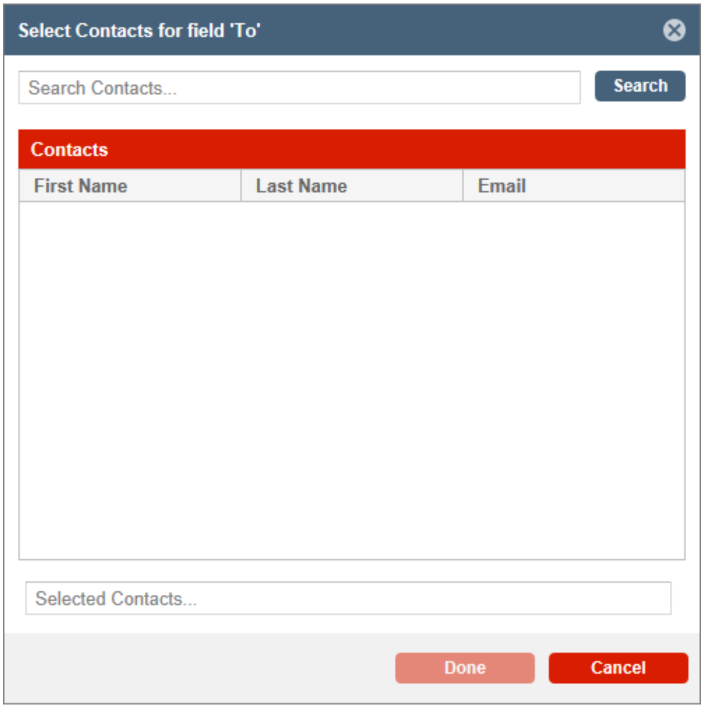
- **Reply** - Sends the reply to the original sender's email only
- **Reply All** - Sends the reply to the sender and all the original email recipients

To reply to an email:

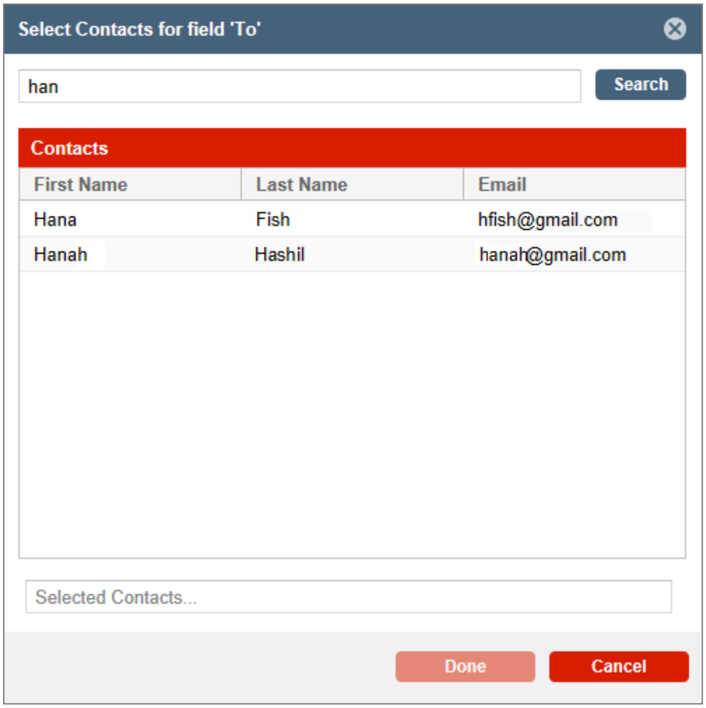
1. In the open email window, click *Reply* or *Reply All* on the action bar.
   The Reply email editor opens, automatically displaying the email address and subject.



2. To add a recipient, enter the recipient email address in the *To* or *CC* field, or click *To* or *CC* to open the *Select Contacts* window.

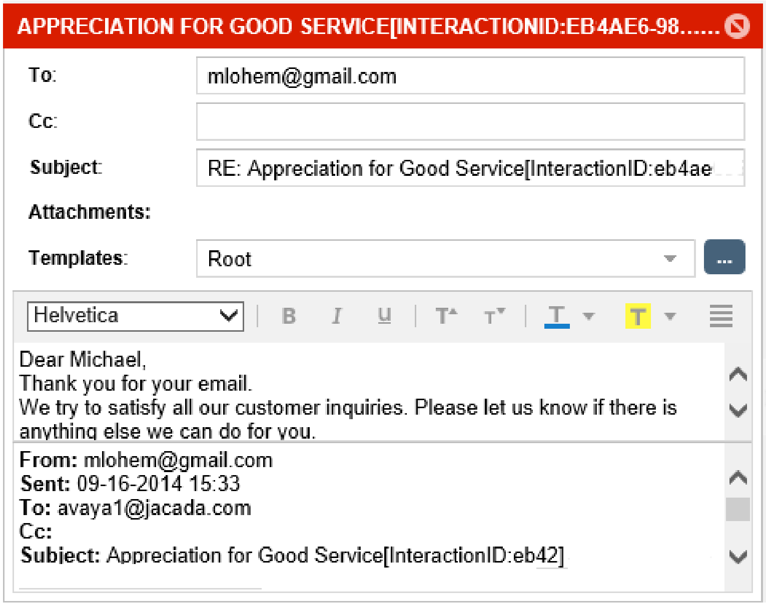


- In the *Select Contacts* window, enter the contact name and click *Search* to view a list of relevant contacts.



- Select the required contact from the list and click *Done*.

3. In the email reply editor, enter your reply. The original email content appears below the text reply.



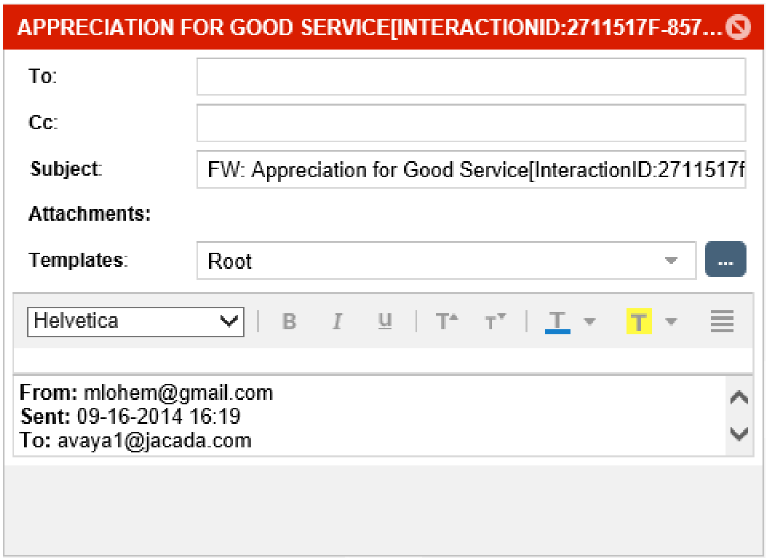
4. To insert auto-text, refer to Using Text Templates.
5. To add an attachment, refer to Adding an Attachment.
6. Click *Send* on the action bar. The email is sent and the email conversation closes.

Forwarding an Email

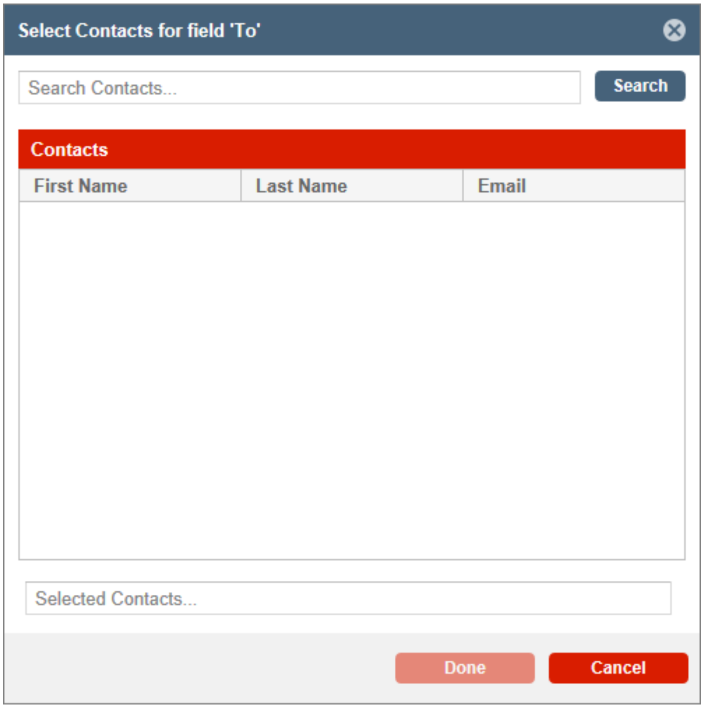
Use the Forward command to send an incoming email to a third party recipient. You may insert any email recipient or select from a recipient list.

To forward an email:

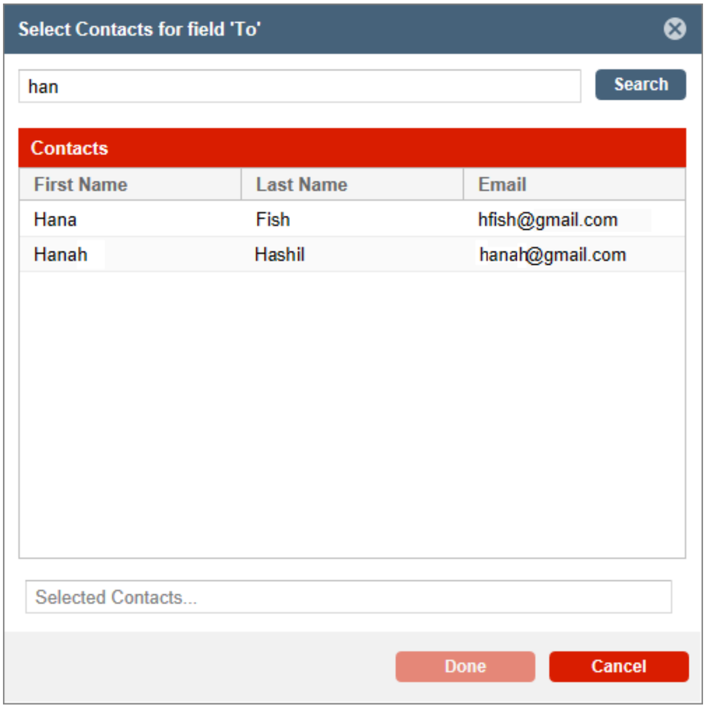
1. In the open email window, click *Forward* on the action bar. The Forward email editor opens.



2. Enter one or more recipients in the *To* field, or click *To* to open the *Select Contacts* window.

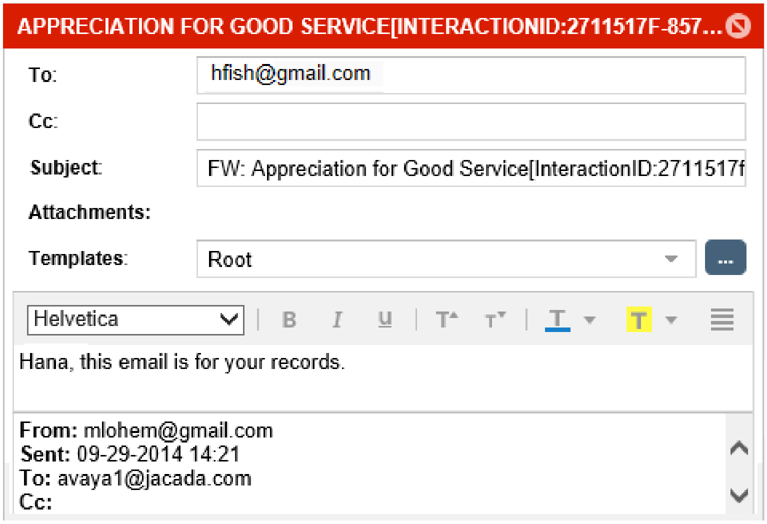


- In the *Select Contacts* window, enter the contact name and click *Search* to view a list of relevant contacts.



- Select the required contact from the list and click *Done*.

3. Add CC recipients as necessary, using the above procedure.
4. In the forward email editor, enter your email message.



5. To insert auto-text, refer to Using Text Templates.
6. To add an attachment, refer to Adding an Attachment.
7. Click *Send*. The email is forwarded and the conversation closes.

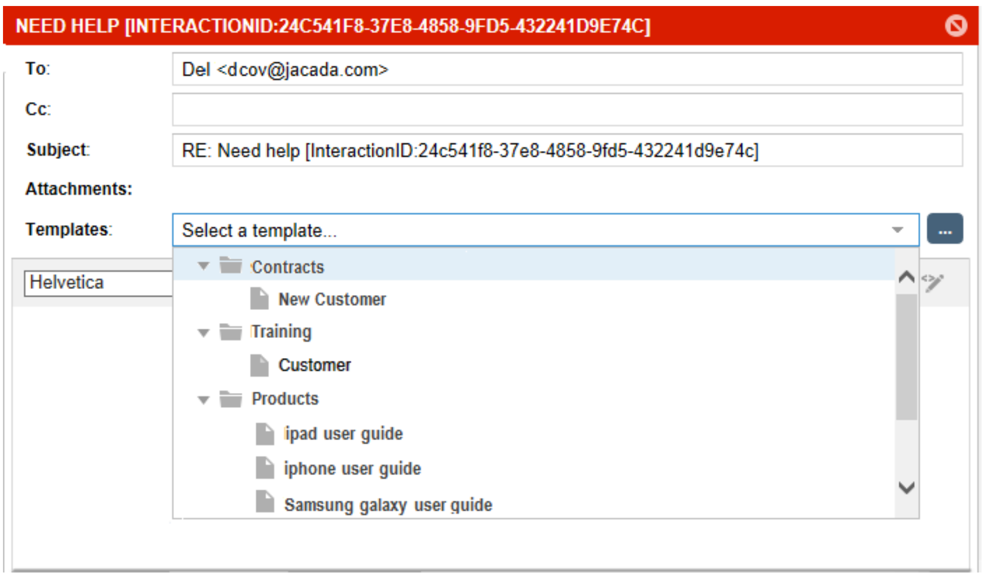
Using Text Templates

Templates are pre-written texts that can be inserted into your reply or forward emails. Templates are customized for your organization. Refer to your system administrator for details about how your organization uses templates.

Note that templates can also include attachments.

To insert a text template:

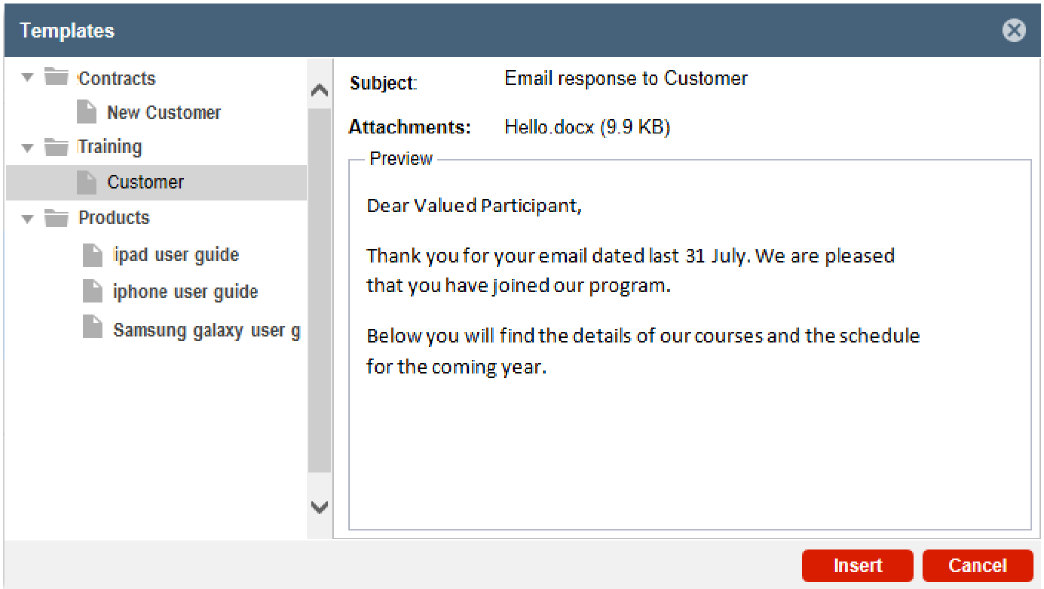
- In the email editor, click the *Templates* arrow and select a template from the drop-down list.



The template text is inserted into your reply or forwarding email.

To preview a template:

1. In the email editor, click the template browse button. The *Templates* window opens.



2. From the left side, select a template from the list.
   The content appears in the details area to the right.

3. Click *Insert*.
   The template is inserted into the email and the Template window closes.

Opening an Attachment

You can open attachments sent with incoming email.

To open an attachment:

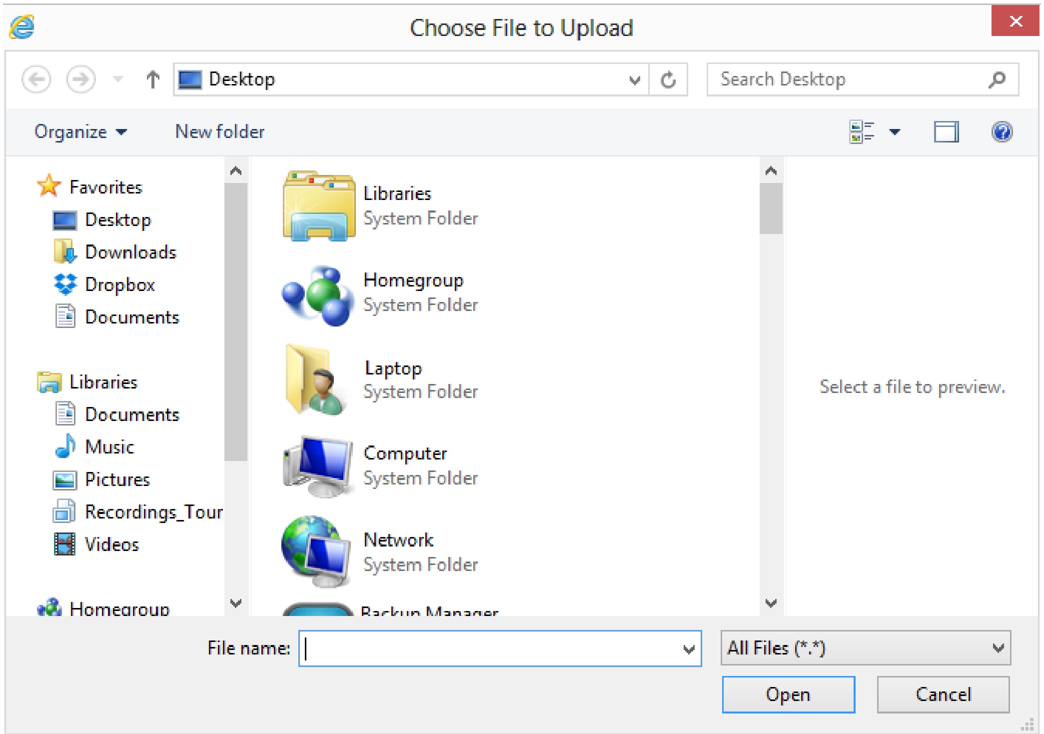
- In the open email editor, click the attachment name.
  The link opens the attachment to a pre-defined location or will prompt you for a location to Save the file.

Adding an Attachment

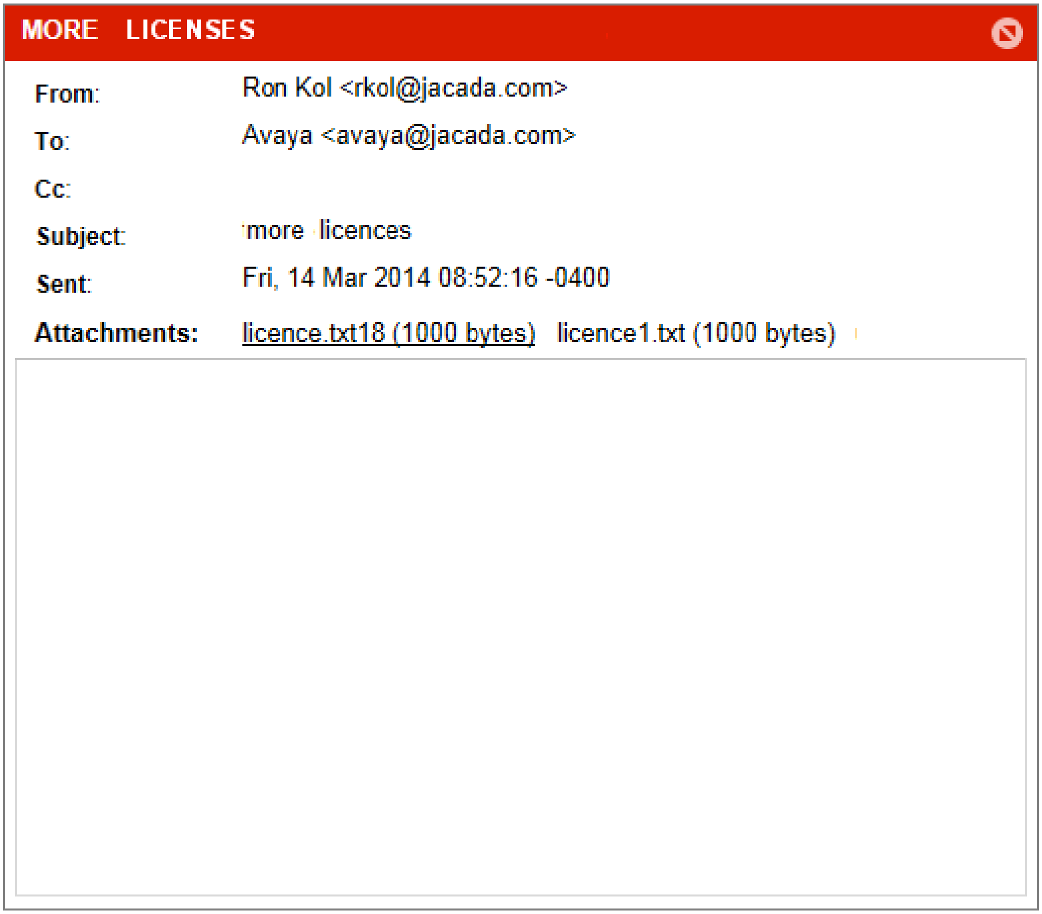
Use the Attachment feature to send documents with your outgoing email. WorkSpace supports attaching files up to 20 MB.

To add an attachment:

1. In the email editor header, click *Attachment*. The *Choose File to Upload* window opens.

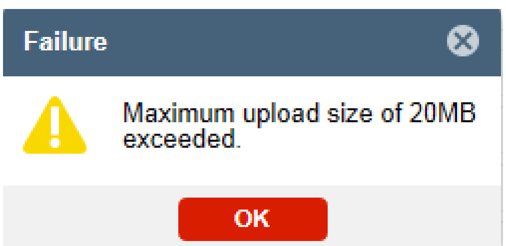


2. Select one or more files and click *OK*.
   The file loads displaying the file name in the *Attachment* field.



If the file is too large, an error message appears.

- Click *OK* and select a different file.



3. Continue to write the email and then click *Send*.
   The email closes.

Closing an Email Conversation

An email conversation is active if you are viewing an incoming email, creating a new email, replying to an email, or forwarding an email. When you send the email, the email conversation is completed and the email conversation screen automatically closes.

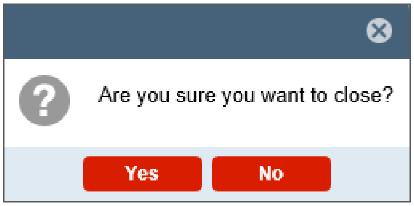
Email conversations may stay active even if you are answering a call or responding to a chat message.

You can manually control closing an email, as follows:

- **Close** - closes a reply or forward email without sending, and returns to the incoming email
- **Complete** - closes the email conversation which is then considered as handled.

To close an email:

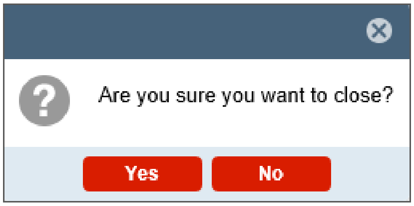
1. In an open reply or forward email, click *Close* in the Action bar and select *Close*. A confirmation message appears.



2. Click *Yes*. The reply or forward email closes and the original email is displayed.

To complete an email:

1. When viewing an open incoming email, click *Complete* in the Action bar. When viewing a reply or forward email, click *Close* in the Action bar and select *Complete* from the list.
   A confirmation message appears.



2. Click *Yes* to complete the correspondence. The email conversation closes.

Opening an Email from History

Once an email conversation is completed, it is recorded in both the agent's history and in the customer's history records.

You can view a completed email conversation from your Agent History according to the unique ID of the contact agent. Alternatively, you can view a completed email from the Customer Conversation History when you are in an active call, chat or email conversation with the customer.

7

Managing Chat Conversations

Jacada WorkSpace supports live chat conversations with customers or other agents in your organization. or an overview of the chat interface, refer to Chat Context.

WorkSpace supports the following chat tasks:

- Receiving and Replying to Chat
- Using Canned Responses
- Completing Chat
- Creating Disposition Notes

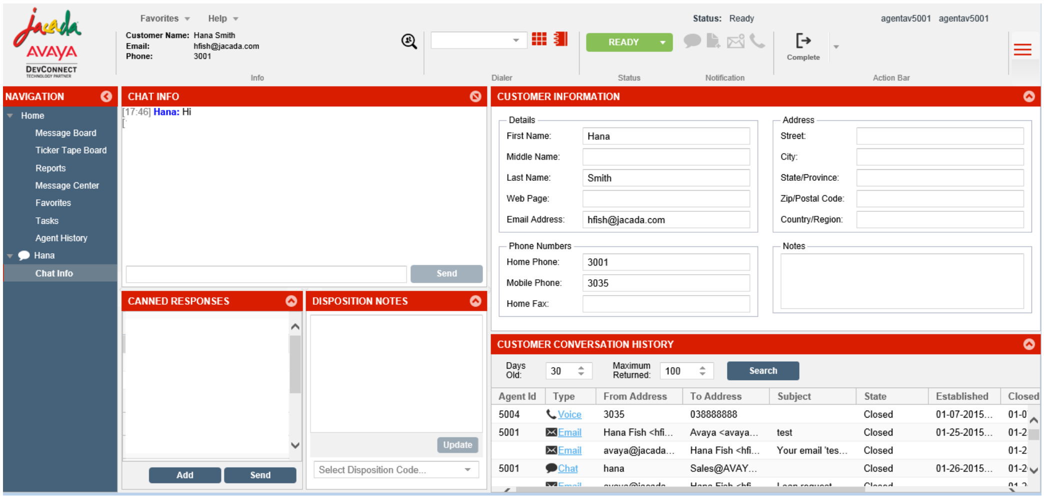
Receiving and Replying to Chat

You can receive new chat messages once you have logged in and changed your status to *Ready*.

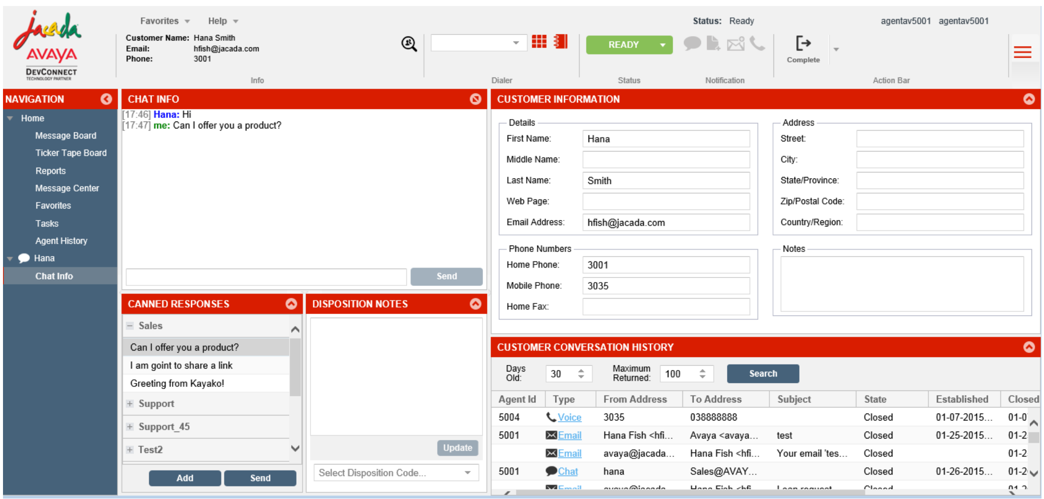
When a new chat conversation arrives, a pop-up notification appears in the lower right corner and the New Chat notification flashes on the toolbar. You can address an incoming chat even if you are currently working in another context (email, voice) according to your organization's procedures.

To receive a chat message:

1. Click on the flashing *New Chat* notification icon on the action bar or on the Chat pop-up notification in the lower right screen.
   The incoming chat appears in the top left area of the screen. In the toolbar, the customer info area displays the customer name and the date and the action bar displays the chat icons. In addition to the chat conversation area, the screen displays Canned Responses, Disposition Notes, Customer Information and Customer Conversation History.



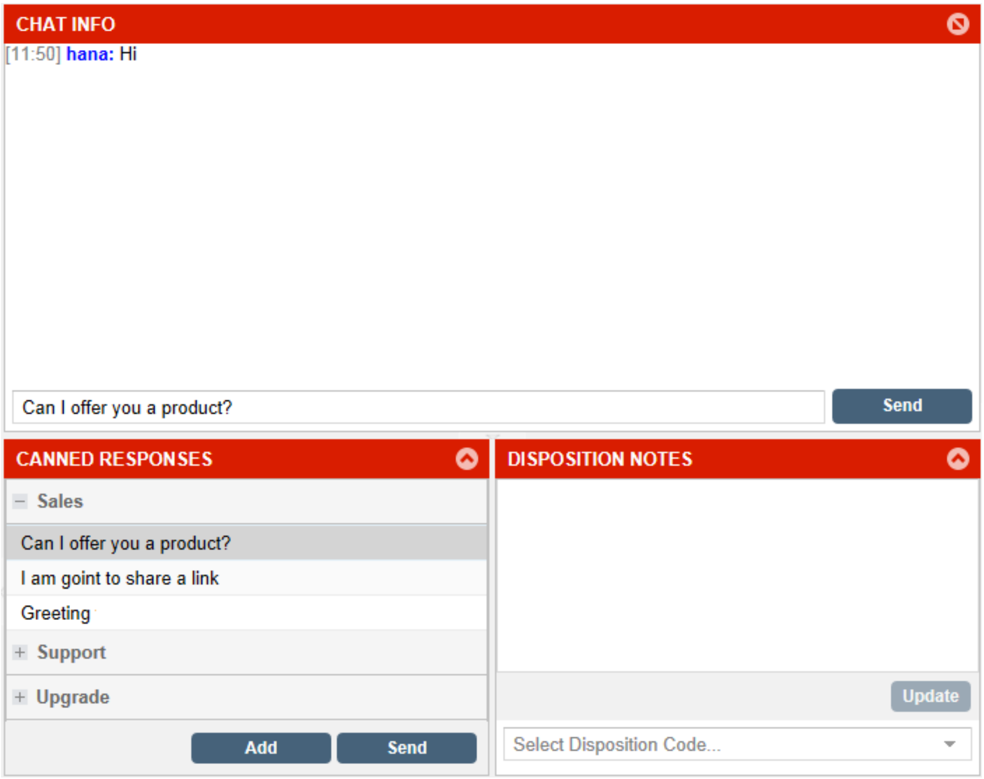
2. Enter your text in the response field and click *Send*. Your response appears below the customer text.



3. Add Canned Responses if required.
4. Complete the conversation.

Using Canned Responses

To save you time and enhance accuracy, your organization may create customized canned responses for use in Chat messages. Select and insert canned responses instead of typing the text. Canned responses are also referred to as auto-text.



To insert auto-text in chat:

1. In the open Chat session, select text to insert from the *Canned Responses* area:

   - Double-click the text.
     or
   - Select the text and click *Add*.
     The auto-text appears in the response field.

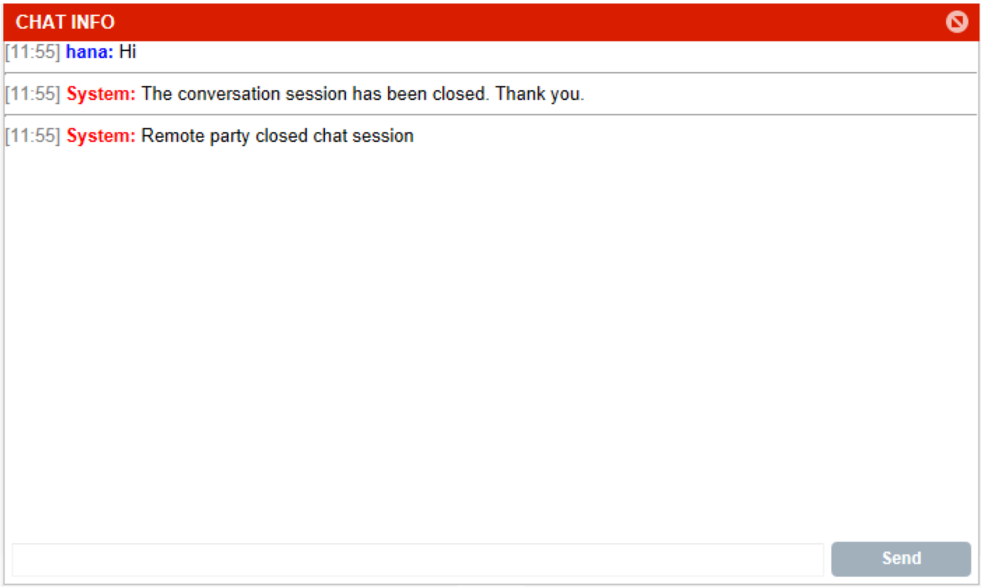
2. Complete the chat message, and click *Send* from the Chat area.

Note:	You may also select the auto-text and click *Send* from the Canned Response area. However, the text appears automatically in the chat message and will be visible to the customer immediately. This method is quicker but caution is recommended.

Completing Chat

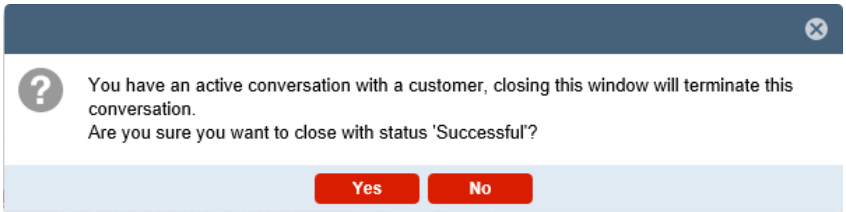
Chat conversations may be concluded by the sender or by the agent.

When the sender ends the chat session, a message appears in your chat editor, as in the figure, below.



To complete a chat conversation:

1. When your conversation is over, click *Complete* on the toolbar to mark the conversation as successful. A confirmation message appears.
   Click *Yes*. The chat editor closes.



   or, use the next step if the conversation was not successful.

2. If the conversation was unsuccessful, click the *Complete* arrow and select *Failed*. A confirmation message appears.
   Click Yes. The *Chat* editor closes and the message status remains "Pending".