Step 1: Login to Cisco Finesse – Agents & Supervisors

1. Click open IE (internet explorer)
2. URL Field, if you are an agent it will display agent desktop, if you’re a Supervisor it will display the Supervisor dashboard.
3. Then press “Enter”
   (You will be redirected to the “Log On” Screen)

   ![Cisco Finesse Login Screen]

   1. ID = AD
   2. Password = AD
   3. Extension = Agent Line
   4. Then click “Sign In”

Step 2: You are now “Signed in”

   ![Cisco Finesse Signed In Screen]

   Important: Only open Cisco Finesse in a single Internet browser session.
   if you need to use a browser for the internet or other programs, open a new browser session.

Step 2: Changing Agent States

   - **Not Ready**
     Agent is “Not Ready” to take calls
     System places an agent in “Not Ready” when he/she logs on.

   - **Ready**
     Agent is “Ready” to take calls
     Calls are assigned 1st in, 1st out.
Step 3: Switching States

1. Click the “down” arrow
2. Click the state that you wish to switch to
   (An agent can switch states while connected to a call)

Step 4: Logging Off

1. Switch to “Not Ready”
2. Click “Sign Out” (if a reason is required, select the correct reason)
3. Close the window
Using the Finesse Telephony Toolbar - Answering/Disconnecting a Call

Click on the Answer button

Disconnecting a Call – Click the End Call Button

Using the Finesse Telephony Toolbar - Placing a Call on Hold/Retrieving

Click the Hold Button

Click to return to the call

Using the Finesse Telephony Toolbar - Placing a Call

1. Switch to “Not Ready”
2. Click “Make a New Call”

The dialer window opens up...

Dial the telephone number or extension.
(Using the number keys on the keyboard)

Then press “Enter”

When connected to a call, you will see...

Caller ID & Call Control Buttons
(Hold, Retrieve, Consult, Transfer, End)
Using the Finesse Telephony Toolbar - Announced Transfer
Ask party to hold...

1. Click  
2. Enter the extension, then press “Enter”  
   (Call is now on hold)
3. Announce your call, then press 

Using the Finesse Telephony Toolbar - Cancelling a Transfer
1st Call is on hold

2nd call is connected (to Voicemail)

Click  to “hang up” on the 2nd call

Click  to reconnect to the 1st call

Using the Finesse Telephony Toolbar - Blind Transfer (Non Announced)
Ask party to hold...

1. Click  
2. Enter the extension, then press “Enter” (Call is now transferred)

Using the Finesse Telephony Toolbar - Conference
Ask party to hold

1. Click  
2. Dial the outside number (or the extension), then press “Enter”  
   (Call is now on hold)
3. Announce your call, then click 
4.
Using the Finesse Telephony Toolbar-Keypad

Allows you to enter “Touch Tones” when connected to a menu driven system.
Example: Press “1” for Billing  Press “2” for New Accounts

Finesse Supervisor Dashboard

![Finesse Supervisor Dashboard Image]

Finesse Team Performance Real Time Display

![Finesse Team Performance Image]

1. Agent Name
2. State – Displays the current state for the agent, Ready, Not Ready, Talking
3. Time in State- The duration the agent is in state
4. Extension- Extension agent is using

Finesse Team Performance & Control Agent Features
A supervisor can control the time an agent spends in a state or monitor the agent’s activity

Change Agent States
1. Click on the Agent
2. Click on the State Button, example if agent is “Not Ready” You can make them “Ready”
To Monitor the Agent’s Call

1. Agent must be in a “Talking State”
2. Click Stat Monitor Button

Queue Statistics Display

<table>
<thead>
<tr>
<th>Queue Name</th>
<th># Calls</th>
<th>Max Time</th>
<th>Ready</th>
<th>Not Ready</th>
<th>Active</th>
<th>Wrap Up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>00:00:00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Queue Name—Name of the Queue

# Calls—Number of Calls waiting to be answered

Max Time—Oldest Call in Queue

Ready—Number of Agents in a “Ready” State

Not Ready—Number of Agents in a “Not Ready” State

Active

In—Number of Agents that are “Talking” on Inbound Calls

Out—Number of Agents that are “Talking” on Outbound Calls

Other—Number of Agents that are in that in between state (example Agent lifts handset dial tone is established however has not connected)

Wrap Up—Number of Agents Finishing with a Caller

Ready Pending—Number of Agents that will be placed in a “Ready State”

Not Ready Pending—Number of Agents that will be placed in a “Not Ready State”