Instructions for SAP CCtr

How to use SAP Contact Center phone system

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How to start the program

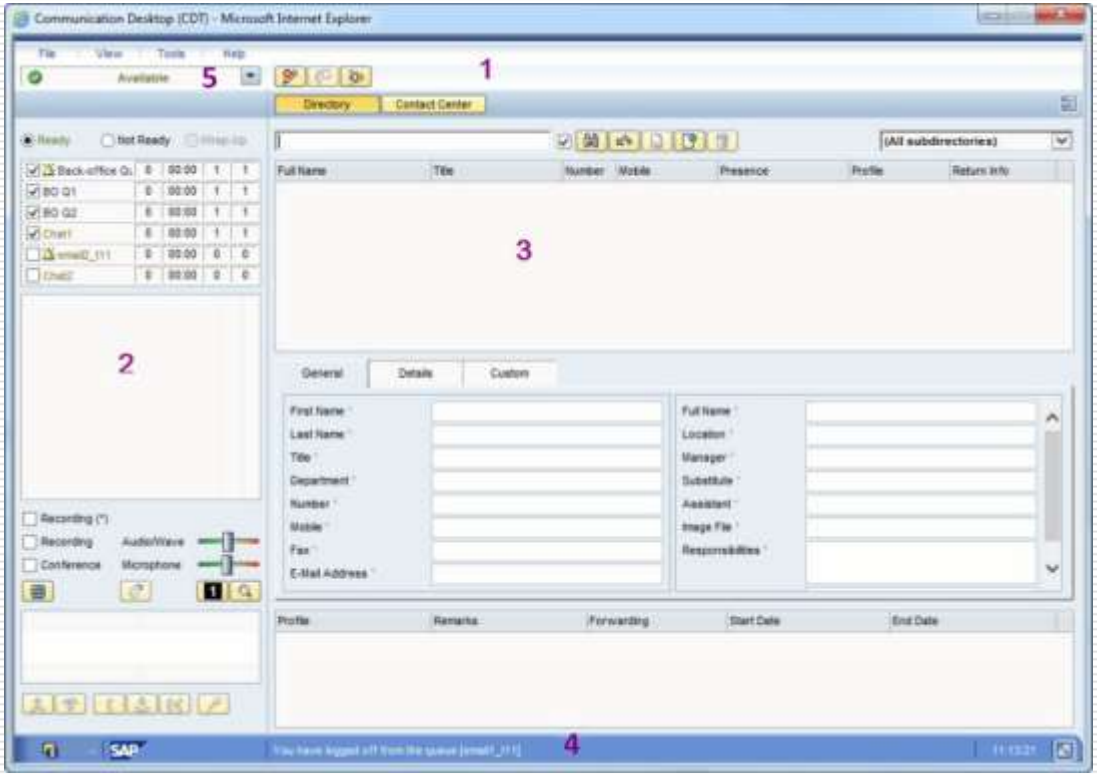
1. Open Internet Explorer browser.
   - Type http://[SAP Contact Center Website].ipcallcenters.eu into the address bar and press “ENTER”. Logon page comes up:

2. Enter your username and the password.
   Click “Log on” or press “ENTER” to log in.

CDT window

The user interface contains the following elements:

- Menu bar and toolbar (1)
- Contact view (2)
- Directory and contact center views (3)
- Status bar (4)
- Presence menu (5)



CDT window

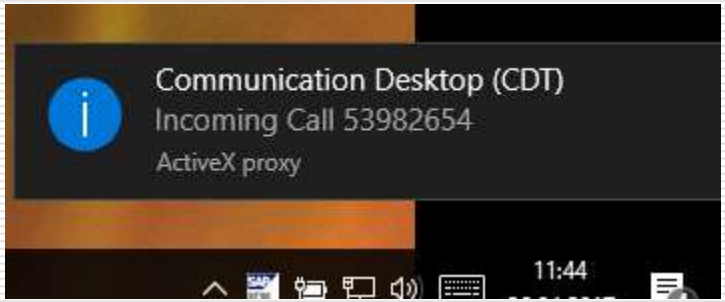
The contact view is used for phone and queue functions, and it has the following parts:

- Agent status and queue list (1)
- Contact list that displays your current inbound and outbound contacts (2)
- Optional functions such as recording and ringback (3)
- Destination field (4)
- Call-related buttons such as Call, Hang Up, and Transfer (5)

CDT window

- When CDT is open, then this is indicated by the icon in the lower right corner (usually shown under hidden icons):

- You can click on it to see CDT window.
- When someone calls you then it is shown as pop-up:



CDT window “Menu”

File

- Online Monitoring=> Opens the Online Monitoring application
  - This option is only available if you have rights to use Online Monitoring and administrators have configured the user interface settings so that the application is shown in the menu.
- Reload=> Updates the screen
- Exit => Closes the application

View

- Compact => Displays a limited collection of basic functions
- Normal => Displays the contact view
- Extended => Displays the entire user interface
- Directory => Displays the Directory view
- Contact Center => Displays the Contact Center view

CDT window “Menu”

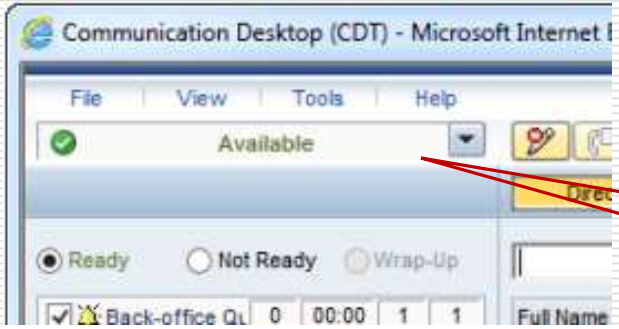
Tools

- Settings => Here you can change your phone’s behaviour
- Calls => Show last 25 personal missed, dialed and answered calls.
- Inbox => Here you can listen to your voice messages.
- Send Message => You can send instant, e-mail and SMS messages and reply to instant messages and e-mails.
- Presence information => Opens the Presence Information dialog window.

Help

- Application Help=> SAP CCtr help.
- Diagnostics => Opens the Diagnostics dialog window.
  - In case you have problems with CDT and you need to report them to your support team, the Diagnostics view displays information that is useful in the problem solving process. You can, for example, select the whole dialog window by pressing Ctrl + A and then copy and paste the information to an e-mail you send to the support team. This way all the relevant technical information related to your CDT client is available to them immediately.
- About => Displays the software version information.

CDT window
"Profile *(PRS Personal Reachability Services)*"



Profiles are used to control your CDT and show others whether you are free or busy (Meeting, lunch, ill etc.).

You can see active profile in the profiles field.

1. To choose a profile, click the arrow to open the dropdown menu in the presence toolbar. A list of available profiles opens.
2. Click the profile you want to activate. The profile is activated immediately.
3. To view the details of the profile (such as default action), place the cursor on the field and a tooltip displays the detailed information of the profile.

CDT window “Telephone and call”

Calls list displays information about ongoing call and incoming calls

Opens keyboard screen

Here you enter number when calling out manually.

Buttons to control a call:

=> Call => Start a new call.

=> Hang up => End the call.

=> Hold => Put a call on hold.

=> Mute microphone.

=> Answer => Answer a call

=> Redirect (Forward) => Connect two active calls and delete these from your list

=> Transfer => Transfer a active call to entered number

CDT window “Directory”

- Use the Directory view to search the customer or agent information from the available directories

Find people by typing text here and press "Search" or hit ENTER

Click on the name you searched

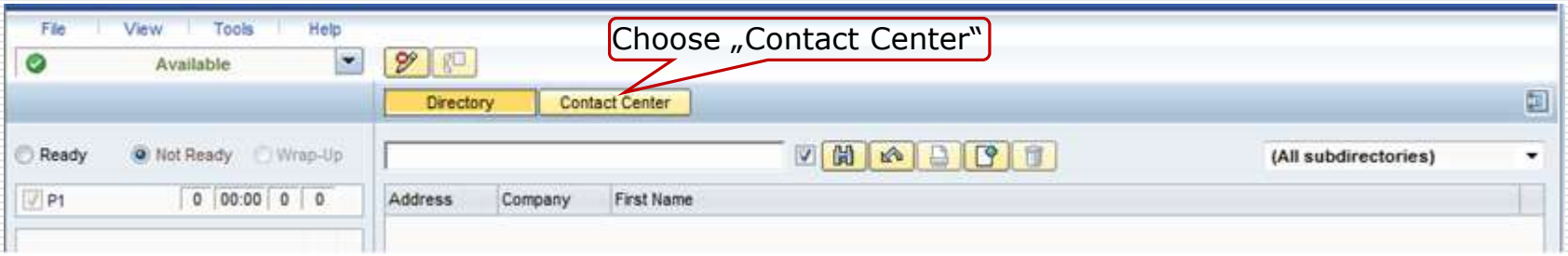
If you want to call him then choose number here

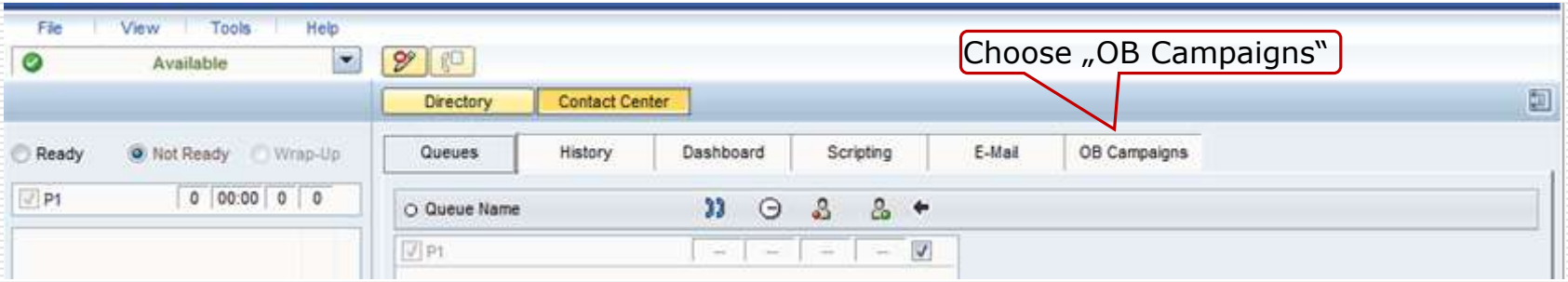
Search

Clear

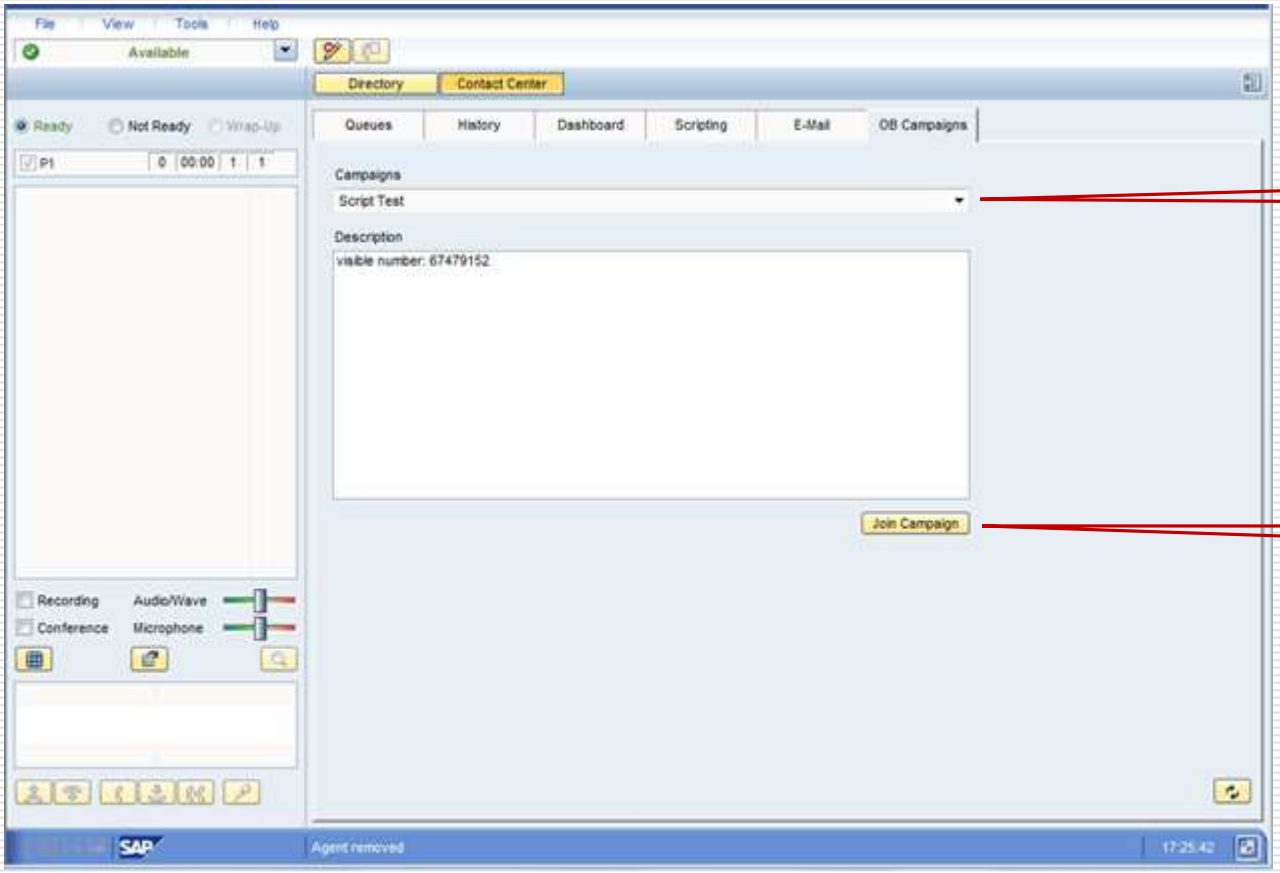
Availability and return information for absence profiles

Outbound
Enter Outbound





Outbound
Enter Outbound



1. Choose the Campaign

2. Join Campaign

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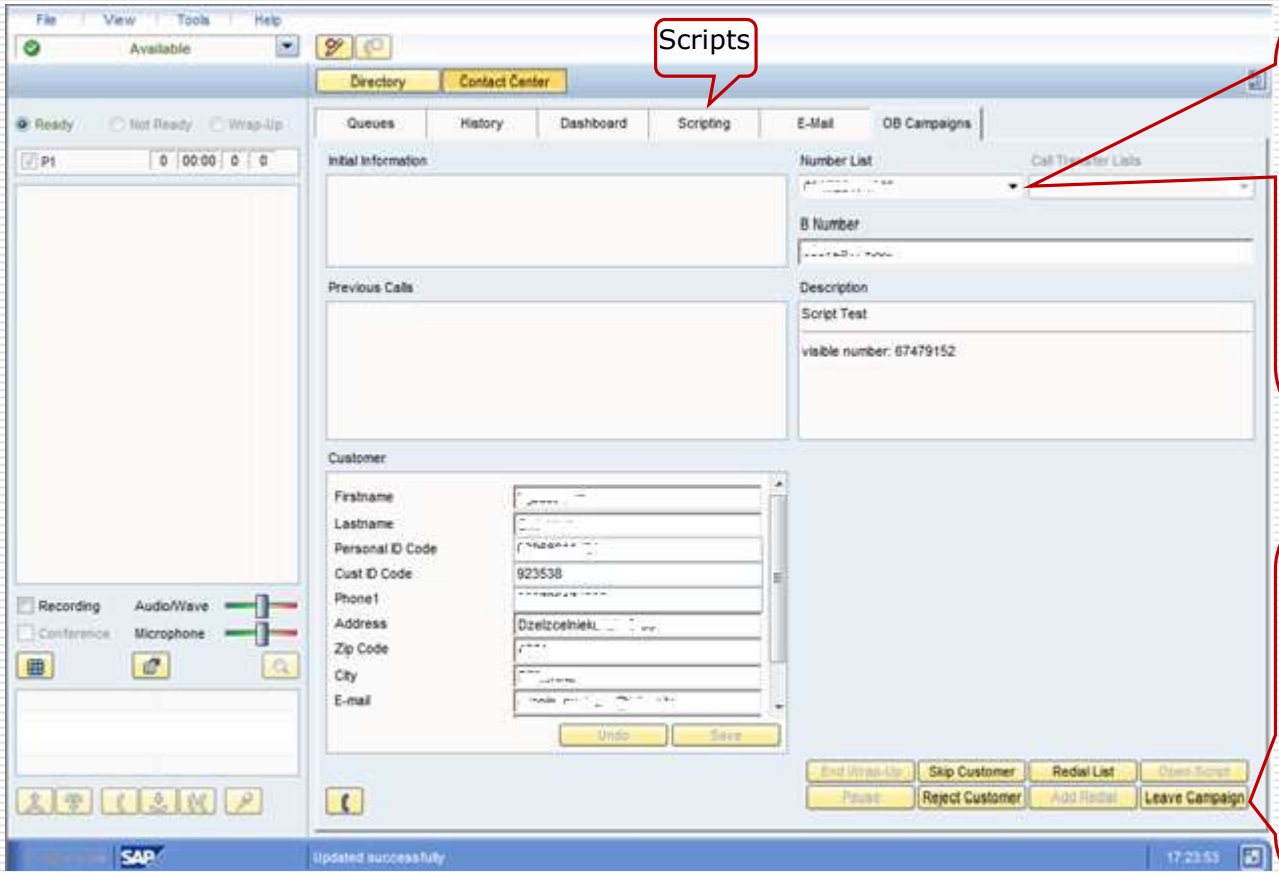
Outbound
Customer view, Calling



Calling:
1.View the customer information.
2.Choose the number from the Number list. Optionally, you can enter the number in the field B Number.
3.Choose the End Preview or Call button, or press F1. You will hear the dialing tone before the customer answers.

To leave campaign:
Choose the Leave Campaign button. The button is enabled after selecting the call result.
Please do not use End Wrap-Up for leaving campaign, as the new call is allocated immediately after that push.

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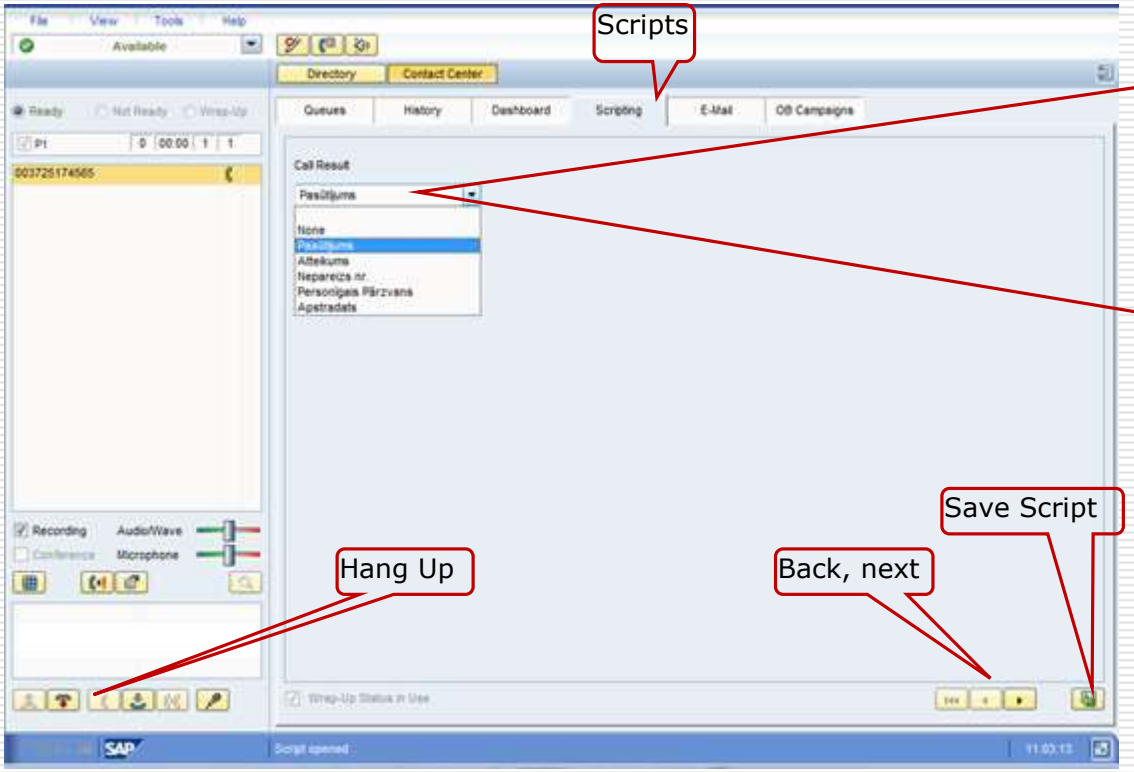
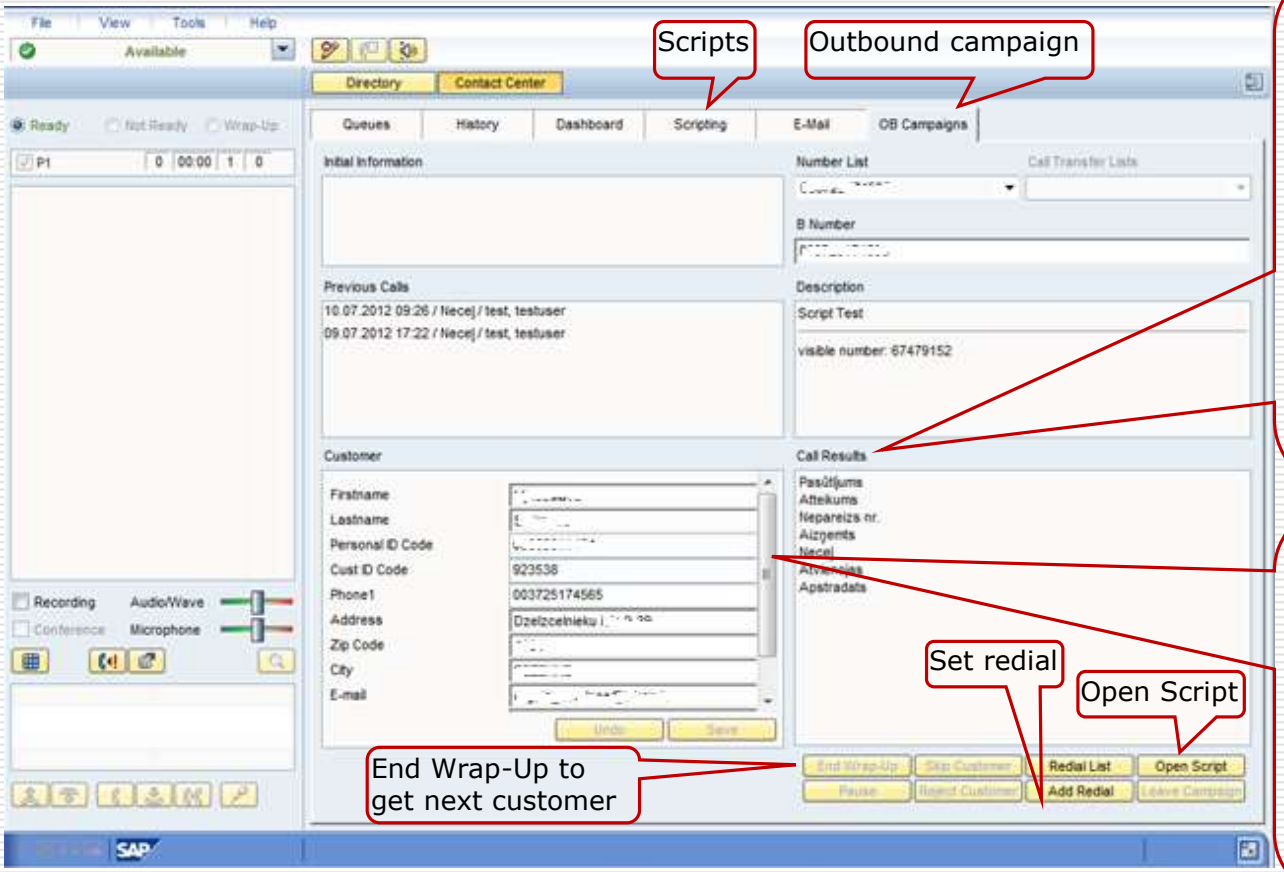
Outbound Scripts



Scripts Procedure:

1.Choose the **Open Script** button, or the **Script** tab.
The script may open automatically when a call starts; that is defined in campaign settings.
2.If the call is unsuccessful, to terminate the script without saving the changes, choose the **Close** and **End Wrap-Up** buttons to take the next call.
3.If the call is successful, follow the script, and enter the answers according to the customer answers. To move back and forth in the script, choose the browsing buttons Previous and Next.
4.To finish the call, choose the **Hang Up button**.
5.If needed, go to the beginning of the script, and check the answers.
6.Choose **Save**.
7.To take the next call, choose **End Wrap-Up**.

Outbound - Call result, Customer information



Defining Call Result:
The Call Result list is shown after the call has ended. Call results define if the customers are considered handled (for example with results Successful or Refusal) or are they called again during this campaign (for example call results Busy or No Answer).

1.Click the Call Result list.
2.Choose an appropriate call result.

You can **update customer information** either during the call or wrap-up.

1.Choose the Customer block.
2.Enter a new or updated information to appropriate line.
3.Choose Undo to cancel, or Save to confirm updates.

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Outbound – Campaign view elements

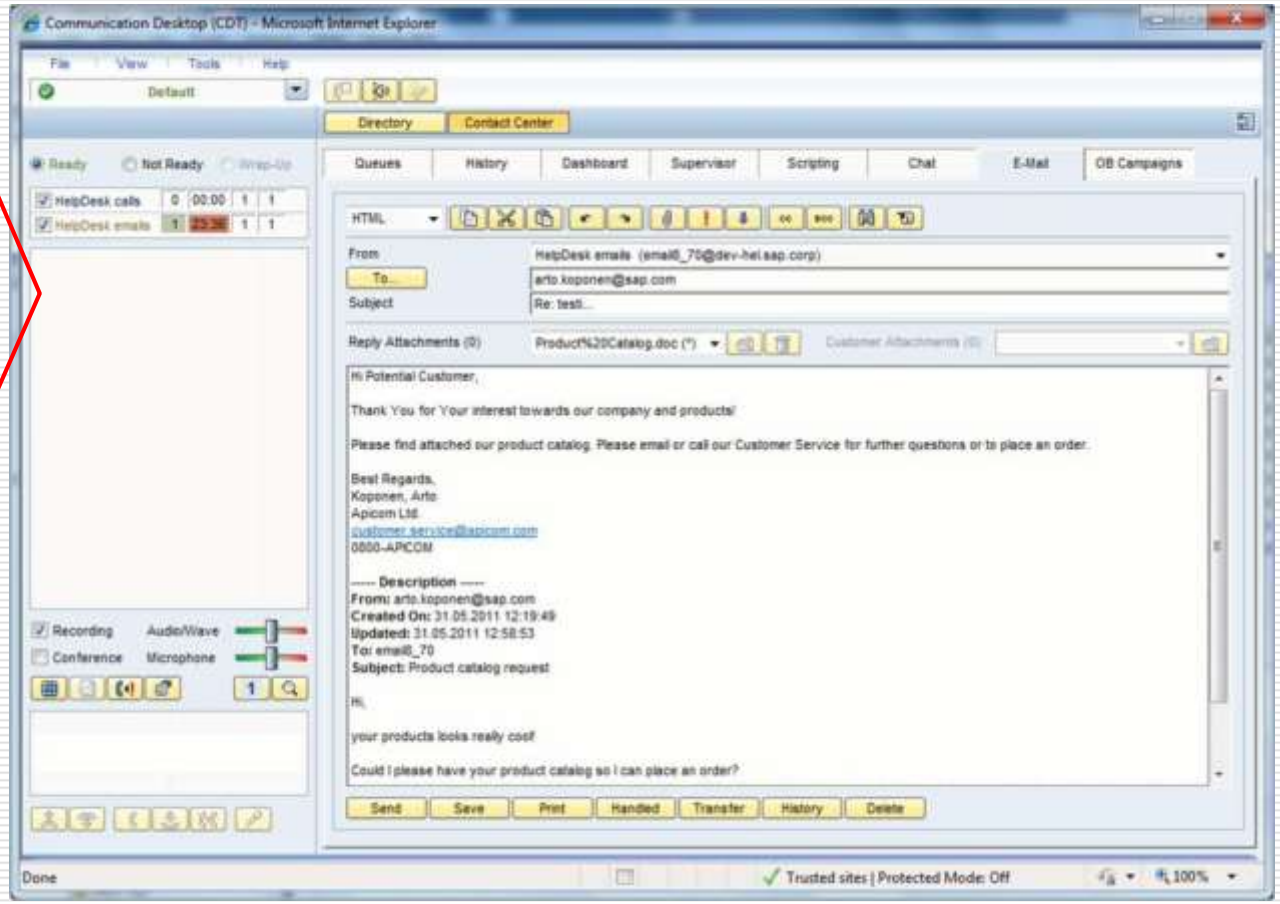
Field	Description
Initial Information	Displays the customer information defined by the administrators. You can copy this text using your keyboard: Ctrl + A for selecting the whole text and Ctrl + C for copying it.
Previous Calls	Displays the calls made to the customer
Redial Information (Agent)	Displays the redial information you have entered
Customer	Displays the customer information . The fields are defined by the administrators. They can also define that you can modify the customer information fields.
Number List	Displays the customer numbers to which you can make the campaign calls. If the customer has several numbers, they are listed here. To choose the number, click the arrow. The list opens, and you can select the correct number by clicking it. The number is then moved to the *B Number* field.
Call Transfer Lists	Displays the numbers to which you can transfer calls and make conference calls. The administrators define this list.
B Number	Displays the customer number to which the campaign call is made. You can also enter an optional number to which a call can be made.
Description	Displays the campaign information the administrators have defined when they created the campaign. You can copy this text using your keyboard: Ctrl + A for selecting the whole text and Ctrl + C for copying it.
Call Results	Displays a list of options for call classification.
Redial Information	Displays a text area in which you can schedule the time when the customer is called again.

E-mail handling Preview

Agents can easily compile email responses to customers using queue specific answer templates. Email response can be compiled from one or many answer templates.

Also faxes and sms messages are handled as emails in SAP Contact Center system.

Call or chat contact can be routed to agent while agents is working with customer email. This can be enabled or disabled per email queue.



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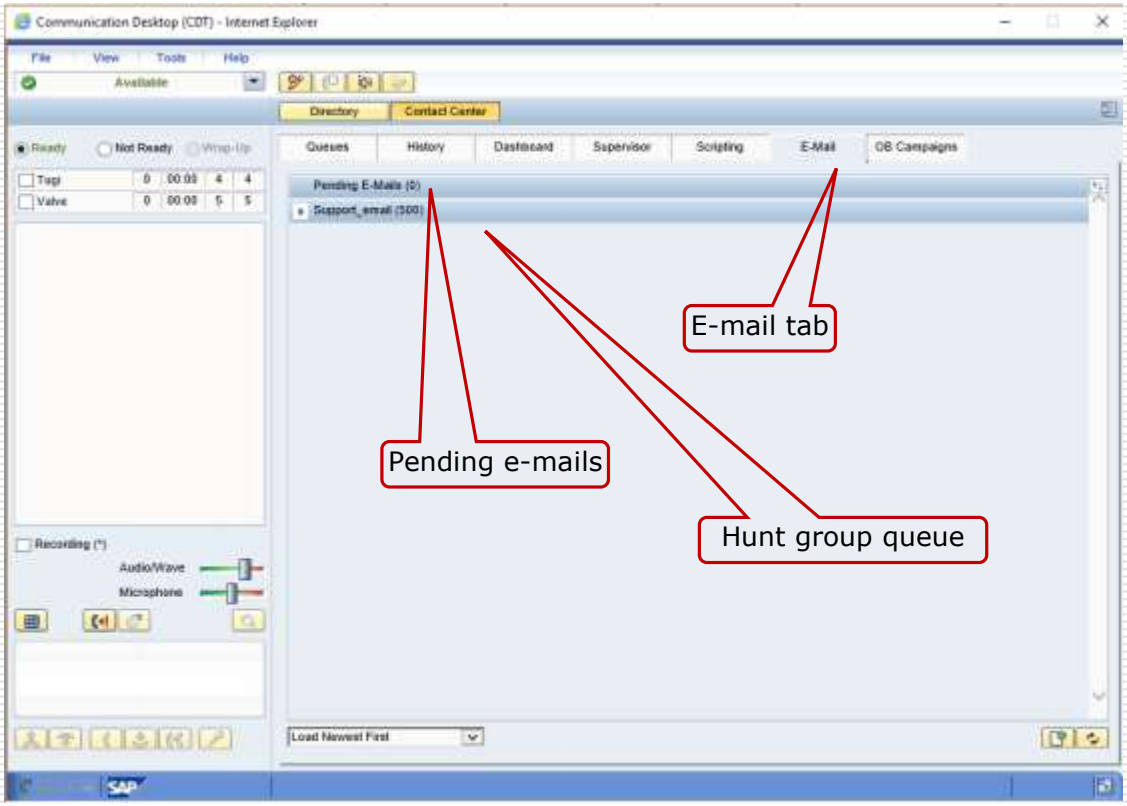
E-mail handling
Pending E-Mails View

When you choose the E-Mail tab, the e-mail view is in the list mode.

This mode displays all your pending e-mails and below them, e-mails from hunt group queues (the queuing e-mails).

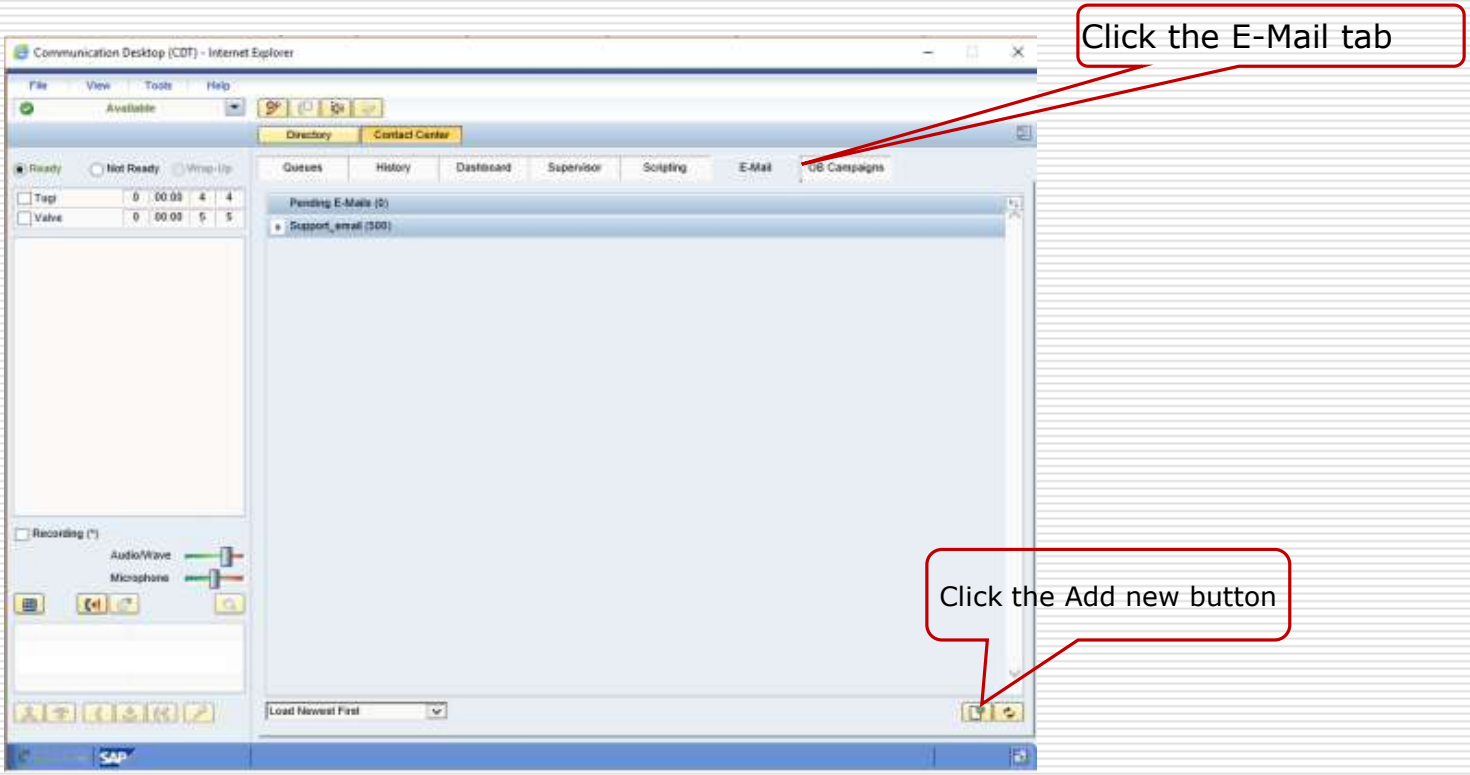
If the waiting time of a queuing e-mail exceeds the Warning Time and Critical Time, the background color is changed to yellow and red respectively, and the corresponding icon is displayed at the beginning of the row.



E-mail handling
Pending E-Mails View

Function	Description
Expanding and collapsing the e-mail list	Click the tree header to expand or collapse the e-mail list or use the icons and .
Sorting the order of e-mails	Click the column header according to which you want to sort your e-mails.
Opening an e-mail	Open an e-mail for editing by Accepting an inbound e-mail (an auto-allocation queue) Double-clicking a pending e-mail Right-clicking a pending e-mail and choose *Reply*, *Reply All*, or *Forward* When an e-mail is opened for editing, it is automatically moved to the *Pending E-Mails* list.
Viewing the e-mail	Right-click an e-mail on the pending list and choose *View* or *Preview (Contact Details)*. The latter option opens the e-mail in the *Contact Details* dialog window.
Deleting an e-mail	Right-click an e-mail on the pending list and choose *Delete*.
Creating new e-mail messages	For more information, see Creating New E-Mails.
Refreshing the view	Click the *Refresh* button to renew the view.

E-mail handling
Creating new e-mail



- Enter the recipient address.
- If you enter several e-mail addresses, separate them with a semicolon.

E-mail handling
Creating new e-mail

To continue working on the e-mail later, save it. The e-mail is saved onto your pending list.

To forward the e-mail, click the Transfer button. You can only forward the e-mail to a queue.

You can delete e-mail.

You can mark e-mail as handled.

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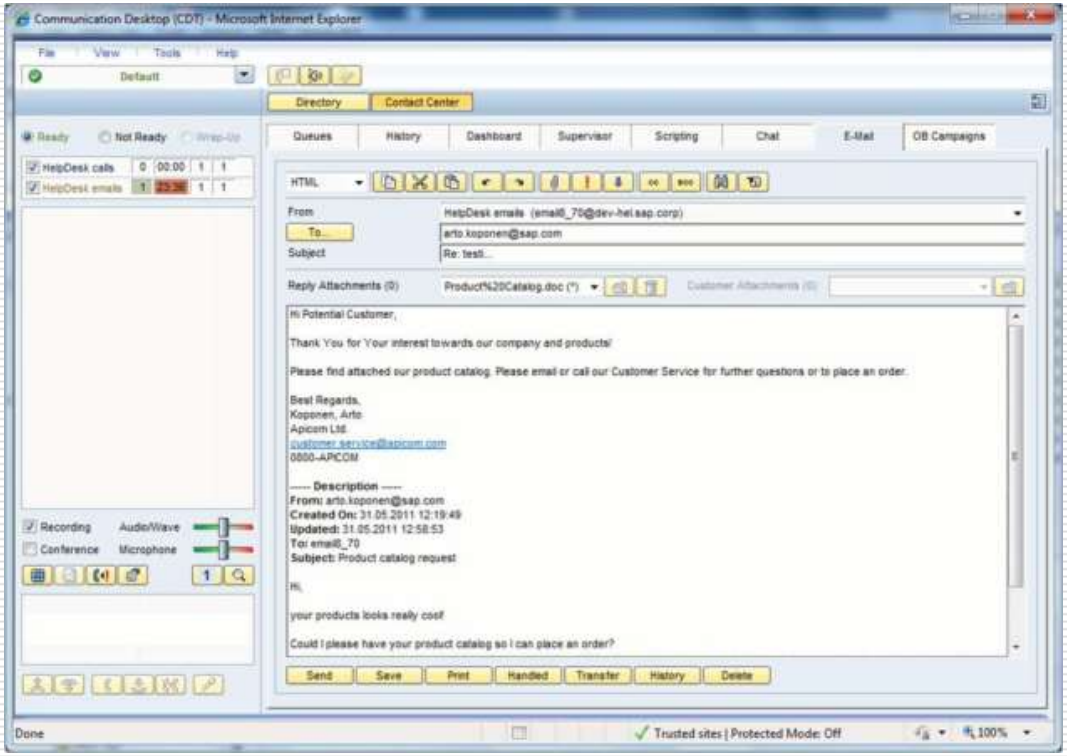
E-mail handling
Handling e-mail

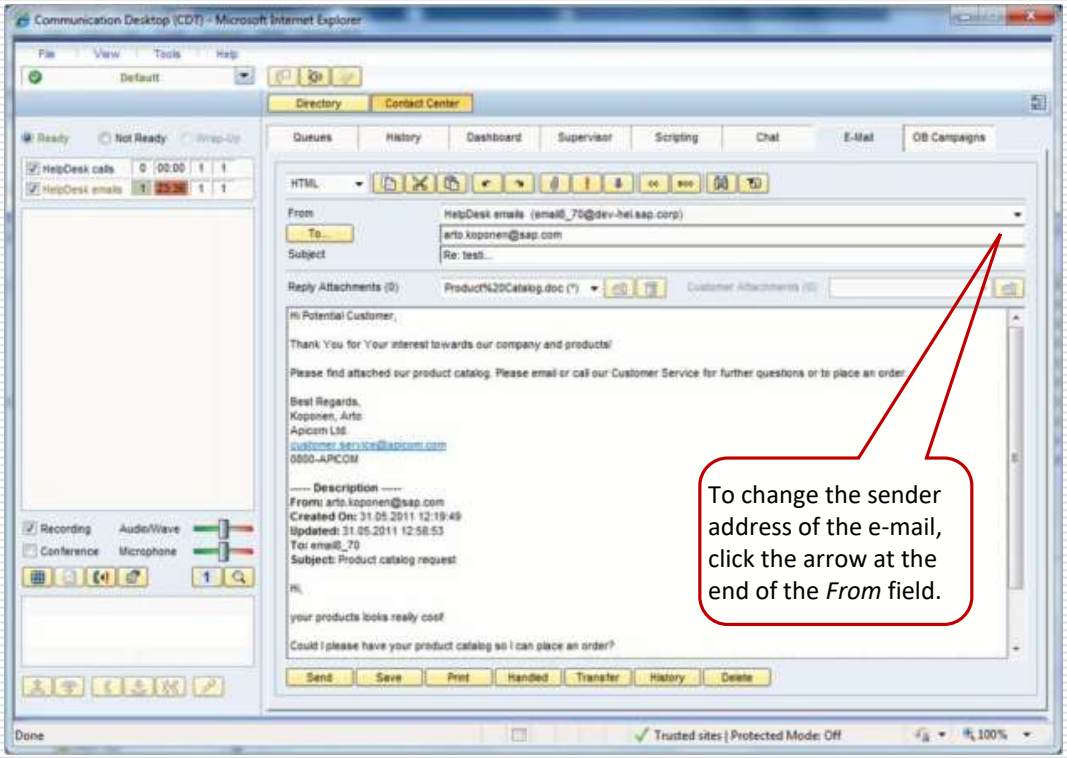
- To accept an inbound e-mail in an *auto-allocation* queue, click the Accept or click the notification popup when the e-mail is offered to you. If you reject an inbound e-mail, it is returned to the original queue.
- Or if you are serving in *hunt group* queues, go to the E-Mail tab page. The e-mails in the queues are listed per queue. To start handling a hunt group e-mail, double-click the e-mail.



- Enter your reply text either in the text or HTML mode. The basic text formatting tools are available in the HTML mode.

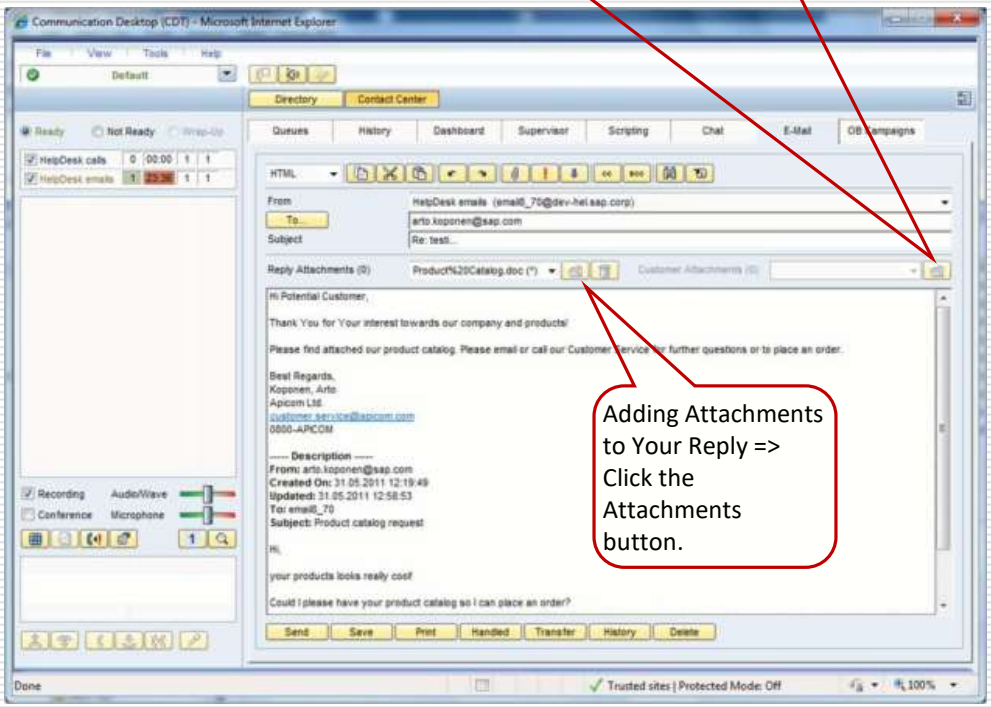
E-mail handling
Handling e-mail

- To change the recipient of the e-mail, click To to open the SAP Contact Center directory or enter the new e-mail into the To field. If you add several recipients, separate them with a semicolon.
- To send the e-mail, click the Send button. Or use the shortcut key Ctrl + D.
- The Send button remains disabled until you either change sender or recipient address or click these fields.



E-mail handling Attachments

Handling Received Attachments =>
Click the Open button, double-click the attachment, or select it and press ENTER.
To copy customer attachments to Reply Attachments, click the Copy all to reply attachments button or press Ctrl and double-click an attachment.

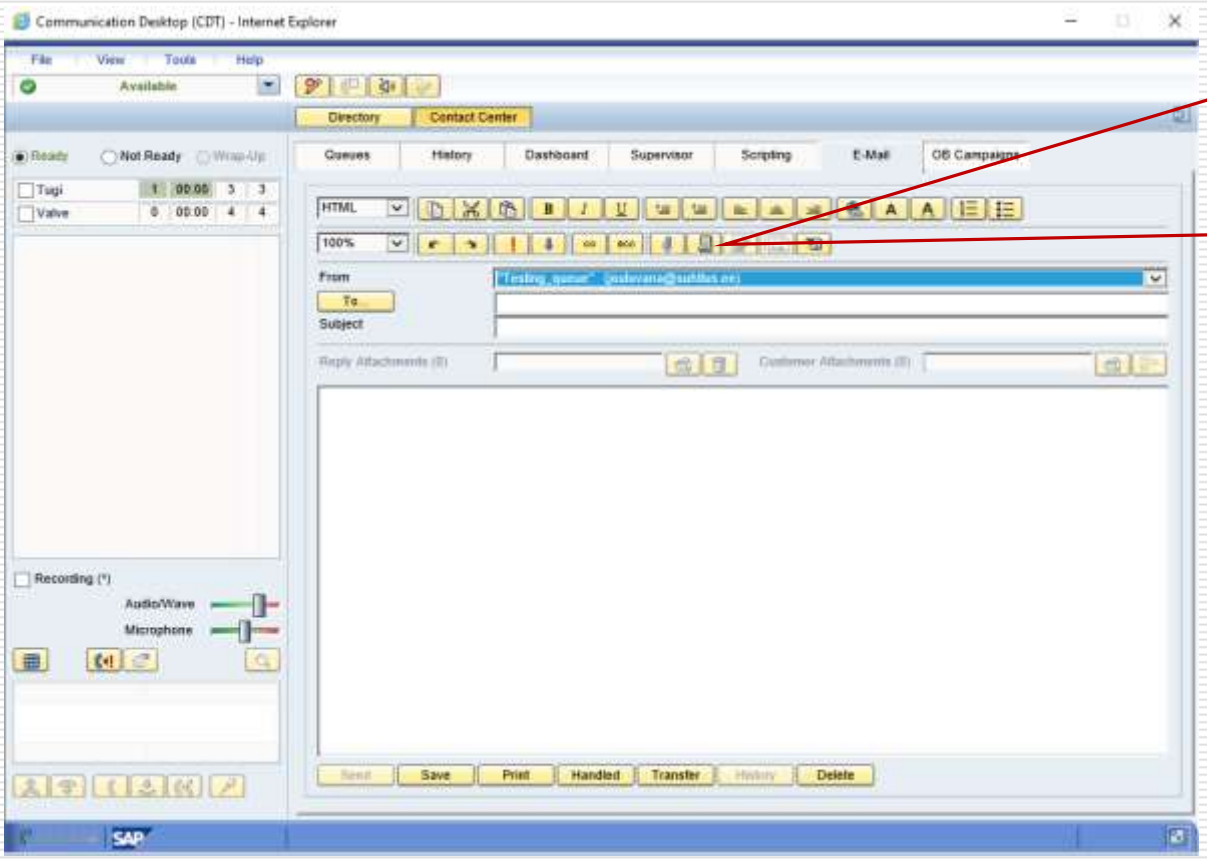


Adding Attachments to Your Reply => Click the Attachments button.

Handling Several Attachments

- To save, open, or delete several attachments at the same time, do the following:
- Hold down Shift or Ctrl and simultaneously click the attachments you want to select, or use the key combination Ctrl + A to select all.
- To remove the selected attachments, click the Delete button or press Delete on your keyboard. (This only applies to reply attachments.)
- To save or open the selected attachments, click the Open button or press ENTER.
- When you save attachments, CDT remembers the last saved location but the location is reset when you open a new e-mail

E-mail handling
Using Reply template



1. Click the Templates button.
The Templates dialog window opens and displays the available templates.
2. Choose a folder by double-clicking it and then insert a template into the e-mail message by clicking the template row.
3. Click Apply.

The template can contain subject text, body text, attachment files,

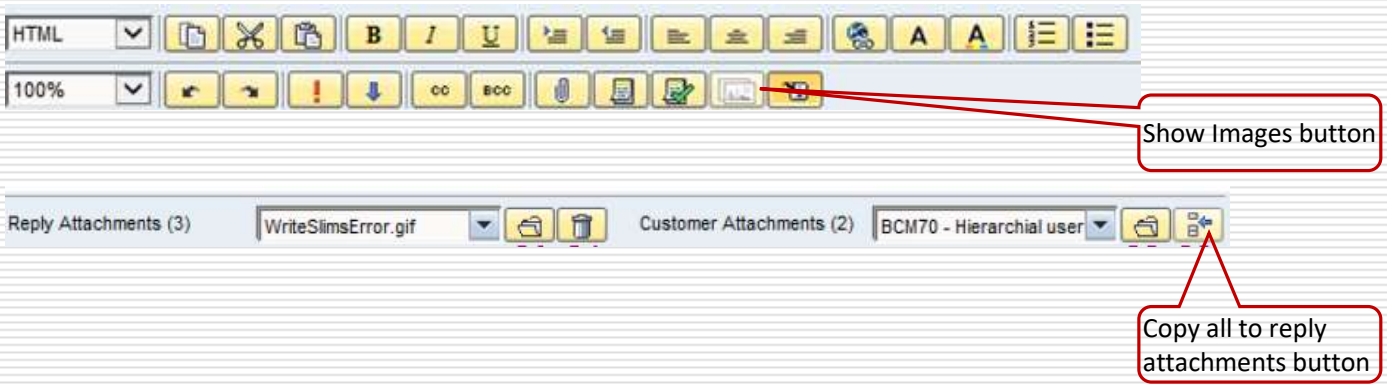
E-mail handling
Using Default Reply template

- Administrators can define that a queue has a default reply template in use. Instead of opening the Templates folder and manually choosing the right reply template, you can insert it with one button click or with a shortcut key.

Click the *Use default reply template* button.
Or
Use the shortcut key `Ctrl+T`.

The defined reply template is inserted into your reply.

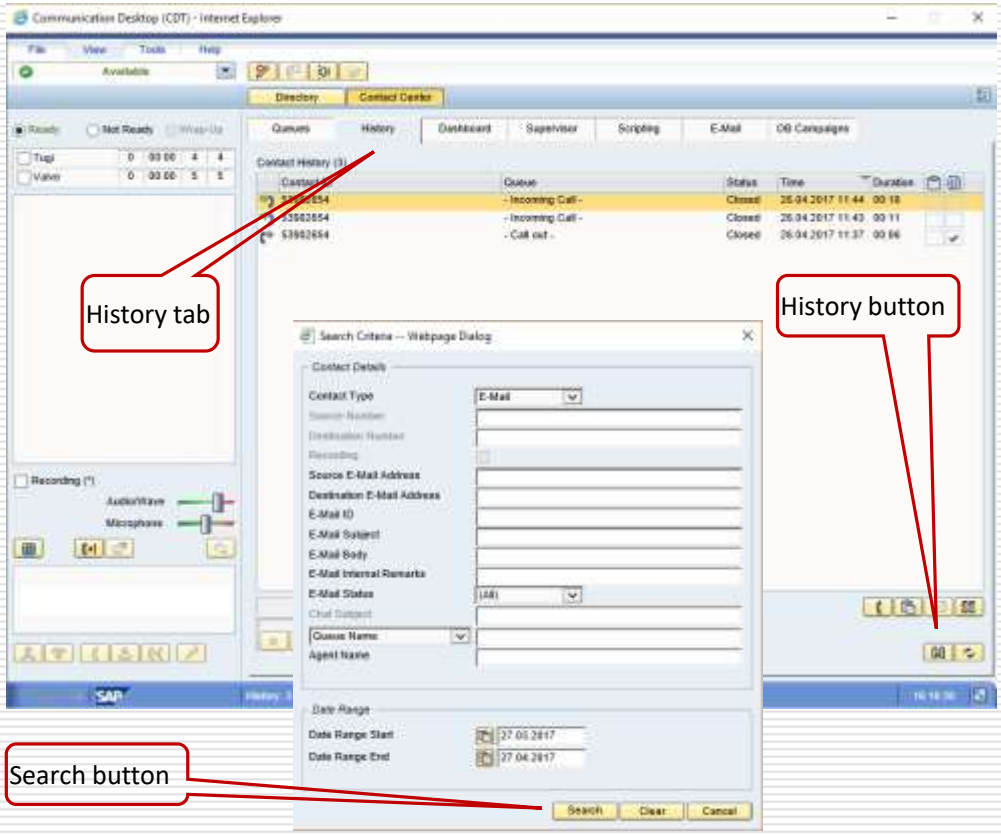
E-mail handling
Viewing Embedded images



To display embedded images in an inbound e-mail body, do the following:

1. Open an e-mail for viewing or editing or accept an incoming e-mail.
2. Click the Show Images button.
   - The embedded images are downloaded and shown in the body text area.
   - If an attachment file does not contain file extension, CDT adds the .txt extension to it so that the file can be opened by a browser.
   - The embedded image files are also available in the attachment list marked with "[x]".
3. To include the received embedded images in your reply, click the Copy all to reply attachments button. The embedded images are now sent in your reply.

Using History Search



Procedure

1. To search for the contact history, click the History button.
   The Search Criteria dialog window opens. Contact Type and the date range values are automatically filled. You can enter more search criteria or change them.

2. Click Search, and the results are displayed on the History tab page. If there are no results, the page is empty and the status bar displays the text “0 results found”.