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Introduction

Welcome to the MultiMedia Module iContact User Guide. iContact’s interface provides the tools to manage internal and external communications from a common platform, effectively and efficiently. All forms of contact, whether voice, e-mail, Chat, or Internet generated, arrive on the desktop with the information needed to deliver individualized, personalized service in all interactions. By simply pointing and clicking the appropriate icons, iContact provides access to all telephone and internet functions. iContact has been designed to fully integrate with Microsoft Outlook rendering learning to use iContact an intuitive, familiar experience, with on-line help always at hand.

How does it work?

On a typical day your organization is likely to receive an assortment of contact requests, each with its assigned response priority status. If you have a Web site no doubt you are fielding e-mail requests, inquiries or orders from the Web, and engaging in interactive chat sessions all in addition to the daily barrage of phone calls. iContact enables each workgroup to automate the management of its internal and external interactions according to predefined rules for contact handling.

In iContact’s blended multimedia environment, a group may only be assigned to handle e-mail contacts, while others may be tasked with e-mail, chat, and telephone responsibilities. Within groups, users can be assigned different priorities for contact handling, based on their skills and experience. When new contacts arrive, the system searches for the groups who possess the capabilities required for effective response. Routing criteria could include languages spoken, specialized knowledge, customer preferences, contact content, customer profile analysis, time of day, or other routing principles. When a contact is received, the system performs a query against the database and instantly retrieves the associated account information. iContact then notifies the queue of the new interaction’s arrival. In iContact’s blended multimedia environment, the system informs you of the number of contact requests for each media type awaiting processing. Once you select a contact from the queue it may be accepted or sent back to the queue for treatment by another member of the workgroup.

When a contact arrives on your desktop it comes complete with identification of the caller or sender, its source and relevant content. These tools enhance your ability to respond appropriately to every new interaction you receive.

iContact supplies a number of response options including the opportunity to preview a waiting contact before accepting. It provides choices for replying through different media types, e.g. you can receive a request by e-mail and reply by telephone. The program makes provision for rescheduling contacts for future handling and ensures timely follow-up. The outcome of each interaction is recorded for easy retrieval and trend analysis. It keeps you informed of the status of other members of your workgroup, furnishing options for internal collaboration through telephone, Chat and e-mail. iContact even announces new contact arrivals. All of this is accomplished through a single interaction management window. It eliminates dependency on single media interaction, making everyone in your organization multimedia enabled.

iContact adds intelligence to all your interactions, acting as a personal communications assistant residing on the desktop. Use it to:

- Manage your workload of callbacks and commitments.
- Give customers the option communicating in interactive or static modes with your organization.
- Create a reference record of your communications activities.
- Organize all your interactions on a single unified interface.
How this Guide is organized

This User Guide describes iContact communications management features and applications. The iContact User Guide is divided into five chapters following the Introduction.

- Describes the menus, toolbars, and windows that assist in the operation of the iContact interface.
- Describes the option/features that customize the iContact interface for personalized use. Explains how iContact performs has an internal communications vehicle within the workgroup of department.
- Outlines the steps for managing multimedia interactions.
- Explains how Outlook features are integrated into the iContact interface.

Who should use this guide

This iContact User Guide is intended for individuals who require a high-performance multimedia desktop communications management tool to assist them in managing their workload with respect to communicating with their contacts. This guide assumes a basic familiarity with PC systems and the Microsoft Windows 95/98/NT-WS (Workstation) environment.

Related documents

MultiMedia Module:
  Installation Guide
  Administration Manual

Document Symbols and Conventions

To help you locate and interpret information easily, this manual uses Microsoft set of Standard Windows terminology such as icon, window, text box and menu. Following are some specific symbols and conventions standard throughout the manual:

<table>
<thead>
<tr>
<th>Conventions</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Used to designate menu selections, buttons and commands to enter.</td>
</tr>
<tr>
<td>Initial Capitals</td>
<td>Names of applications, programs, files, servers, and named windows; and directory names and paths.</td>
</tr>
<tr>
<td><em>Italic</em></td>
<td>Information you need to provide.</td>
</tr>
</tbody>
</table>

Important! Before you Begin…

If you are installing and using the iContact module for the first time, you are required to setup the initial iContact Configuration properties. The configuration screen pops up by default the first time you start iContact (see page 5). Consult with your system administrator for details.
iContact Initial Configuration Setup

Introduction

The iContact Configuration properties enable the iContact module to initiate, connect, exchange information and communicate with other MMM complementary modules.

If you are installing and using iContact module for the first time, you are required to setup the initial iContact Configuration properties. The configuration screen pops up by default the first time you start iContact. You are to provide the requested information and fill in the appropriate boxes.

Configuration Properties Menu

The Configuration Properties window provides a selection of features that assist you in setting up the iContact module. The configuration information can be modified per request. To view your Property settings, follow the instructions below:

1. Select iConfig from the Windows start menu
2. Click the tab that contains the property you wish to view
3. Enter or modify the requested information
4. Click Save to accept new setting values or Close to keep current settings

<table>
<thead>
<tr>
<th>Configuration Properties</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>iServer</td>
<td>Displays location where MMM iServer is installed</td>
</tr>
<tr>
<td>Telephony</td>
<td>Displays current Telephony connection values</td>
</tr>
</tbody>
</table>

Note: Database, iServer, and Telephony (if applicable) are required configuration properties to setup iContact module.

iServer Property settings

The iServer settings display your current server settings. The first time you run the program you need to provide the application with these parameters. Enter new values or modify the current settings. The System Administrator should provide server name.

1. Enter Default server name.
2. Enter Backup server name. Leave blank, as it will be available in next release.
3. Click Save to update new values or continue setting up the rest of the feature properties before saving and closing the menu.

The new server values become the current iServer values in the Configuration menu.

<table>
<thead>
<tr>
<th>iServer Properties</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Displays the computer name where the iServer is installed.</td>
</tr>
</tbody>
</table>
Telephony Property Settings

The telephony settings display your current telephony connection values. The first time you run the program you need to provide the application with these parameters. Enter new values or modify the current settings.

1. Enter position ID for ACD(extension) and the appropriate password
2. Enter outbound dial Prefix
3. Click Save to update new values or continue setting up the rest of the feature properties before saving and closing the menu.

The new information becomes the current values in the Configuration menu.

<table>
<thead>
<tr>
<th>Telephony Properties</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directory Number DN</td>
<td>Meridian switch DN</td>
</tr>
<tr>
<td>Position ID for ACD</td>
<td>Telephone extension connected to telephone switch ACD (part of ACD pool group)</td>
</tr>
<tr>
<td>Outbound Dial Prefix</td>
<td>External dialing prefix (if required)</td>
</tr>
</tbody>
</table>
Using iContact

Introduction

When logging on to the system, the iContact screen appears on the workstation desktop. iContact transforms the workstation into a data communications terminal providing access to both customer information and the ability to initiate and receive contacts. The icons in the Vertical Icon bar show what multimedia queues you are able to receive interactions from, i.e. telephone, Internet, e-mail, chat and Proactive Campaign. These may vary from one user to another (configuration dependant). The iContact interface includes all basic telephone functions such as dial, answer, hold, transfer and conference. The telephone set at your workstation can provide backup in case of a service disruption to your computer. iContact is designed for use with a headset that is plugged into the telephone set.

Starting iContact

You can make a shortcut to iContact program on the desktop, to make the connection to the program easier. Otherwise, you can access it from your Windows Start menu.

Select **iContact** from Windows Start menu, or double click the **iContact** icon on the desktop.

Logging on to iContact

The Login Screen provides a single step for logging on to iContact interface as well as the telephone set assigned to the PC. iContact will read your ID number from your PC and provide you with a login screen. Follow the steps below to login:

1. Choose an e-mail profile.
2. Click **OK**.

**Note:** If a problem arises in connecting you to iContact, review the login screen list to identify where the connection failed. Contact your administrator to review the PC software installations or restart the login process.

Exiting iContact

Choose **Exit** from the File menu, or click the **Close** Window icon in the top right corner of the interface.

**Note:** Before restarting iContact please wait until all processes related to iContact are shut down.
Introduction to the iContact Interface

The iContact interface displays multimedia contacts waiting in queue for treatment and the tools required to respond to those contacts.

Multimedia contacts appear in the Inbox. Contacts can be identified as to type of media, sender, time of arrival and content. When a contact is selected for response, the corresponding Content Window opens up providing the detailed contact information required for intelligent contact handling.

The icons and menu commands enable you to view information and perform common tasks including dialing, follow up rescheduling, accepting and rejecting contacts.

Menu bar

The Menu bar provides access to 3 menus:

File Menu

<table>
<thead>
<tr>
<th>Commands</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Brings up Outlook e-mail, contact address book, task list, and calendar appointments features.</td>
</tr>
<tr>
<td>Request</td>
<td>Provides the next contact for response treatment.</td>
</tr>
<tr>
<td>Accept</td>
<td>Opens the selected contact for treatment.</td>
</tr>
<tr>
<td>Reject</td>
<td>Rejects the selected contact and returns it to the queue.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the current contact with a selected interaction result.</td>
</tr>
<tr>
<td>Exit</td>
<td>Exits the iContact interface ending the program.</td>
</tr>
</tbody>
</table>

View Menu

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Tool Text</td>
<td>Hides/Shows toolbar icon descriptions.</td>
</tr>
<tr>
<td>Properties</td>
<td>Properties define the various modes in which you handle media contact requests and view activities within your workgroup in iContact.</td>
</tr>
</tbody>
</table>

Help Menu

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>Provides access to on-line Help.</td>
</tr>
<tr>
<td>About</td>
<td>Provides MMM Software information</td>
</tr>
</tbody>
</table>
Toolbar

The Toolbar provides buttons/icons to perform contact interaction activities. The buttons on the left hand of the screen are common to all contact forms. The icons to the right are designed for dialing and answering telephone calls. Most toolbar buttons correspond to a menu command.

<table>
<thead>
<tr>
<th>Command</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready / Not Ready</td>
<td>The icon on the top left corner of the toolbar indicates user status. The green check mark means you are available to take contacts (Ready status). The red sign indicates your status as Not Ready and unavailable to take contacts.</td>
</tr>
<tr>
<td>Request</td>
<td>The system gives you the next contact of any media type waiting in queue.</td>
</tr>
<tr>
<td>Accept</td>
<td>Accepts the selected contact for response.</td>
</tr>
<tr>
<td>Reject</td>
<td>The system returns the current contact to the waiting queue.</td>
</tr>
<tr>
<td>Follow up</td>
<td>Reschedules any unfinished contact request for future follow-up. You can reschedule the follow-up to yourself or to the workgroup to which you belong for a specific date and time. Follow-up closes the call and makes you available to take contacts.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the current contact with a selected Interaction Result, allowing you to take next incoming contact.</td>
</tr>
<tr>
<td>Hold/Unhold</td>
<td>Allows you to temporarily put a contact request on hold. (Telephone ACD call only).</td>
</tr>
<tr>
<td>Answer/Dial/ HangUp</td>
<td>Answers a call, or dials a number appearing in the Phone Number field, and hangs up to disconnect.</td>
</tr>
<tr>
<td>Fast Transfer</td>
<td>Transfers a call to another user or to a contact queue. (Telephone only)</td>
</tr>
<tr>
<td>Conference Call</td>
<td>Conducts a conference session with other users on the system, supervisors, or outside callers.</td>
</tr>
</tbody>
</table>
Vertical Icon bar

The Interaction Suite allows you to receive and respond to contacts from a variety of media types. Icons represent each media type that you have been assigned to handle. You may be assigned to a single or multiple media queues. The number of requests waiting in each media queue appears in parenthesis under each media icon. The numbers change dynamically reflecting the current number of incoming and answered contact requests.

<table>
<thead>
<tr>
<th>Icons</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephony</td>
<td>Displays the number of telephone calls from the public switch network (PBX) waiting in the Telephony queue.</td>
</tr>
<tr>
<td>WWW</td>
<td>Displays the number of contact requests originating from the World Wide Web and submitted from a form on the Web site.</td>
</tr>
<tr>
<td>E-mail</td>
<td>Displays the number of e-mails currently waiting in the queue.</td>
</tr>
<tr>
<td>Chat</td>
<td>Displays the number of requests for chat sessions currently waiting in the queue.</td>
</tr>
<tr>
<td>Proactive Campaign</td>
<td>Displays the number of outbound calls currently waiting in the queue.</td>
</tr>
<tr>
<td>Team members</td>
<td>Opens the Internal Collaboration window of logged on team members in the group or groups you are mapped to.</td>
</tr>
<tr>
<td>Outlook</td>
<td>Opens the integrated Outlook features.</td>
</tr>
</tbody>
</table>

Status bar

The Status bar displays real time status information. You can monitor your preview time, interaction time, status, and mode.

<table>
<thead>
<tr>
<th>Preview Time:</th>
<th>Ready: Yes:</th>
<th>Interaction Time:</th>
<th>Mode: AutoRequest:</th>
<th>Phone State: On Hook:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Modes</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview Time</td>
<td>Displays the time remaining in which you are allowed to preview the current contact request. Count down begins when a contact is selected. When the preview time drops to zero, the contact is automatically rejected and is returned to the queue.</td>
</tr>
<tr>
<td>Ready Status</td>
<td>Displays your current status as Yes (for Ready) or No (Not Ready). If in Not Ready status, you are either temporarily unavailable, treating other contact requests or you have manually put yourself in the Not Ready status. You may also check for your ready status by looking at the Ready/Not Ready button on the Menu bar (see page 9).</td>
</tr>
<tr>
<td>Interaction Time</td>
<td>Displays the time in hours, minutes and seconds in which you are engaged in handling a contact. The timer begins counting when the contact is answered and ends when the contact is terminated.</td>
</tr>
<tr>
<td>Mode (Selective or Request)</td>
<td>Displays the mode in which you are currently engaged: either Request or Selective. For definition of Request and Selective modes, refer to User Properties, Selective/Request modes.</td>
</tr>
<tr>
<td>Phone State</td>
<td>Displays the status of your telephone line.</td>
</tr>
</tbody>
</table>
**Inbox**

This window displays information regarding the contact requests waiting for treatment for each media type assigned to you. The Inbox displays media type, sender, arrival time, content and phone number, if provided. The fields vary from one contact media to another. The inbox shows either a single or multiple records depending on the contact mode that has been selected. In the example below, information is provided on records currently waiting in the e-mail contact media queues.

<table>
<thead>
<tr>
<th>ID</th>
<th>Media Name</th>
<th>Received</th>
<th>Contact Name</th>
<th>Customer</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>316</td>
<td>Techemail</td>
<td>01/02/2000 04:43 PM</td>
<td>Tracy</td>
<td>N/A</td>
<td>n/a</td>
</tr>
<tr>
<td>317</td>
<td>Sales email</td>
<td>01/02/2000 04:43 PM</td>
<td>Tracy</td>
<td>N/A</td>
<td>n/a</td>
</tr>
<tr>
<td>318</td>
<td>Sales email</td>
<td>01/02/2000 11:51 AM</td>
<td>Tracy</td>
<td>N/A</td>
<td>follow up test</td>
</tr>
<tr>
<td>321</td>
<td>Sales email</td>
<td>01/02/2000 11:56 AM</td>
<td>Tracy</td>
<td>N/A</td>
<td>The latest</td>
</tr>
<tr>
<td>310</td>
<td>Sales email</td>
<td>01/02/2000 11:56 AM</td>
<td>Tracy</td>
<td>N/A</td>
<td>Info 2</td>
</tr>
</tbody>
</table>

**Media Status**

As iContact is a workgroup enabled application you may be sharing interaction management responsibilities with other members of your team.

The left hand column contains icons that depict the current treatment status of an interaction. An explanation of each status appears below:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed Envelope (Yellow)</td>
<td>No other users have touched interaction. Available for response.</td>
</tr>
<tr>
<td>Envelope Open. (White background)</td>
<td>Another user has opened interaction.</td>
</tr>
<tr>
<td>Envelope Open. (Yellow background)</td>
<td>Interaction you are opening.</td>
</tr>
<tr>
<td>Red Flag</td>
<td>Denotes a contact that has been rescheduled and is not yet due. The contact cannot be opened until it is due.</td>
</tr>
<tr>
<td>Blue Flag</td>
<td>Denotes a contact that has been rescheduled and ready to be processed.</td>
</tr>
<tr>
<td>Envelope Flap Red</td>
<td>Interaction has been handled and closed by you or another user. Screen has not been refreshed.</td>
</tr>
<tr>
<td>People Icon</td>
<td>Interaction you have accepted, currently in progress.</td>
</tr>
</tbody>
</table>
**Preview Window**

When you double click on a contact record, the Preview Window displays the details related to the content. You are able to preview an unlimited number of contacts before accepting the contact for treatment.

![Previews Window](image)

<table>
<thead>
<tr>
<th>ID</th>
<th>Queue Name</th>
<th>Received</th>
<th>Contact Name</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EmailSales</td>
<td>15/04/2003</td>
<td>Administrator@</td>
<td>test1</td>
</tr>
</tbody>
</table>

---

**Content Window**

When a contact is selected, this window displays details for contact. For example:

- On an incoming e-mail, the e-mail message appears in its entirety and includes a section for composing a response.
- On a Web callback request, you can view the text message as well as the URL for the page from which it was sent.
- On a chat session, both sides of the dialogue appear in the Content Window.

![Content Window](image)
After logging into your iContact screen, you should review your User Properties to understand how the interface is configured. In the View Menu, the Properties screen takes you to two tabs: User Properties and Genie.

In addition, iContact makes provision for you to view the status of other members of your workgroup. You can engage in internal communications via phone or text chat, or e-mail with other group members.

Viewing the Properties Menu

The Properties window provides you with a selection of features that assist you in multimedia contact handling. This window allows you to view current settings for User and Genie features. To review your Properties settings you must be in Not Ready Status.

1. Click View from the Menu Bar.
2. Choose the Properties option from the dropdown menu.
3. Click the tab you wish to view:

<table>
<thead>
<tr>
<th>User</th>
<th>Provides a range of options of how you interact with the iContact interface and manage contacts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genie</td>
<td>Provides update notification of user and workgroup login status, and new contact arrival to your iContact interface.</td>
</tr>
</tbody>
</table>
User Properties settings

Take the time to familiarize yourself with your User Properties settings. If a field setting is enabled, you have the option to turn it on, by checking the appropriate box. Or you can turn it off, by removing the check mark from the corresponding box. If any setting is disabled, you have not been granted the right to change the settings. The following is a description of User Property functions and how they impact contact handling procedures.

<table>
<thead>
<tr>
<th>User Property settings</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Dial</td>
<td>The system auto-dials a phone number for the contact that you have selected. The phone number appears in the phone number field on the toolbar. If this property is not checked, you must manually click the Dial button to place an outbound call.</td>
</tr>
<tr>
<td>Auto Accept</td>
<td>The system automatically opens the contact request in sequence. If Auto Accept is not checked, you must manually accept or reject the contact.</td>
</tr>
<tr>
<td>Auto Accept DN</td>
<td>The system automatically answers calls coming into a secondary line. If the box is not checked, you are required to answer manually. (Disabled).</td>
</tr>
<tr>
<td>Log Outlook Journal</td>
<td>Logs the contents of the entire interaction in the Journal including Comments and Follow-up reasons.</td>
</tr>
<tr>
<td>Selective Mode</td>
<td>In Selective mode, you have the liberty to review requests from any media queue before selecting a contact for response</td>
</tr>
<tr>
<td>Preview</td>
<td>Preview time displays the allowable time to preview a contact request prior to acceptance. If this field is enabled, you can click the arrow buttons to change the length of the preview interval. In Auto Accept mode incoming contacts require immediate attention. The Preview time is set to “0”.</td>
</tr>
<tr>
<td>Request Mode</td>
<td>In Request mode, you are presented with one contact request at a time. The system will provide the contact with the highest media priority.</td>
</tr>
<tr>
<td>Auto Request Every</td>
<td>This field specifies the time interval between receiving contacts when operating in Auto Request mode and if Auto request is checked. After you close a contact, the system waits the specified number of seconds before providing you with another contact request. If this field is enabled, you can click the arrow buttons to change the length of the interval.</td>
</tr>
</tbody>
</table>
**Genie Properties settings**

The Genie is a customizable feature that provides visual and audio notification of new events. The Genie can be set to announce the arrival of contacts on the desktop and keep you informed as to when various users log into the system. Use the checkbox feature to customize the Genie to display only the information you wish to have on view, or to disable the Genie altogether.

<table>
<thead>
<tr>
<th>Property Settings</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Genie</td>
<td>Displays/Hides the Genie.</td>
</tr>
<tr>
<td>Let Genie Talk</td>
<td>Provides audio announcements of events if the workstation is equipped with soundcard.</td>
</tr>
<tr>
<td>Let Genie Announce All User Logins</td>
<td>Provides visual and audible announcement of user logins.</td>
</tr>
<tr>
<td>Let Genie Announce CallEntered Queue</td>
<td>Provides visual and audible announcement of a call arriving in the queue.</td>
</tr>
<tr>
<td>Let Genie Announce Offered Contacts</td>
<td>Provides audio and visual notification of the arrival of new contacts in Request mode.</td>
</tr>
<tr>
<td>Let Genie Announce Internal Messages</td>
<td>Provides notification of the arrival internal messages from team members.</td>
</tr>
</tbody>
</table>
Outlook Properties Setting

The Outlook screen is used to provide the contact information after the contact is offered and accepted by the iContact user. The contacts are retrieved from the Outlook contacts list that normally is in the Exchange public folders. For the Telephone, Web Callback and Proactive calls the search key is based on Caller ID or Telephone number and for Email calls the search is based on the sender's Email address. The Outlook Property Settings are described in the following table:

<table>
<thead>
<tr>
<th>Property Setting</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Outlook Search</td>
<td>Check to Enable Outlook Search and uncheck to disable the Outlook Search</td>
</tr>
<tr>
<td>Contact Folder</td>
<td>Click on the button to select the Outlook contact list that is used for search. In an enterprise configuration, normally the contacts list resides in the Outlook Public Folder and is available to all clients. The Agents who want to enter the contact history in the popped-up contact screen, should have the proper access rights to the contacts list from the Public Folder.</td>
</tr>
<tr>
<td>When searching show:</td>
<td></td>
</tr>
<tr>
<td>First Hit</td>
<td>If First Hit is checked, the first matching record pops-up. If All hits is checked, all matching records (based on search fields) will be offered in a list and the iContact user can select the proper contact from the list.</td>
</tr>
<tr>
<td>All Hits</td>
<td></td>
</tr>
<tr>
<td>Create new contact when search fails</td>
<td>If checked and no matching record is found, a new contact screen will pop-up and the iContact user can enter the contact information and save the new contact in the contacts list (proper access rights are required).</td>
</tr>
<tr>
<td>Search on the following fields:</td>
<td>Each listed filed represents one information field in the Outlook Contacts list. The search will be executed on the selected search keys.</td>
</tr>
<tr>
<td>Home Phone</td>
<td></td>
</tr>
<tr>
<td>Business Phone</td>
<td></td>
</tr>
<tr>
<td>Cell Phone</td>
<td></td>
</tr>
<tr>
<td>CallBack Number</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
</tbody>
</table>
Internal Collaboration Features

Viewing Team Member Status

iContact furnishes the means to communicate with other members of your workgroups. When you are required to transfer a call to another member, you can check to see if the individual is engaged in other contact activities or is available to answer prior to sending it through. You also have the ability to send text messages to another team member even when he/she is busy handling a contact. You can make internal phone calls. You can also send e-mail internally. Before you take a break, you should check the status of other team members to ensure there is adequate coverage for handling the current volume of contacts.

1. Click the Team Members icon on the Vertical Icon Bar. The icon displays the number of team members currently logged on to the system. The Team Member Window opens in the Contact Window.

2. An icon displays the status of agents as follows:
   - Logged-on and available
   - Logged-on but busy/unavailable
   - Logged off.

3. Right click on the team member’s icon you want to contact. A menu appears allowing you to select from any of the enabled collaboration media.

4. Click the Team Members icon again to close the window.

Making an Internal Phone Call

You can use the internal phone collaboration feature to make a telephone call to a member of your workgroups.

1. Click the Team Members icon to view the status of work group members.

2. Select the team member from the Team Member Window. If he/she is available, right click on the name. A pop up menu will appear.

3. Click Make a Phone Call on the pop-up menu. You will be connected to the team member.

4. Click Hang-up to disconnect.

5. Click the Team Member icon to close the window.
Sending an Internal Memo

iContact supports internal chat among team members. You have the option of chatting with an individual team member, all the members of your group or everyone who is logged on to iContact.

1. Click the **Team Member** icon to view the status of workgroup members.
2. You will only be able to send a chat request if there are other members logged on in your group. Select a member and right click on the **name**.
3. Click **Send an Internal Message**.
4. From the radio button options, choose **Selected User**, **Users in my Group** or **Everybody** to send an internal message.
5. Enter a message in the Send text box. Click **Send**.
6. The reply will appear in the upper text box identified by the name of the individual with whom you are chatting.
7. You may use the **Clear** button to clear text.
8. Click **Close** to end the chat session.
Sending Internal e-mail

You can send internal e-mail correspondence without having to log out of the iContact application.

1. Click the **Team Member** icon to view the status of workgroup members.
2. Select a group member from the team member window and right click on the **name**.
3. Click **e-mail** from the pop-up menu.
4. The recipient's internal e-mail address will appear in the **To:** field.
5. Compose the e-mail message.
6. Click **Send**. The e-mail will be directed to the team member's mailbox for retrieval.
Multimedia Contact Handling

Introduction

This Section delves into the methods by which you can manage your inbound and outbound contacts. iContact is designed to supply both current and historical data with the contact so you can respond knowledgeably and personally to different requests. Furthermore, iContact offers several different options for contact handling.

Contact Handling Procedures

Regardless of media interaction type, handling a contact incorporates steps that include selection and acceptance, reviewing information, responding to the request and ending the call. Be sure to check your User Properties to confirm the operating mode you are in before responding. During the time you are treating a contact you are in Not Ready status and will not receive any new contact requests until the current one is completed. However, internal phone calls and internal E-mails directed to your extension will still be available.

<table>
<thead>
<tr>
<th>Action</th>
<th>Agent status after action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview timeout</td>
<td>Not ready</td>
</tr>
<tr>
<td>Reject the call</td>
<td>Ready</td>
</tr>
<tr>
<td>Accept, then close the call</td>
<td>Not ready</td>
</tr>
<tr>
<td>Accept, then follow up the call</td>
<td>Not ready</td>
</tr>
</tbody>
</table>
Request Mode

In Request Mode, all contact requests will arrive on the desktop as single entries, in the order in which they have been received and according to the priority assigned to the media type. For example, you may be assigned to respond to both chat and e-mail requests. Since a one-to-one chat request assumes there is a sender waiting for response, chat requests may take priority over e-mails. Therefore, the system will send notification of the chat request and resume sending e-mails only when there are no chat requests waiting in the queue.

When working in Request Mode refer to your User Properties. If the Auto Request Every checkbox is checked, you will automatically receive contact requests at the designated interval (for example, 10 seconds after completing the previous contact). If the box is not checked, new contact requests will arrive in your inbox only when you click the Request button on the toolbar.

Contact Handling

2. If the auto-accept mode is enabled, there will be no preview time. The contact will be automatically delivered to your desktop. Interaction time will begin running as soon as the contact appears on the screen.
3. If auto-accept is not enabled, click Accept on the Toolbar or File menu to accept the contact. Interaction time will begin running when the contact is accepted. If you do not accept within the defined preview parameters, the contact will be returned to queue. Or click Reject to send it back to the queue.
Selective Mode

In Selective mode you have total discretion as to when and how you want to respond to media requests arriving in different queues. You may select contacts from any queue on your desktop. When you click the Media Icon of the media type you wish to review, a list of all the media waiting in that queue will appear in the Inbox.

Note: Inbound telephone calls take priority over all other incoming media and therefore “jump the queue.” Telephone calls must be answered before handling contacts from other media queues.

Contact Handling

1. Double-click to highlight the record you want to view prior to accepting. (If Auto Accept is enabled, you will automatically receive the contact for treatment.) Details for the highlighted contact appear in the Contact Preview Window.

2. Click Accept on the File menu or Toolbar to accept the request. Once accepted, the Content Preview Window will open. The system begins computing Interaction Time. The timer continues to run until the contact is closed. Or, click Reject to send the contact back to queue.

3. If you have not accepted within the defined Preview parameters, the contact is returned to the queue.

Note: Selective mode is not valid for telephony. This means that if the agent has more than one telephony call waiting in the queue, only the information relating the call in process will be displayed on the screen. Accept and reject buttons are not available for telephony calls. Also there would be no preview time counting down for telephony calls.
Follow-up

After handling an interaction, you have two choices for closing a contact: Follow-up and Close. If you want to reschedule a contact for follow-up to yourself or another member of your workgroup, you may utilize the Follow-up icon on the Toolbar. For example, you may have reached the correct residence but the wrong party. Or, the individual you called may find it inconvenient to speak with you and suggests a better time to continue the conversation. The option allows you to provide a reason for the callback in addition to the selection of a date and time. You can also create a New Outlook Task as a reminder. Rescheduling an inbound telephone call cannot be accessed through the Follow-up feature. You must create an Outlook Task as a reminder.

**Note:** The system generates automatic rescheduling on Proactive Campaign calls when these Interaction Codes are selected: busy, no answer, answering machine, fax machine and modem. It is not necessary to access the Follow-up option to reschedule in those circumstances.

Rescheduling a Contact

1. Click the **Follow-up** icon on the Toolbar, causing a dialog box to open.
2. Select an **Interaction Result** from the dropdown menu options.
3. Select a **date** from the Calendar.
4. Select a **time**.
5. Choose to reschedule **For Myself** or **For My Team** by clicking the appropriate radio button if in Request mode. In Selective operation mode, the callback will be routed anyone in the workgroup.
   **Note:** You may click Create Outlook Task as a reminder to yourself. This will bring up New Task window.
6. Click OK. This will close the contact for you and make you available to handle another contact.
7. The rescheduled contact will appear in the Inbox in which the original contact was received. It will be identified by a red flag on the envelope prior to the response deadline and cannot be opened. The red flag turns blue when the rescheduled time has been reached, signaling that it is available for handling.

Rescheduling a Telephony Call

1. Prior to closing the call, click **New Task** on the File Menu.
2. Enter the relevant caller information in the body of the Outlook Task form, including the phone number. Check the **Reminder** button and enter the **time**.
3. Select **Close** from the Task Bar and close the call.
4. The reminder message will pop at the appropriate time.
Closing a Contact
If there is no requirement to mark a contact for follow-up you can select Close to close the current contact. This option requires that you enter an Interaction Result from the list provided. Interaction Results are specific to media types. Once you have coded the result, you have the option to enter a comment. You can also use this feature to enter comments that can be retrieved in the Outlook Journal.

1. Click the Close icon on the Toolbar causing a dialog box to open.
2. Select an Interaction Result from the list, by clicking the checkbox beside it.
3. To enter a comment, click Add Comments and enter the text in the box provided.
   Click OK. This will close the contact and make you available to handle another contact.

Stopping and Starting the Flow of Contacts
If you need to stop the flow of contact delivery temporarily:
Click the Ready/Not Ready icon on the Toolbar to make yourself Not Ready. The green icon light will turn red.
To resume, click the icon again. The icon will change from red to green.
Responding to Specific Media Contact Requests

Inbound Telephone Contacts
By default, the Interaction Server gives priority to Telephone requests over all other incoming media requests. The iContact interface includes all basic telephone functions such as dial, answer, hold, transfer and conference. The telephone set at your workstation can provide backup in the event of a service disruption to your computer. The iContact is designed for use with a headset that is plugged into the telephone set.

![Image of iContact interface]

Inbox Fields
When you receive an inbound call, it appears in the Inbox. The fields are populated with the media name, received time, contact’s name and ID, when they can be matched to information in your database.

<table>
<thead>
<tr>
<th>Telephony fields</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The reference number assigned to the interaction</td>
</tr>
<tr>
<td>Media Name</td>
<td>The name of the telephone queue</td>
</tr>
<tr>
<td>Received Time</td>
<td>Time and date at which the request was received by the system.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The name of the contact person as it appears in the database.</td>
</tr>
<tr>
<td>Customer ID</td>
<td>Contact's account number.</td>
</tr>
</tbody>
</table>

Responding to an Inbound Telephone Request
The screen is populated with the caller’s telephone number in the dial box on the toolbar. If you are in the non-auto answer mode, it is necessary to click on the Answer icon on the toolbar to accept an inbound call. After accepting, you can put the caller on hold, conduct a conference call, or transfer the call to another user, or simply hang-up to conclude the conversation and mark the call as completed. Transfer and conference capabilities may not be available on all telephony platforms.

Fast Transfer
You can transfer contact requests to an individual or a queue. If the individual is engaged in handling another contact, the transferring contact will go automatically to the queue to await treatment.
1. To transfer a call, enter a phone number in the phone number or extension field.
2. Click Fast Transfer.

Supervised Transfer
You can transfer contact requests to an individual. When the individual answers you can enquire if they wish to accept the call and then either transfer the call of return to the caller.
1. Press Hold and enter a phone number in the phone number or extension field.
2. Click Dial and, when answered, either click Hold again to return to caller or hang-up to transfer the call.
WWW Requests

Inbox fields
When a WWW request arrives, it will appear in the Inbox. It will provide the following information:

<table>
<thead>
<tr>
<th>WWW fields</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The reference number assigned to the interaction</td>
</tr>
<tr>
<td>Media Name</td>
<td>The name of the WWW Queue</td>
</tr>
<tr>
<td>Received</td>
<td>Time and date at which the request was received by the system.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The name of the contact person as it appears in the database.</td>
</tr>
<tr>
<td>Customer ID</td>
<td>Contact’s account number.</td>
</tr>
<tr>
<td>Call Back Number</td>
<td>If the contact person has provided a phone number, it will appear here.</td>
</tr>
</tbody>
</table>

Responding to a WWW Request
1. After accepting a WWW request, the entire message will appear in the Content Window. Click the Web browser link and iContact will bring up the HTML page. You can view the page from which the contact person initiated the Web request.
2. To close the Web browser, click the X in the upper right hand corner of the page.
3. If the sender has provided a phone number you can initiate a callback. The number will appear in the Phone Number field in on the Toolbar. If no number has been provided, you may type one in.
4. Click the Dial icon to dial the number.
5. When the call is completed, click the Hang-up button again.
E-mail Requests

When you receive an e-mail contact request directly from a company Web site or an external source, it comes complete with the actual e-mail text.

### Inbox fields

When an e-mail request arrives, it appears in the Inbox. The request is assigned an ID number. The inbox will provide the following information:

<table>
<thead>
<tr>
<th>E-mail fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Number assigned to the specific interaction.</td>
</tr>
<tr>
<td>Media Name</td>
<td>The name of the email ACD group.</td>
</tr>
<tr>
<td>Received Time</td>
<td>Time and date at which the request was received by the system.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The name of the person who has sent the email message.</td>
</tr>
<tr>
<td>Customer ID</td>
<td>Account or identifying reference number.</td>
</tr>
<tr>
<td>Subject</td>
<td>The subject of the e-mail message.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Media Name</th>
<th>Received Time</th>
<th>Contact Name</th>
<th>Customer ID</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>813</td>
<td>EmailSupport</td>
<td>09/02/2000 13:42 AM</td>
<td>CI218</td>
<td>N/A</td>
<td>Test Message 1</td>
</tr>
<tr>
<td>814</td>
<td>EmailSupport</td>
<td>09/02/2000 13:42 AM</td>
<td>CI218</td>
<td>N/A</td>
<td>Test Message 1</td>
</tr>
<tr>
<td>815</td>
<td>EmailSupport</td>
<td>09/02/2000 13:42 AM</td>
<td>CI218</td>
<td>N/A</td>
<td>Test Message 1</td>
</tr>
</tbody>
</table>
After accepting an e-mail contact request, you can reply by e-mail or by phone.

**To reply by e-mail:**

1. Click inside the reply form in the message field. The reply message, by default, contains the original e-mail message together with all the attachment files. iContact automatically populates the e-mail address of the original sender.
   **Note:** You can choose to add more recipients to this reply message by clicking on the To: and Cc: buttons, and pick more names from the Outlook address book.

2. Type in the reply message into the reply form. You can attach one or more attachment files with the e-mail reply. To do so, click the Attachment icon and select the file(s) in a File Manager program. When the reply message is complete, click the Send button to send the message.
   **Note:** If you need to send another email, enter the recipient’s e-mail addresses, and click Send again.

**To reply by phone:**

1. If the sender has provided a phone number you can initiate a callback. Enter the number in the Phone Number field in on the Toolbar. The e-mail text will recede to the background.
2. Click the Dial icon to dial the number.
3. When the call is completed, click the Hang-up button again.
4. Close the e-mail before moving on to the next request or follow the instructions for e-mail reply to send a confirmation by e-mail.
Chat Requests

You can receive and send chat messages to contact requests that come into the organization. Customers visiting the Web site initiate requests for live 1-to-1 chat.

<table>
<thead>
<tr>
<th>ID</th>
<th>Media Name</th>
<th>Received</th>
<th>Contact Name</th>
<th>Customer ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>104755</td>
<td>TechChat</td>
<td>1/30/03 06:30 AM</td>
<td>Hellen</td>
<td>0</td>
</tr>
</tbody>
</table>

Inbox Fields

When a chat request arrives, it appears in the Inbox. The inbox will provide the following information:

<table>
<thead>
<tr>
<th>Chat fields</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The reference number assigned to that specific interaction</td>
</tr>
<tr>
<td>Media Name</td>
<td>Name of the media queue</td>
</tr>
<tr>
<td>Received</td>
<td>Displays the time and date at which the request was received by the system.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Name of the contact</td>
</tr>
<tr>
<td>Customer ID</td>
<td>Contact’s Account Number or reference Number</td>
</tr>
</tbody>
</table>
Responding to a Chat Request

When you accept the chat request, an invitation is sent to the chat sender to join you in a private chat room. When the chat sender has accepted the invitation, the chat can proceed. The message that the chat sender sends will appear in the Content Window.

1. To send/reply to a chat message, enter the text in the textbox and click **Send**.
2. Either you or the chat sender can choose to end the chat session. You must close the contact to complete Chat session.
3. Enter a URL and click on **Push URL**. This will cause a new web based window to open on the Client and to navigate to the supplied web page.
Proactive Outbound Campaign Contacts

Outbound calling lists are delivered to your desktop in the same way that other contact media is sent. They consist of a series of caller records including the telephone number, name and other relevant information to assist you with your purpose in contacting the individuals on the list.

<table>
<thead>
<tr>
<th>ID</th>
<th>Queue Name</th>
<th>Contact Name</th>
<th>Customer ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1376</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Jones</td>
<td>1235</td>
</tr>
<tr>
<td>1377</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Morris</td>
<td>1237</td>
</tr>
<tr>
<td>1378</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Jones</td>
<td>1239</td>
</tr>
<tr>
<td>1379</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Smith</td>
<td>1239</td>
</tr>
<tr>
<td>1380</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Johnson</td>
<td>1240</td>
</tr>
<tr>
<td>1381</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Jordan</td>
<td>1241</td>
</tr>
<tr>
<td>1382</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Douglas</td>
<td>1242</td>
</tr>
<tr>
<td>1383</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Martian</td>
<td>1236</td>
</tr>
<tr>
<td>1384</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Becket</td>
<td>1243</td>
</tr>
<tr>
<td>1385</td>
<td>Test_Spec:Fxxl_MarksC</td>
<td>Morrison</td>
<td>1245</td>
</tr>
</tbody>
</table>

Inbox Fields

When you select a proactive contact, the caller’s records will appear in the inbox window that will provide the following information:

<table>
<thead>
<tr>
<th>Proactive fields</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The reference number assigned to that specific interaction</td>
</tr>
<tr>
<td>Media Name</td>
<td>Campaign Name.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The name of the contact.</td>
</tr>
<tr>
<td>Customer ID</td>
<td>Account number or Reference Number.</td>
</tr>
</tbody>
</table>

Initiating a Proactive Campaign Contact

1. If you are in Auto Dial mode, the iContact program automatically dials the phone number in the Phone Number field when the contact request has been accepted.
2. If you are not set up for Auto Dial, iContact delivers the record with the phone number inserted in the telephone number field.
3. To dial the number, click the Dial button.
4. To disconnect, click on the Hang-up button.
5. If your call attempt has not been successful because you have encountered a busy signal, answering machine, fax machine, modem or a no answer, the system automatically reschedules that call for you when entering those Interaction Results when closing the contact.
6. If you want to reschedule a callback to yourself specifically or to the Group for reasons not designated in the previous step, use the Follow-up feature.
Initiating New Contacts

The iContact interface supports the generation of telephone calls directly from the desktop. You would use iContact to make external and internal outbound calls in the same way that you would use your telephone set. You will be still able to make phone calls when handling static contact media like e-mail or Web callback.

When you dial a number, iContact provides notification of the status of your call letting you know when you are dialing, connected and disconnected.

Making an Outbound Call (Single Line)

1. Enter the number of the party you wish to call in the dial box. It is not necessary to enter punctuation or dialing prefixes such as “9”.
2. Click the **Dial** icon on the Toolbar.
3. Click the **Hang-up** icon to terminate the call.
4. When you have completed the call, delete the number you have entered in the dial box.
Using Outlook with iContact

Introduction

iContact offers the convenience of using Outlook features in conjunction with the MMM iContact interface, without having to exit from the iContact application. You can access and send e-mails with attachments using your personal address book, book appointments and meetings, reference journal entries and create tasks for yourself, all from this single interface.

iContact Outlook Interface

Outlook menus and commands are enabled on the iContact interface and allow you to work with Outlook features. While you may already have a user profile for Outlook, this abbreviated version is designed to complement the activities you perform with the iContact interface. These include reviewing reasons for follow-up in the Journal or retrieving internal e-mails from your colleagues. You may also use it to store contact management records. You will see enabled menus and commands on the following navigation toolbars:

- Menu bar
- Icon bar
- Internal Collaboration

Accessing iContact’s Outlook

Click the Outlook button at the bottom of the vertical icon bar. The iContact icons convert to Outlook selections.

Menu bar

File Menu

The File Menu allows you to initiate activities in Outlook that are independent of iContact interactions. To access enabled Outlook e-mail, Contacts, Tasks, and Calendar and Journal, do the following:

1. Click File Menu.
2. Select New, and choose the Outlook feature you want to work with.

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Provides access to Outlook e-mail, contact address book, task list, and appointments.</td>
</tr>
</tbody>
</table>

Note: You create new entries to Outlook features from Menu bar. To view list of existing entries or incoming messages, select Outlook from the Icon bar.

Vertical Icon bar

The Outlook icon appears at the bottom of the Icon Bar. You can access existing Outlook entries and review your inbox folders containing e-mail, Contacts, Tasks, and Appointments and Journal.

Returning to iContact

When you want to return to contact handling activities, click the iContact button on the vertical icon bar.
Internal Collaboration Features

Sending Internal e-mail

If you and your group members are equipped with Microsoft Outlook as the e-mail program, you can send internal e-mail correspondence without having to log out of the iContact application. The e-mail will be sent to the team member’s iContact Outlook inbox.

1. Click the Team Member icon to view the status of workgroup members.
2. Select a group member from the team member window and right click on the name.
3. Click e-mail from the pop-up menu. The recipient’s internal e-mail address will appear in the “To” field.
4. Compose the e-mail message.
5. Click Send.
## Glossary

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BDC</strong></td>
<td>Backup Domain Controller is a server in a network domain that keeps and uses a copy by a computer without interrupting its current or primary task. For Windows NT Server domains, BDC refers to a computer that receives a copy of the domain's security policy and domain database and authenticates logons. Also see <strong>Domain</strong> and <strong>PDC</strong>.</td>
</tr>
<tr>
<td><strong>CTI</strong></td>
<td>Computer Telephony Integration, a technology that acts as an electronic bridge connecting telephones or switches with computers. CTI controls or coordinates business processes and related applications through the exchange of commands and messages between computers and telephone systems.</td>
</tr>
<tr>
<td><strong>Domain</strong></td>
<td>The part of the computer network in which the data processing resources are under common control. See PDC and BDC.</td>
</tr>
<tr>
<td><strong>DHCP</strong></td>
<td>Dynamic Host Configuration Protocol, a standards-based protocol for dynamically allocating and managing IP addresses. DHCP runs between individual computers and a DHCP server to allocate and assign IP addresses to the computers and also limits the time computers can use the address. When time expires on the use of the IP address, the computers contact the DHCP server again to obtain an address.</td>
</tr>
<tr>
<td><strong>GUI</strong></td>
<td>Graphical User Interface.</td>
</tr>
<tr>
<td><strong>HTML</strong></td>
<td>HyperText Markup Language, the authoring language used to create hypertext documents for the World Wide Web.</td>
</tr>
<tr>
<td><strong>HTTP</strong></td>
<td>HyperText Transfer Protocol, the application protocol for moving hypertext files across the Internet. The protocol requires an HTTP client program on one end of a connection and an HTTP server program on the other.</td>
</tr>
<tr>
<td><strong>iChat</strong></td>
<td>iChat is a service that forwards chat requests to the chat queues. iContact Converts the PC to an all-in-one communications and data tool by allowing enterprise knowledge workers to prioritize and manage all interactions from one interface. An agent can see queued Telephone calls, E-mails, Web calls, chats, and can communicate with group members from one centralized view.</td>
</tr>
<tr>
<td><strong>iEmail</strong></td>
<td>iEmail is a service that is responsible for forwarding incoming E-mail messages to the E-mail queue or to the agent. iEmail also forwards web callback requests to the web callback queue.</td>
</tr>
<tr>
<td><strong>IMAP</strong></td>
<td>Internet Mail Access Protocol, an essential Internet protocol for E-mail communication. IMAP4, which is both a client and server protocol, can enable voice and fax message access and storage through a PC interface. IMAP4 also complements SMTP for retrieval/access of messages.</td>
</tr>
<tr>
<td><strong>Interaction Rules Wizard (client side)</strong></td>
<td>With the simplicity of an Outlook Wizard look and feel, the Interaction Rules Wizard defines the rules for incoming contact treatment for telephone, chat and Web Callbacks contact.</td>
</tr>
<tr>
<td><strong>Interaction Rules Wizard (server side)</strong></td>
<td>This module includes necessary folders and files for web callback and chat requests on the web server.</td>
</tr>
<tr>
<td><strong>IP</strong></td>
<td>Internet Protocol. The network layer of TCP/IP, containing the network address.</td>
</tr>
</tbody>
</table>
iPhone

iPhone is a service that applies telephony rules.

iServer

iServer consists of two parts. One is WT service, and the other is a combination of different server components, that run on the Microsoft transaction server.

LAN

Local Area Network.

LDAP

Lightweight Directory Access Protocol, a protocol used to access a directory listing. LDAP support is being implemented in Web-enabled and E-mail programs, which can query an LDAP-compliant directory. LDAP has become the Internet standard for directory infrastructure and is expected to provide a common method for searching E-mail addresses on the Internet.

MAC address

The address of a device identified at the media access control (MAC) layer of the network architecture.

PDC

Primary Domain Controller. For a Windows NT Server domain, the computer that authenticates domain logons and maintains the security policy and the master database for a domain. See BDC and domain.

Proactive List

The Proactive List Manager module facilitates the importing and assignment of outbound calling lists to Proactive Campaigns. It provides the administrator with the ability to manage outbound Proactive Campaign Lists. It furnishes the tools to create draft calling lists, attach them to campaigns and run the campaigns.

Reporting

The browser-based Reporting module provides complete enterprise management reporting through textual and graphical reports. These reports provide enterprise managers with a record of every step in the customer interaction process, and allow them to view and analyze how effectively interactions are being handled and how resources are being deployed. The reports can also provide a better understanding of how their operation and performance affects your networks, resources and people.

Resource Manager

The Resource Manager administration module consists of components that enable you to add queues, define interaction results, and assign human resources to all from a single, unified console. Resource Manager has a user-friendly Microsoft Explorer look and feel interface.

ITAPI

Telephone Application Programming Interface. Allows Windows applications to program telephone line based devices.

TCP/IP

Transmission Control Protocol/Internet Protocol is a networking protocol that provides communication across interconnected networks, between computers with diverse hardware architecture and various operating systems.

SQL

Structured Query Language is a database language used for creating, maintaining and viewing database data.

URL

Universal Resource Locator is an address that can lead you to a file on any computer connected to the Internet.
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