



## CyDesk Console Quickstart Guide



Unified  
Communications

Contact Centre  
Technologies

Business  
Intelligence

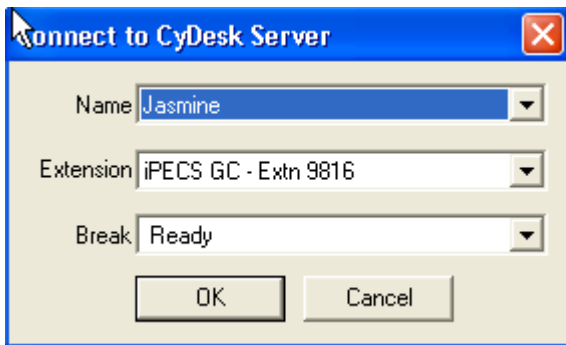
# Table of Contents

---

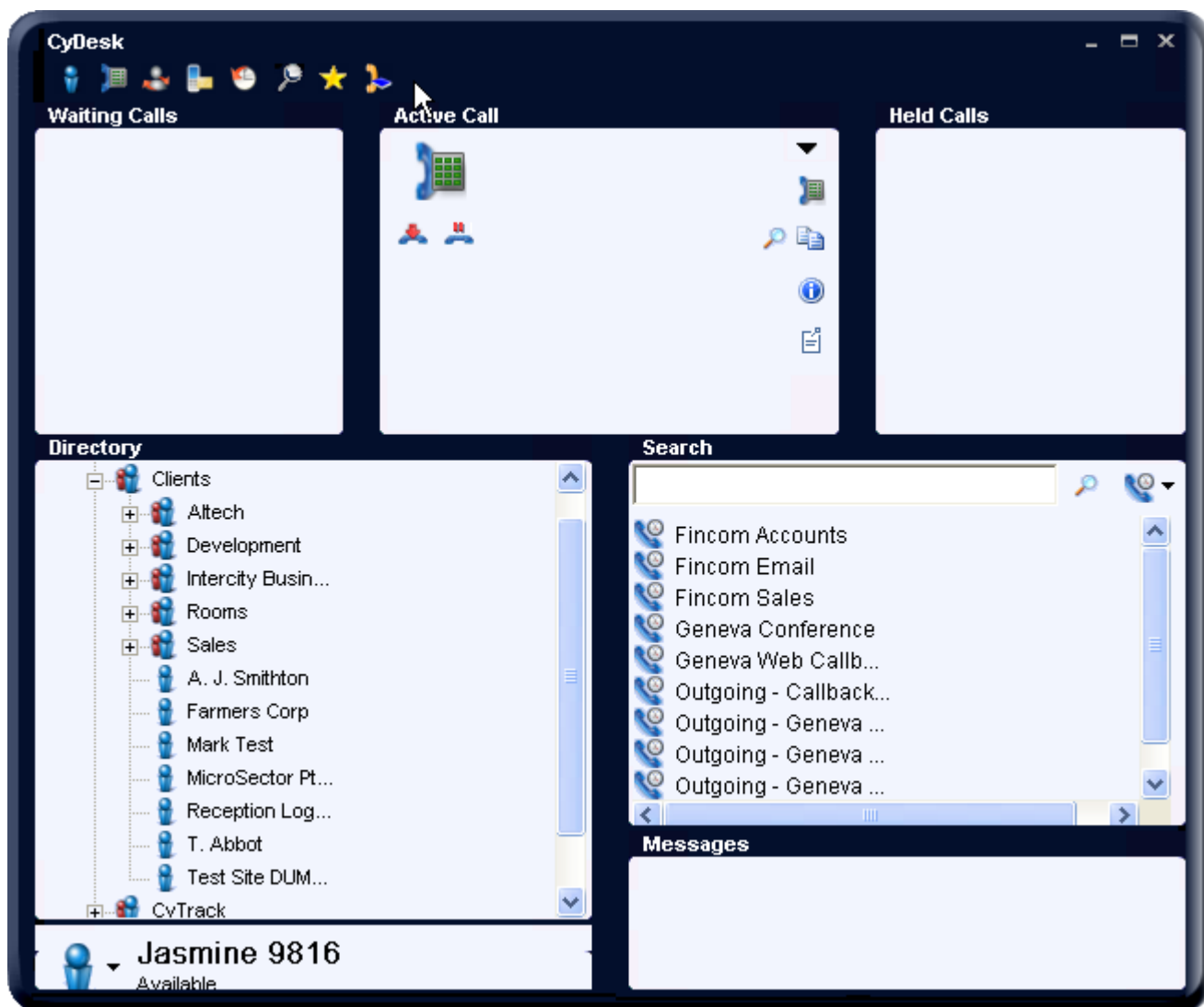
|                              |    |
|------------------------------|----|
| Login .....                  | 3  |
| Break .....                  | 4  |
| Dial .....                   | 5  |
| Answer .....                 | 6  |
| Team .....                   | 7  |
| Search .....                 | 8  |
| History .....                | 9  |
| Directory .....              | 10 |
| Messages .....               | 12 |
| Scripts and Notes .....      | 12 |
| Multiple Call Handling ..... | 13 |

## Login

When CyDesk Console is started, the 'Connect to CTI Server' window will be displayed.

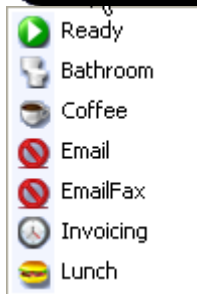
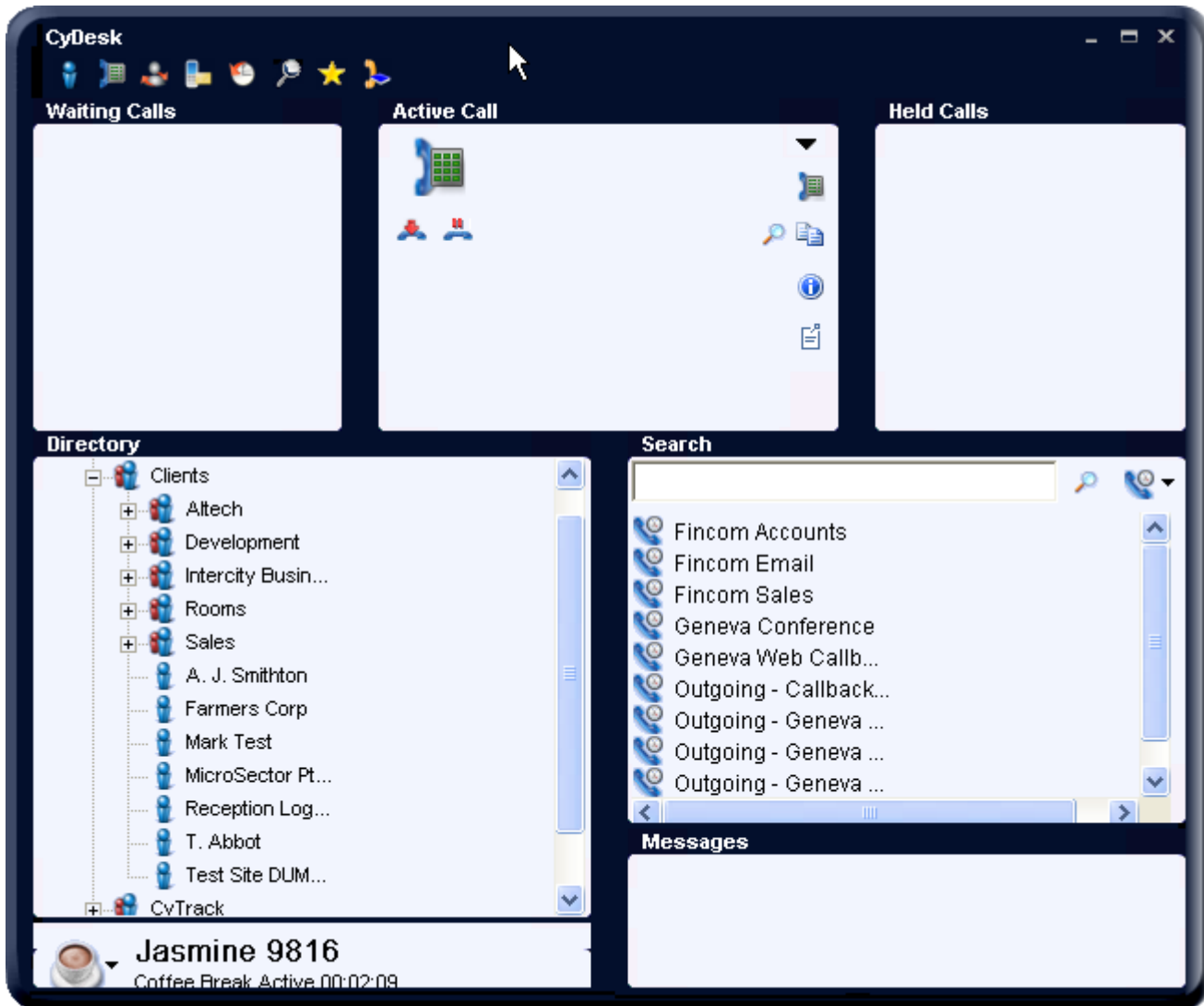


Select the correct agent name and extension and log in. To log in already on a break, select the break type from the list. See 'Breaks' for me details. Once the login is complete, CyDesk will be displayed showing the logged in agent name and extension number, and the agent's status.



## Break

To change your status from 'Available' click on the drop down menu and select the appropriate break. Your status will then change, on your CyDesk and for all other CyDesk users.




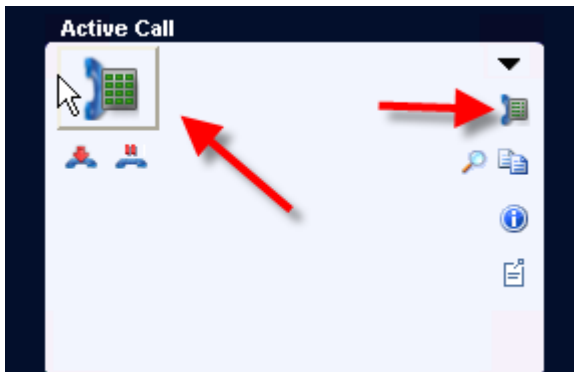
## Dial

---

Just right click on any number in your PC desktop – whether it be an email, web page or Word document, select Copy and then select 'Yes' to dial. Once CyDesk is set up with your customer database or CRM system, simply

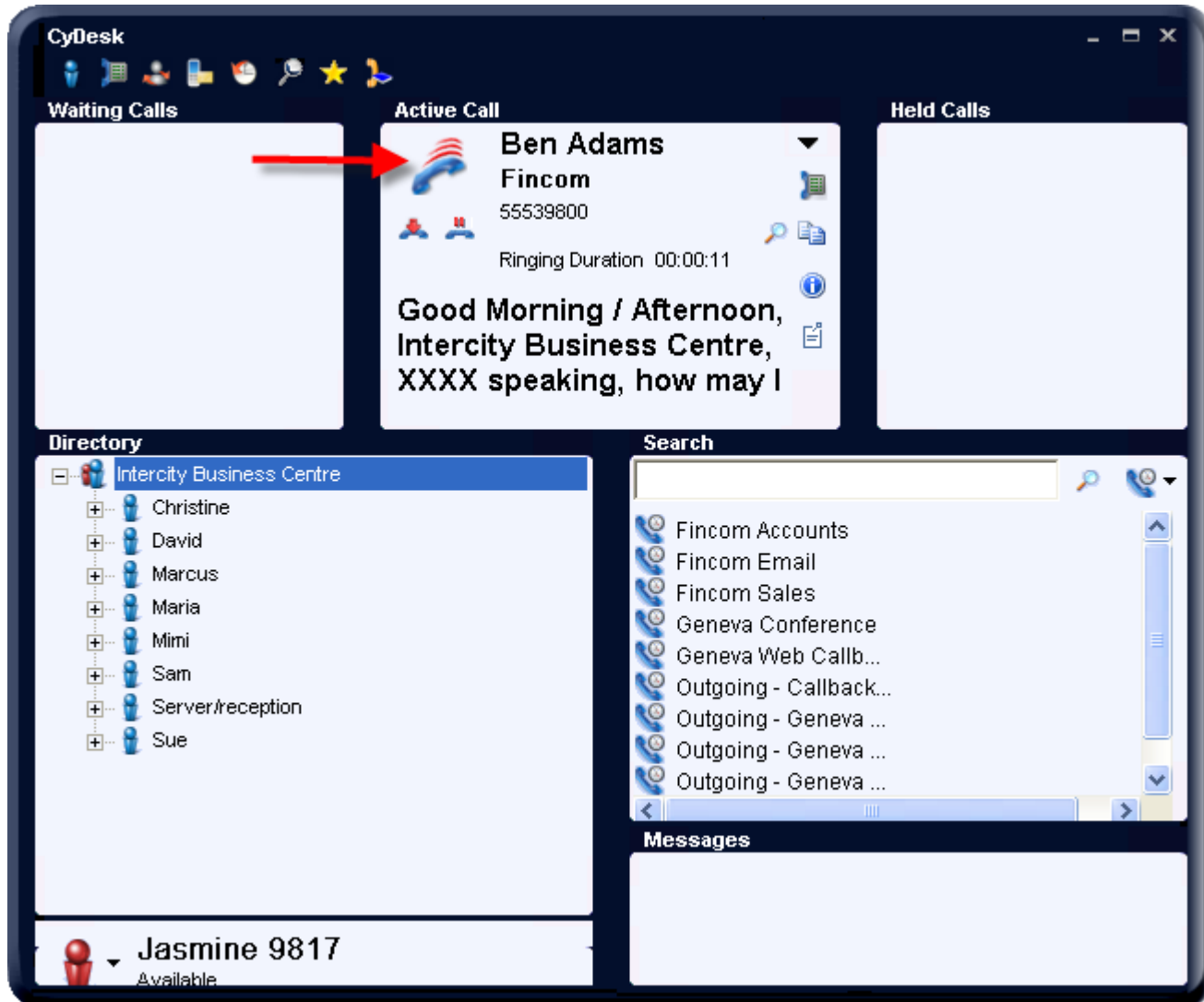
double click the number to dial your contact. Alternatively, click the 'Active Call'  button to show the Active Call window



and click on the Dial button 




## Answer

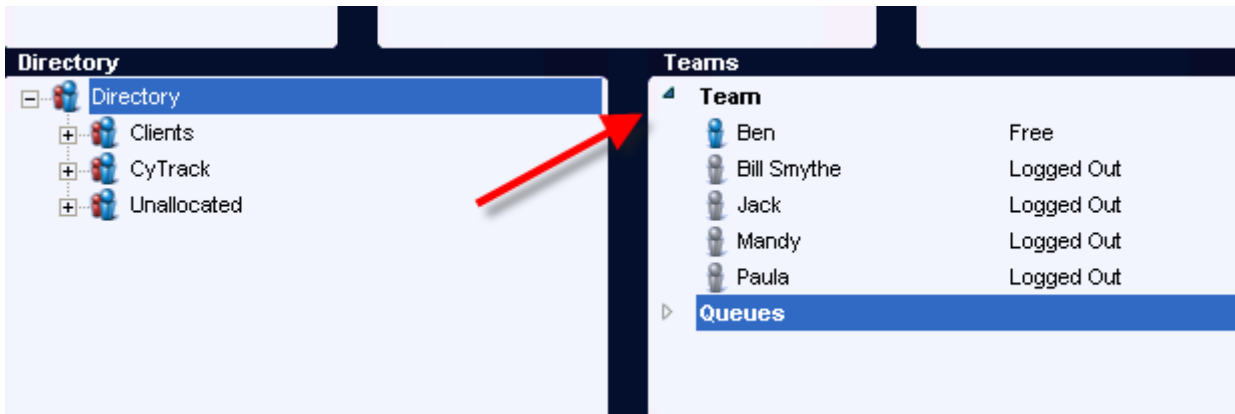
When an incoming call is received externally or internally, CyDesk will be displayed.



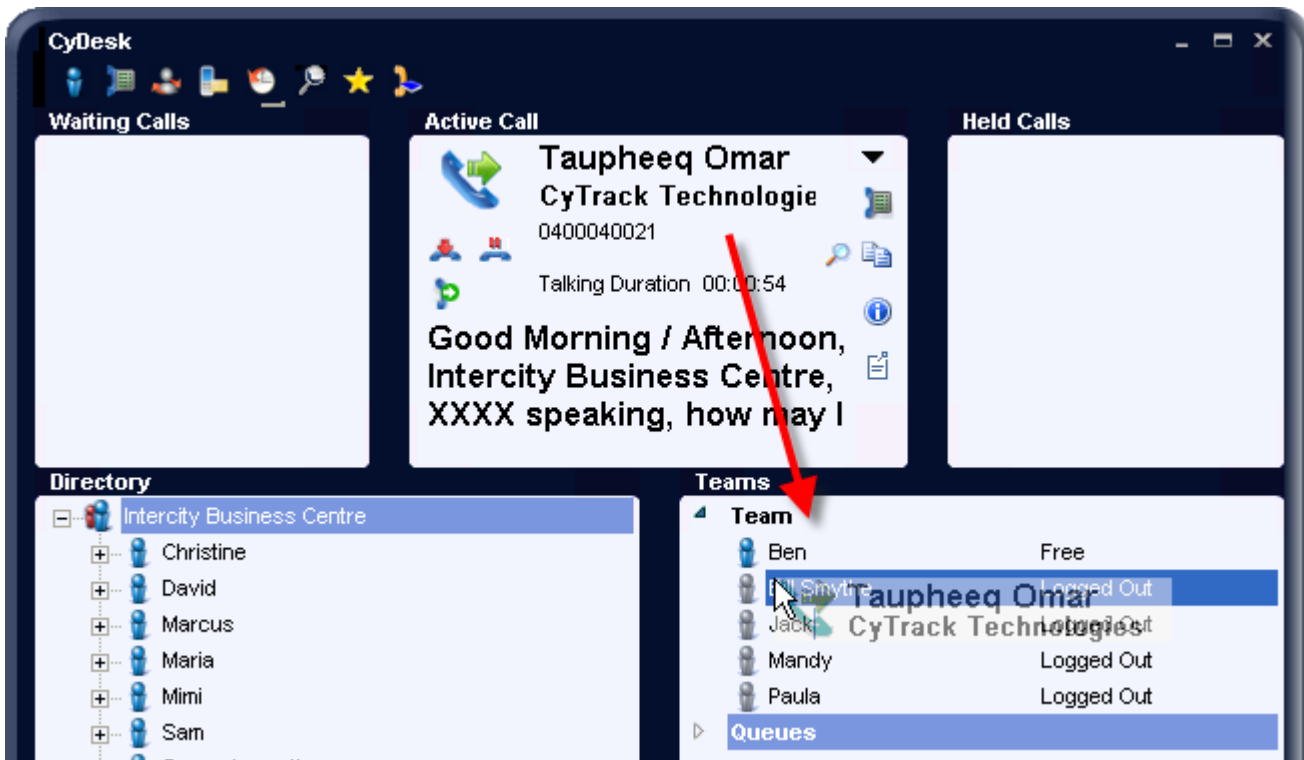
To answer the call click on the 'Answer'  button or answer the call in the normal way. To end the call, click the 'Hangup' button .

## Team

To view your 'Team' click on the team button 




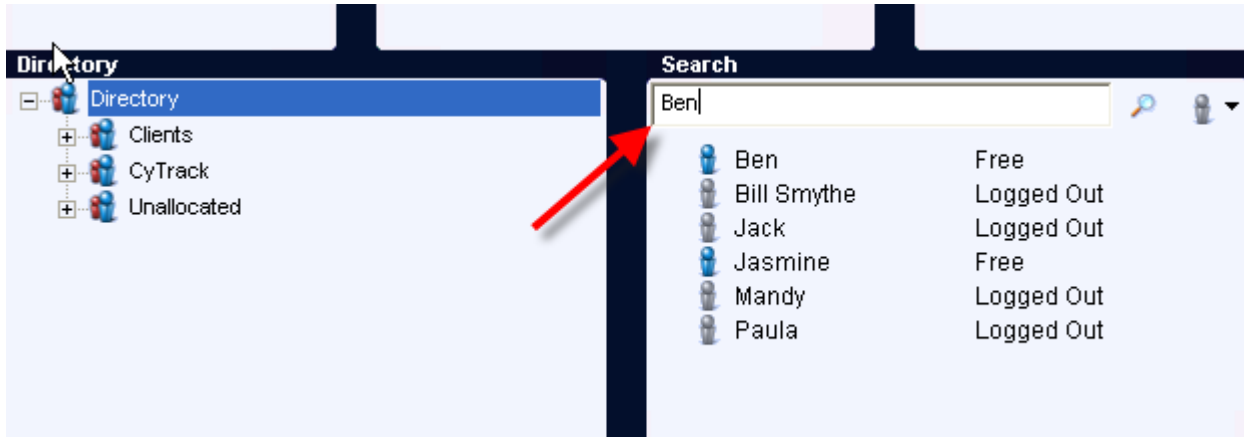
This will list the members of your team, and show their status. Any available team member can be called by double clicking on them.




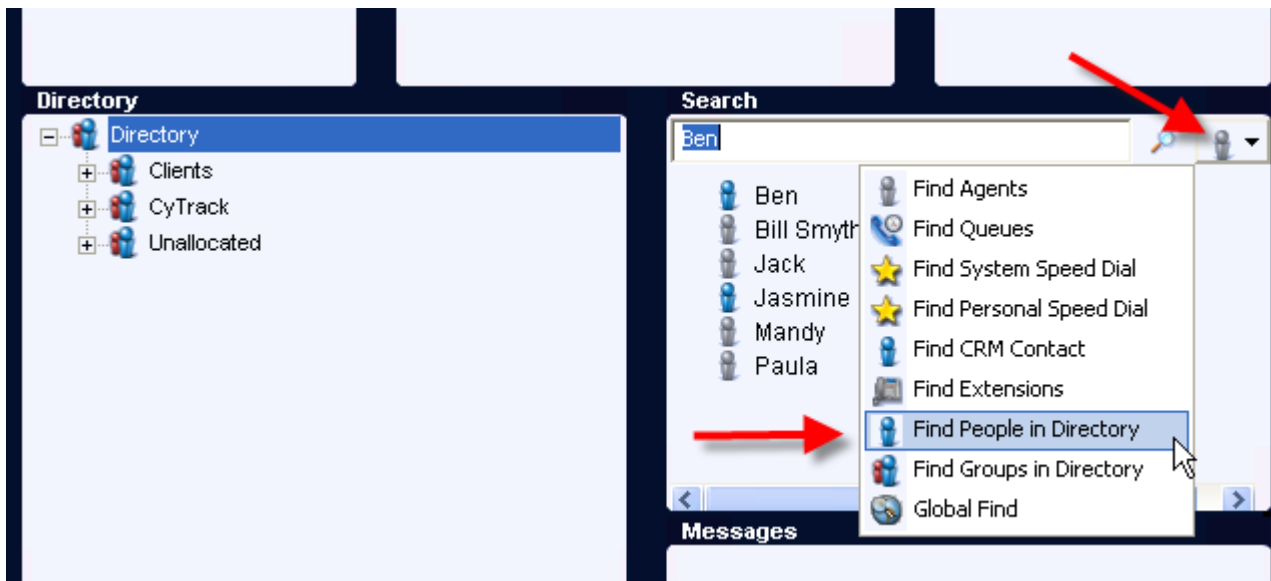
A call can be transferred to a team member by dragging the call in the 'Active Call' screen and dropping it on the team member. To add additional members to your team, drag the agent from the 'Search' screen on to your team.

## Search

The 'Search' screen allows you to find other CyDesk users who may or may not be in your team. It lets you view their status, as well as call them, transfer calls to them, add them to your 'team'. To view the 'Search' screen click on the 'Search' button  in the tool bar.



Type part or the entire name you wish to find and click on the Search button 




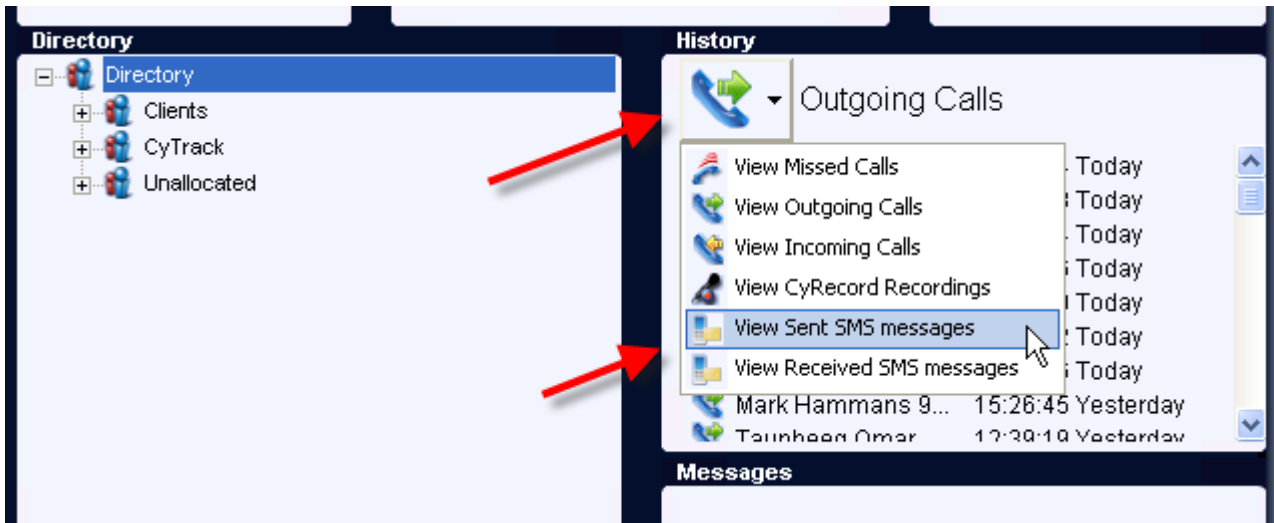
By clicking on the drop down menu, you may choose to also look for queues, system speed dials or personal speed dials

NB: Queues are only available as part of CyQ



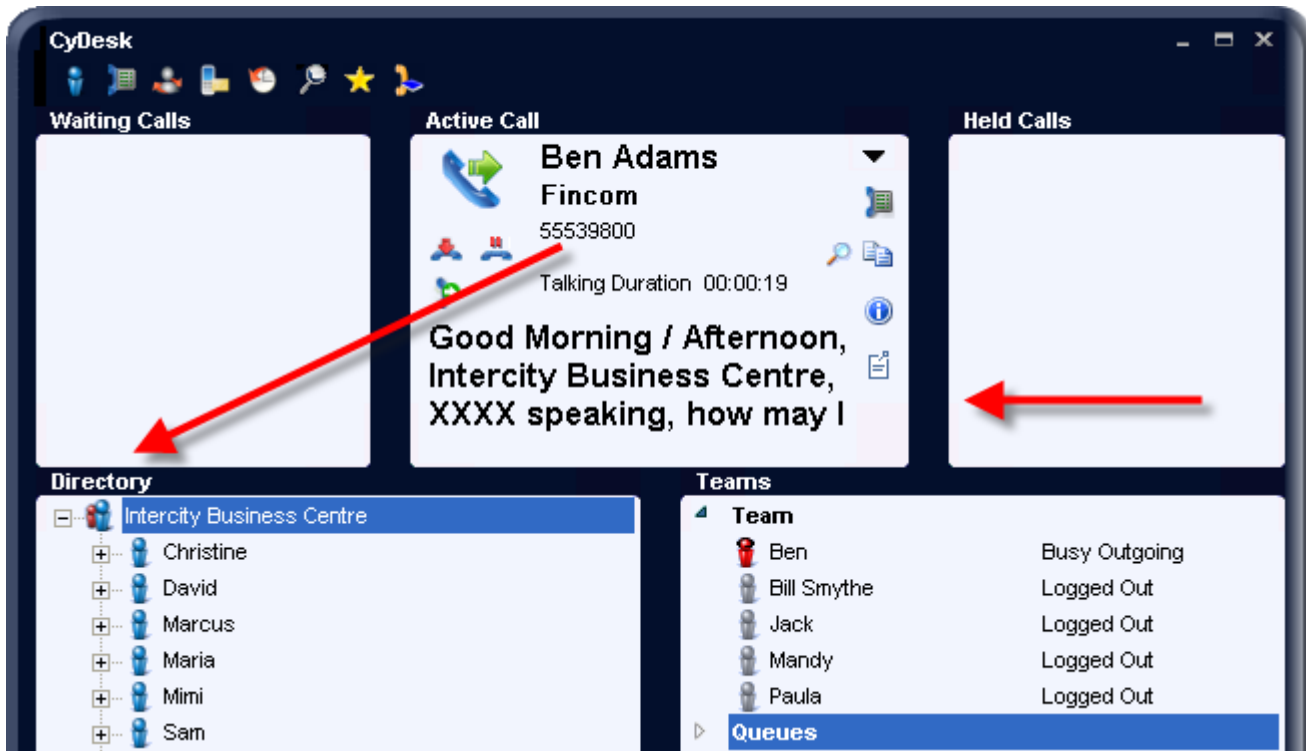
## History

The history of missed calls, incoming calls, outgoing calls, voice recordings and sent and received SMS messages is available by clicking on the history icon 

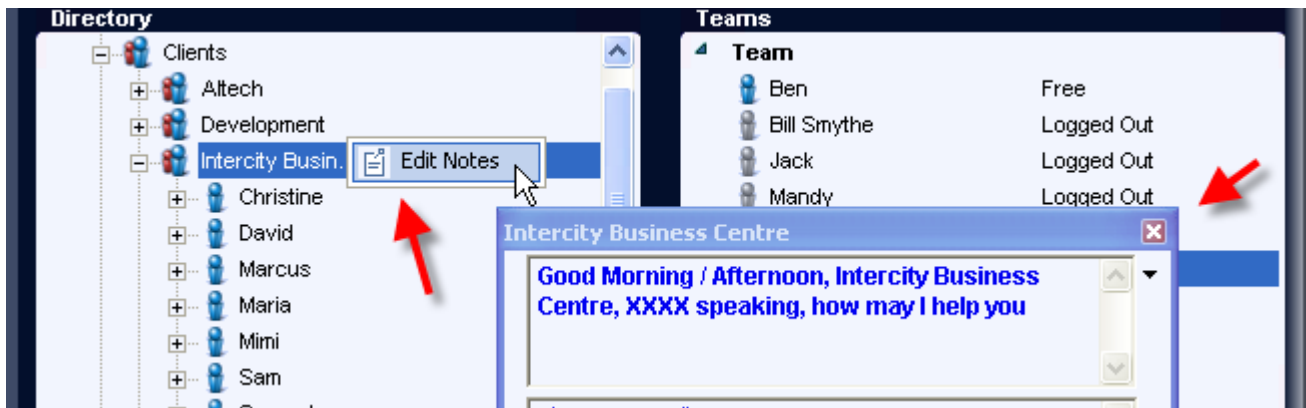


# Directory

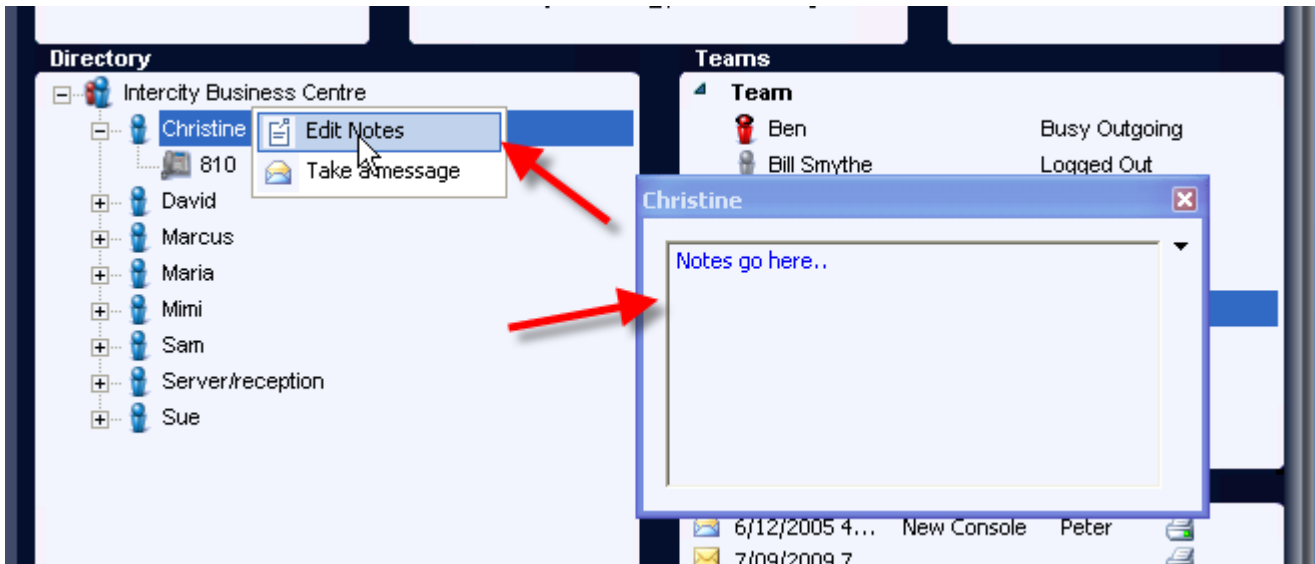
CyDesk Console incorporates CyReport Directory view for a full list of all clients and their contacts with the contact details. The Directory tab pops the applicable contacts list for a client when the applicable number is dialed.



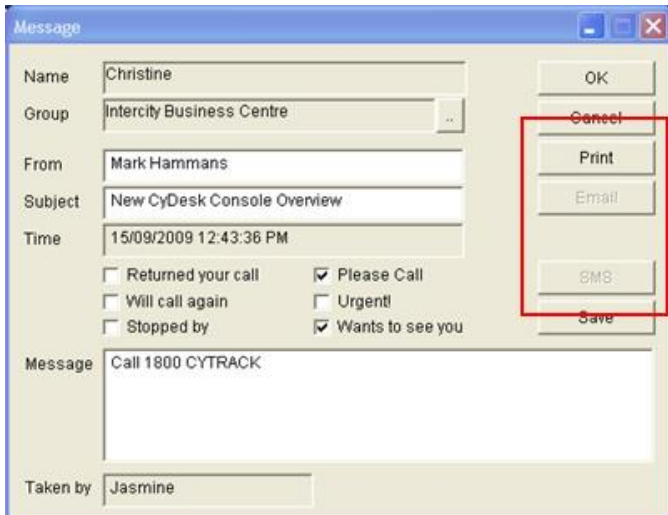
The Directory view can also be used to edit notes against an Account.



Or update daily notes against a person.



The Directory also allows users to send emails, SMS or Print by simply right clicking and selecting 'Take a message'. This option is best utilized while the agent is still on a call.



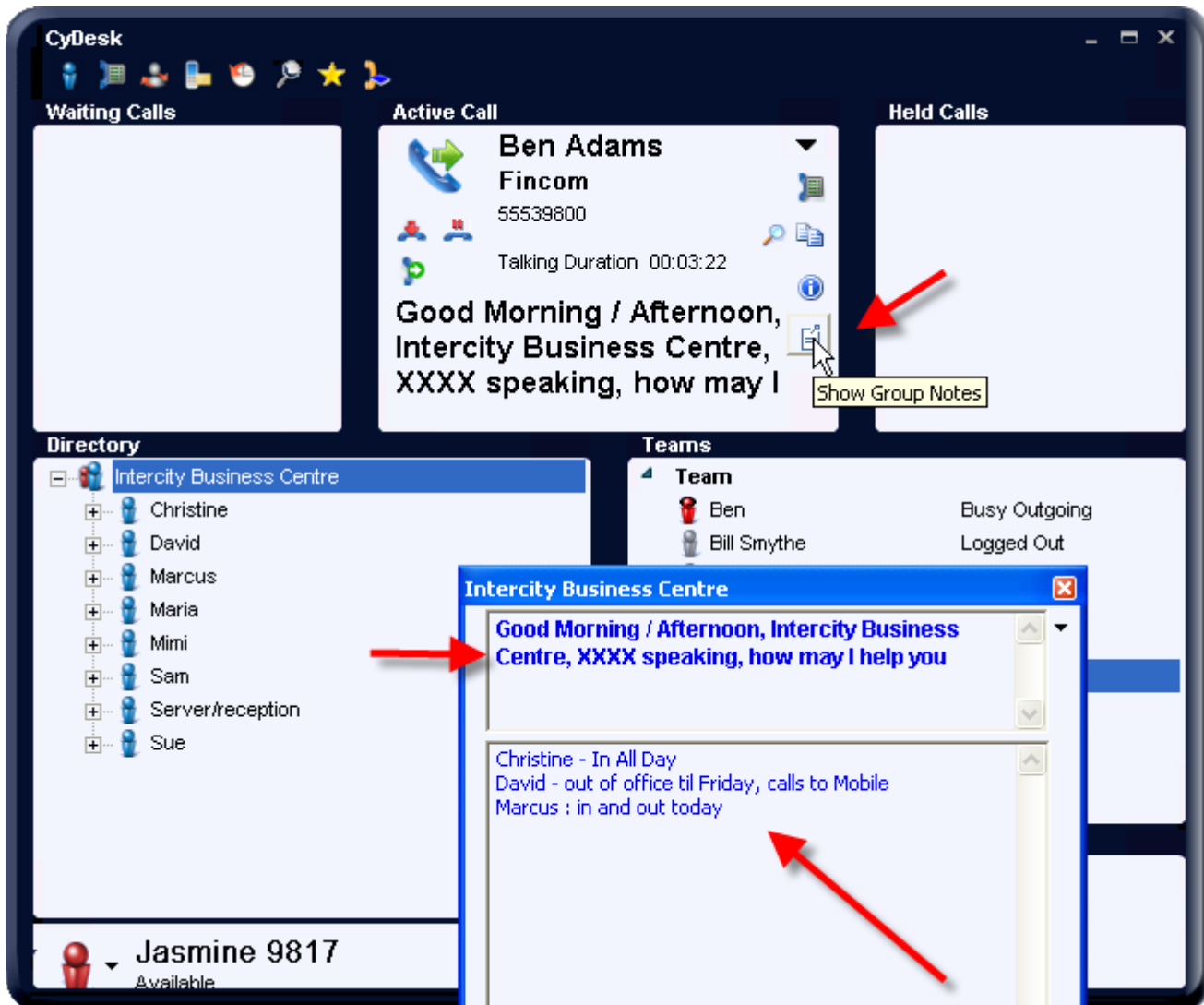
## Messages

Sent messages are stored under each contact for future view with icons depicting the method of message delivery used.



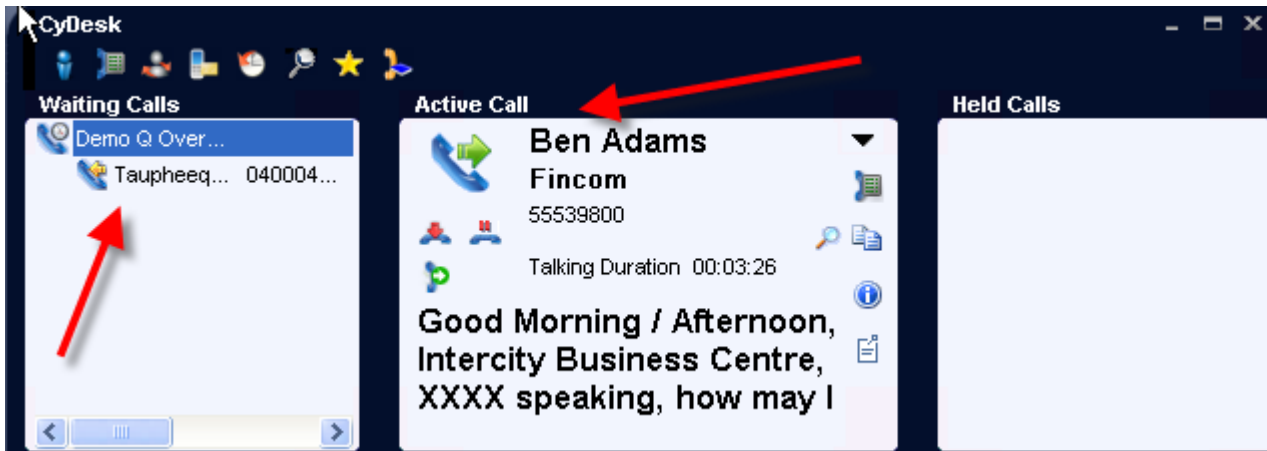
## Scripts and Notes

The Active call bar display the applicable answer script as setup against a client. The notes button on the 'Active Call' enables users to update the scripts and section for each client.

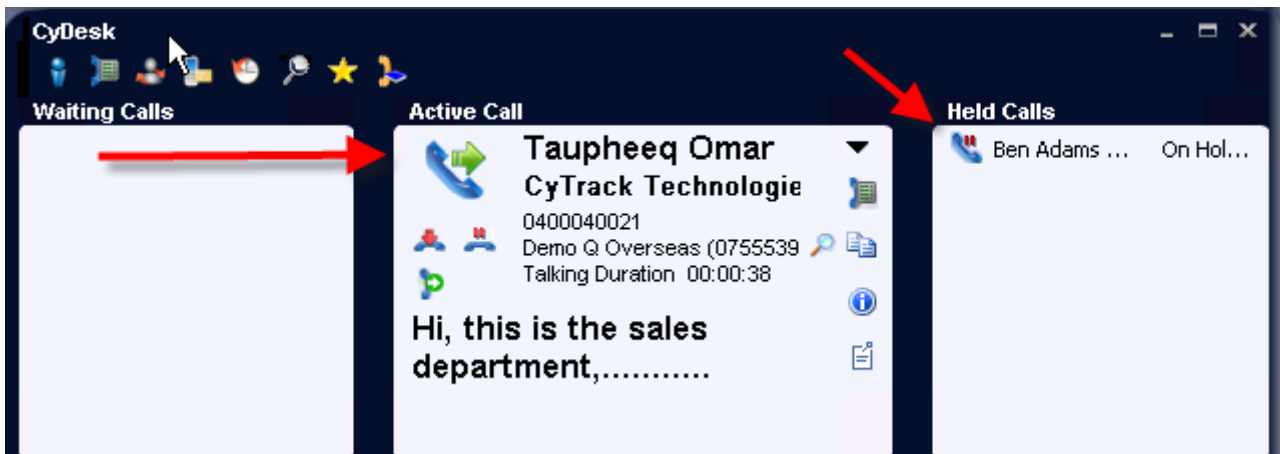


## Multiple Call Handling

The 'Waiting Calls' and 'Held calls' windows are used to handle multiple calls. If the agent is on a call, new calls will appear on the 'Waiting Calls' Window.



The second call can be answered by simply double clicking on the call in the 'Waiting Calls' window. This will put the current call on hold and answer the second call



The user can toggle between the various calls by simply putting the active call on Hold by pressing the hold button and double clicking on the call they wish to take.

