



Working with Agent Desktop



Attention

As part of our efforts to improve your experience we are bringing in new Webex Contact Center digital channels. The social channels - Facebook Messenger and SMS will be temporarily unavailable. You can continue using the Chat and Email services.

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Sign In to the Agent Desktop

To sign in to the Agent Desktop:

Before you begin

Ensure that your phone is ready to receive calls.

Procedure

Step 1 In the address bar of your browser, enter the URL provided by your administrator.

Step 2 Enter your username and click **Next**.

Note To change the selected email address, press Alt + Left arrow (Windows) or Command + Left arrow (Mac) keyboard shortcuts.

Step 3 Enter your password and click **Sign In**.
The **Station Login** dialog box appears.

Step 4 Enter a **Dial Number** to be used for inbound and outbound calls. Choose the dial number format from the following:

- Select **US Format** if your phone number is in the following format: dialing prefix + area code + 7-digit number (For example, +1 (800) 553-2447).
- Select **Other** if your phone number is in any other format.

- Note**
- The format of your phone number depends on your location. Check with your administrator for details of the format setting.
 - If you copy a number with any special characters such as !, @, #, \$, %, ^, &, *,), (, =, ., <, >, {, }, [,], :, ;, ', ", |, ~, ` , _ and -, to the **Dial Number** text box, the special characters are removed before you submit the Station Login details. The only supported special character is +.

Step 5 (Optional) If you are using a Webex Calling device, select the **Extension** tab and enter the Webex Calling extension that is configured by your administrator.

- Note**
- If you copy a number with any special characters such as !, @, #, \$, %, ^, &, *,), (, =, ., <, >, {, }, [,], :, ;, ', ", |, ~, ` , _ and -, to the **Extension** text box, the special characters are removed before you submit the Station Login details. The only supported special character is +.

- Note** The **Station Login** dialog box supports the browser autocomplete feature. Autocomplete saves your time by automatically filling in previously entered dial number(s) and extension number(s). The number of suggestions provided in autocomplete is specific to the browser. To remove the saved entries, you must clear the browser cache. The autocomplete feature is not supported in private browsing mode.

Step 6 Select your team from the **Team** drop-down list.

- Note** You can either select the team from the drop-down list or use the search field to filter the list.

Step 7 Click **Submit**.

- Note** To retrieve a forgotten password, click **Forgot Password**, and enter the six-digit confirmation code sent to your email address.

Attention You are not allowed to access the Agent Desktop from multiple browsers or multiple tabs of the same browser window. If you have signed in to multiple instances of the Agent Desktop, and if you switch between browsers or tabs to access the Agent Desktop, a prompt message is displayed. When you click **Continue** in the prompt message, you will be signed in to the Agent Desktop in that browser window.

If you click **Continue** while you are on a call, the Interaction Control pane takes 4 to 5 seconds to load.

- Note** You may not be able to sign in to the Agent Desktop:
- If the Dial Number is invalid, not registered, or already used by another user.
 - If the tenant, profile, skill, or agent permissions and settings are not configured.
 - If there are issues with the network or API (Application Programming Interface).

Contact your administrator to resolve any sign-in related issues.

Responsiveness

Agent Desktop supports a responsive view that enables easy reading and navigation across small (< 640 pixels), medium (641 to 1007 pixels), and large (> 1008 pixels) screen resolutions. The recommended display size for using the Agent Desktop is 500 x 400 pixels (width x height) or higher.

Based on the progressive screen sizes, orientation, and viewing areas of the device being used, the Agent Desktop interface adjusts automatically. Agent Desktop is responsive in supported browser versions, irrespective of the device used to access the Agent Desktop. For example, Agent Desktop works similarly on a mobile phone, tablet, laptop, or an iPad if you access Agent Desktop using Google Chrome (V76.0.3809 or later). For more information on supported browser versions, see [Agent Desktop Requirements](#).


The Agent Desktop demonstrates responsive behavior as follows:

- **Horizontal Header**—If there are more custom widgets or icons on the horizontal header, the **More** (⋮) icon appears.
 - When you click the icon, the drop-down list displays the custom widgets and icons.
 - When you resize the screen, the custom widgets and icons are displayed on the horizontal header as expected, without the ⋮ icon.
- **Navigation Bar**—The left navigation bar will be collapsed into the horizontal header in small viewing areas. When you click the **Menu** (☰) icon, the sliding bar appears along with the icons.



Note The title and logo are not displayed when the viewing area is less than 736 pixels wide. Increase the width to 737 pixels or more to view the logo and the title.

- **Task List, Agent Interaction History, and Auxiliary Information** panes—The panes will be overlaid on the Workspace. By default, the panes will be in the collapsed state in small viewing areas.

When you click the  (expand) icon of each pane, the sliding pane displays the details. When you expand one pane, other expanded panes are collapsed, so that the workspace is not hidden.

In the Auxiliary Information pane, the **More** option appears if there are additional tabs to be displayed in the view.

The Agent Desktop can be installed as an application. The responsive behavior here is the same as in the browser-based Agent Desktop.



Note

- Your administrator defines whether a custom widget is responsive or not.
 - Non-responsive widgets cannot ensure the best user experience and are not displayed when the viewing area is less than 736 pixels wide. Increase the width to 737 pixels or more to view any widgets configured as non-responsive.
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Install the Agent Desktop Application

You can install the Agent Desktop as an application if the Agent Desktop is accessed using a modern web browser that supports Progressive Web Application (PWA).

PWAs are web applications that take advantage of the latest technologies to combine the best of web and mobile applications. Think of them as websites built using web technologies, but act and feel like applications.

The Operating Systems and browsers that support the Agent Desktop as an application are:

- Operating Systems—Windows 10, macOS, and Chrome OS
- Web Browsers—Google Chrome and Edge Chromium (MS Edge)

To install the Agent Desktop as an application:

Before you begin

- You must be signed in to the Agent Desktop. For more information, see [Sign In to the Agent Desktop](#).
- You must use a modern web browser that supports PWA, such as Google Chrome and Edge Chromium (MS Edge).

Procedure

Step 1 Click the **Install Application** link displayed in the notification message, or the **Install Webex CC Desktop** icon displayed on the address bar.

Step 2 Click **Install**.

When installed, the Agent Desktop opens in an individual application window and can be used as a separate desktop application. You can add the application to your Home screen or pin it to your taskbar for easy access.

- Note**
- When you sign in to the Agent Desktop or clear the cache, you are notified with an option to install the Agent Desktop as a desktop application.
 - You cannot install the Agent Desktop as a desktop application using the Firefox web browser.
 - When you access the Agent Desktop either from the web browser or as an application, the user experience (UX) remains unchanged, except that the address bar is not part of the desktop application.
 - To uninstall the Agent Desktop application:
 - Click the ellipsis icon on the application title bar.
 - Click **Uninstall Webex CC Desktop > Remove**.
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Change the Availability State

When you sign in to the Agent Desktop, your state is set to the default idle state (reason) configured by your administrator. To accept any call, chat, email, or social messaging conversation requests, you must set your state to **Available**.

To change your default state:

Before you begin

You must be signed in to the Agent Desktop. For more information, see [Sign In to the Agent Desktop](#).

Procedure

- Step 1** Click the **Availability State** drop-down list that is displayed on the horizontal header.
- Step 2** Select the required availability state from the drop-down list or use the search field to filter the list. The drop-down list displays the **Available** state, and the idle states configured by your administrator.
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Apply Wrap Up Reason

Wrap up reason indicates why a customer called the contact center, and records your experience assisting the customer to resolve the queries. Your enterprise uses this information to measure the effectiveness and success of the contact center.

Wrap up reason is applied after you end your interactions with the customers. You must select a wrap up reason in the following scenarios:

- When you end an active voice call with a customer.
- When you end an active chat or social messaging conversation with a customer.
- When you transfer an active voice call, chat, email, or social messaging conversation request.
- When you send an email reply to a customer.
- When the customer ends an active voice call, or chat request.

Before you begin

To apply a wrap-up reason, you must have an active interaction with a customer.

Procedure

- Step 1** Click **End** or **Transfer** or **Send** based on your scenario. The **Wrap Up Reasons** dialog box appears.

The timer, and the wrap up reasons that appear in the **Wrap Up Reasons** dialog box are configured by your administrator.

Step 2 (Optional) Click **Cancel Auto Wrap Up** to prevent the desktop from wrapping up automatically.

Step 3 You can either select the required reason from the drop-down list or use the search field to filter the list. You can select only one wrap up reason at a time.

- Note**
- The count up timer appears next to the **Wrap Up** state indicating the time that has elapsed since you ended the interaction.
 - The count down timer appears on the **Wrap Up Reasons** dialog box indicating the time that is left before the interaction is auto wrapped up. If you do not select a wrap up reason before the timer reaches zero, the default wrap up reason is submitted during auto wrap up.

Step 4 Click **Submit Wrap Up**.

Resolve Desktop Issues

When there is an API request failure or event failure to load data on the desktop, you are notified with an error message. You can copy the tracking ID of the error and share the details with your administrator to debug the issue.



Note If you experience problems with the desktop, you can send the desktop logs to your administrator for investigating the issue. For more information, see [Download Error Report, on page 11](#).

Procedure

Step 1 Click the **Error Details** link in the error dialog box.

Step 2 Click **Copy Tracking ID**.
Share the copied tracking ID with your administrator to debug the issue.

User Profile

The **User Profile** icon is displayed at the top-right corner of your desktop. When you click the **User Profile** icon, the following information is displayed:

- The profile picture, username, team, and phone number which you used to sign in. You can change your team when you have no active contact requests or conversations. For more information, see [Change Your Team, on page 7](#).

**Note**

- If your profile picture is not configured, the initials are displayed based on the first name and last name. You can configure your profile picture while activating your account or later on your [Cisco Webex profile page](#). For more information see, [Add Your Profile Picture](#).
- Phone Number displays either the **Dial Number** or **Extension** value as entered in the **Station Login** dialog box.

- **Channel Capacity**—The number of contacts that you can handle on each media channel at a given time. For more information, see [View Channel Capacity, on page 8](#).
- **User Settings**—The following options appear in the **User Settings** section:
 - **Notification Settings**—Settings to display the desktop notifications and alerts. For more information, see [Enable or Disable Notification Settings, on page 9](#).
 - **Reset Entire Desktop Layout**—The option to restore the default desktop layout view configured by your administrator. For more information, see [Reset Desktop Layout](#).
- **Switch to Dark Mode**—The toggle button to enable or disable the dark background theme of the desktop. The dark mode selection is retained until you clear the browser cache.
- **Help**—The following options appear in the **Help** section:
 - **Keyboard Shortcuts**—The option to access the keyboard shortcut list. For more information, see [Access Keyboard Shortcuts](#).
 - **Download Error Report**—The option to download error reports. For more information, see [Download Error Report, on page 11](#).
- **Sign Out**—The option to sign out from the desktop. For more information, see [Sign Out from the Agent Desktop, on page 12](#).

Change Your Team

You can change your team when you have no active contact request or conversation.

Before you begin

- You must be signed in to the Agent Desktop. For more information, see [Sign In to the Agent Desktop](#).
- You must be associated with more than one team.

Procedure

Step 1 Click **User Profile** at the top-right corner of your desktop.

Note You cannot change your team if you have an active contact request or conversation. The **Team** option is disabled.

Step 2 Click **Team**.

The team names are listed in the alphabetical order. By default, your current team is selected.

Step 3 Select a team from the displayed list.

Note Use the search field to find the list.

Step 4 Click **Save Team Selection**.

Note The **Save Team Selection** is disabled when you are not associated with more than one team.

A prompt message appears to confirm the team change.

Step 5 Click **Change Team**.

A successful team change message is displayed. The desktop layout and the routing strategy (voice or digital channel) of the new team are applied.

- Note**
- You cannot change your team when you have an incoming request.
 - The desktop layout changes may load a few seconds later which is subject to network availability and other operational considerations. If the agent has accessed any page from the previous desktop layout that is not part of the new desktop layout, the page not found error message is displayed. Navigate to the Home page by clicking the **Go Home** link on the error page.
 - An error message is displayed if the team change was not successful. To debug the issue, share the tracking ID and details of the error with your administrator. For more information, see [Resolve Desktop Issues, on page 6](#).
 - If the system fails to sign in to the new team, you will be redirected to the **Station Login** dialog box. In the **Station Login** dialog box, select your team from the **Team** drop-down list. For more information, see [Sign In to the Agent Desktop, on page 1](#).

View Channel Capacity

Your administrator configures the number of contacts that you can handle on each media channel at a given time based on your multimedia profile, including the queue in the specific channel.

- To view the channel capacity, click **User Profile** on the top-right corner of your desktop.

The **Channel Capacity** section displays the routing type and the number of contacts that you can handle on each media channel.

The media channels include **Chat**, **Email**, **Voice**, and **Social**. For example, if the number is stated as 1 against the media channel badge **Voice** and 3 against **Chat**, then you are allowed to receive only one incoming voice call and three chat requests.



Note The media channel badges are highlighted only if the capacity is allocated. For example, consider that the number of contacts that you can handle for **Voice** is configured as 1 and for **Chat** as 0, then the media channel badge for **Voice** is highlighted, and for **Chat** is grayed out.

The following are the media details:

Routing Type	Details
Blended	Allows you to handle multiple contacts simultaneously across all channels. For example, Chat-2, Email-4, Voice-1, and Social-2.
Blended Real-time	Allows you to handle one mandatory real-time channel, either voice or chat, along with other configured channels. For example, Email-4, and Voice-1.
Exclusive	Allows you to handle only one contact at a given time. For example, Voice-1.

Enable or Disable Notification Settings





Notifications keep you in the loop by letting you know that something new has happened which may require your attention. The desktop notifications include alerts, new messages, state changes and so on. For more information, see [Desktop Notification](#).

To enable desktop notifications:

Before you begin

You must be signed in to the Agent Desktop. For more information, see [Sign In to the Agent Desktop](#).

Procedure

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- Step 1** Click **User Profile** at the right top corner of your desktop.
- Step 2** In the **User Settings** section, click **Notification Settings**.
- Step 3** Click the **Enable Notifications** toggle button to enable or disable the display of notifications on your desktop.
- Note**
- When you have enabled the notifications, the  (**Notification Center**) icon is displayed on the horizontal header.
 - By default, the **Enable Notifications** toggle button is enabled.
- Step 4** Click the **Enable Silent Notifications** toggle button to enable or disable the display of visual desktop alerts. When you enable silent notifications, the desktop alerts are delivered to the Notification Center. For more information, see [Access Notification Center, on page 10](#).
- Note** By default, the **Enable Silent Notifications** toggle button is disabled.
- Step 5** Click the **Enable Sound Notifications** toggle button to enable or disable the desktop notifications to play sound. You can use the slider to adjust the volume.
- Click  to mute the sound, and to unmute the sound, click .
 - Click  to listen to the default sound.

Note By default, the **Enable Sound Notifications** toggle button is enabled, and the volume is set to 80 percent.

Your changes to the **Notification Settings** are retained until you clear the browser cache. When you sign out and sign in again, the default values are assigned to the **Notification Settings**.

Access Notification Center


The Notification Center displays desktop alerts and notifications.

To access the Notification Center:


Before you begin

Ensure that you select the **Enable Notifications** option under the **Notification Settings** section to access the Notification Center. For more information, see [Enable or Disable Notification Settings, on page 9](#).

Procedure

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- Step 1** Click the  (**Notification Center**) icon on the horizontal header. The list of all unread notifications is displayed, along with the time elapsed after each notification.
- Step 2** (Optional) Click **Mark All as Read** to mark all of your messages as read and clear the unread notifications.

Note

- The icon displays a badge indicating the number of unread notifications (for example, .
 - The desktop notification can be stacked, and can be automatically dismissed or closed by you. Click **Ignore Notifications** to dismiss the notifications.
 - The desktop notifications are cleared when you sign out of the desktop.
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Access Screen Pop


Your administrator can define workflows that are triggered by voice calls requests. For example, your administrator can create a workflow that causes the browser to pop on your desktop when you either accept or end a call.



Note Currently, the workflows are defined for only inbound voice calls.

To access a Screen Pop which you closed accidentally:

Procedure

Step 1 Click the  (**Notification Center**) icon on the horizontal header.
The drop-down list displays the **Screen Pop Delivered** message, the time elapsed, and the Automatic Number Identification (ANI) of the voice call.

Step 2 Click the Screen Pop hyperlink. The display text for the Screen Pop hyperlink is defined by your administrator. Based on the routing configuration that your administrator has set in Flow Designer, you can see either the customized display text or the **Reopen Screen Pop** hyperlink.

The Screen Pop is displayed in either of the following ways:

- In the existing browser tab, replacing the previous Screen Pop
- As a new browser tab without affecting the existing Screen Pop
- As a new tab in the Auxiliary Information pane
- As a custom page
- As one of the widgets in the custom page

Screen Pop custom page can be accessed by clicking the **Screen Pop** icon on the Navigation bar. Screen Pop widget in the custom page can be accessed by clicking the custom icon on the Navigation bar. If Screen Pop is not configured, the custom page appears blank.

Note If the Screen Pop is configured to be displayed as a new tab in the Auxiliary Information pane, the Screen Pop is displayed in the Auxiliary Information pane for the duration of the call. The Screen Pop is retained even when you select a task of another channel type in the Task List pane.

Download Error Report

If you experience problems with the desktop, you can send the desktop logs to your administrator for investigating the issue.

Before you begin

You must be signed in to the Agent Desktop. For more information, see [Sign In to the Agent Desktop](#).

Procedure

Step 1 Click **User Profile** on the top-right corner of your screen.

Step 2 In the **Help** section, click **Download Error Report**.

After the desktop downloads the error report successfully, you can share the report with your administrator to investigate the issue.

- Note**
- You can download the error report even when the desktop is recovering from the connection failure.
 - If your browser freezes or crashes before you can click the **Download Error Report** option and you must restart your browser, do not click the **Download Error Report** option right away.
- When you restart the browser, the logs are no longer available. Wait until the desktop starts to exhibit the problem again and then select the option.
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Sign Out from the Agent Desktop



Important

Do not close your browser to sign out from the Agent Desktop. You cannot sign out from the Agent Desktop if you have an active conversation. Wrap up all your active conversations before you sign out. For more information, see [Apply Wrap Up Reason, on page 5](#).

To sign out from the Agent Desktop:

Before you begin

Complete your active conversation with the customer.

Procedure

Step 1 Ensure that your state is set to **Idle**. Click **User Profile** at the top-right corner of your desktop.

Step 2 Click **Sign Out**.

- Note**
- If you are in the **Available** or **Idle** state without any ongoing conversations, your supervisor can sign you out of the Agent Desktop. You must sign in again to access the Agent Desktop. For more information, see [Sign In to the Agent Desktop, on page 1](#).
 - You are prompted with the confirmation message before you sign out.
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