# iceBAR for Web

User Manual

Server Version 13.x

Part Number: UM_ICB_13.x_E_20240626
iceBar for Web version 13.x

# Table of Contents

# Welcome to iceBar for Web

As email, web-based, text-based, social, and video communications become more common in today's business world; organizations are evolving the way they communicate with their clients.

**ice** is a powerful communications solution that allows for the integrated handling of contacts as they are directed to contact center users (calls, email messages, instant messages (IM), webchats, Short Message Service (SMS), social media postings and messages, video calls, etc.). **iceBar for Web** is the perfect tool to help you handle contacts received through ice.

The *iceBar for Web User Manual* will help you to understand and manage iceBar for Web. A chapter is dedicated to each of the following topics:

- **Getting Started**: major concepts, the logon procedure, the logoff procedure, and the major components of iceBar for Web.
- **iceBar for Web Options**: use and configure iceBar for Web, allowing you to log on and handle contacts, as well as view important information about contacts received and queued.
- **Handling Contacts**: use contact handling features, such as receiving or responding to an email, and answering or placing a call.

This guide also features appendices, which address Global Settings and Microsoft Teams.

**Note:**

- iceChat, iceCapture, and iceMail are premium features of ice. They are not addressed in this manual. For information, refer to the *iceChat User Manual, iceManager User Manual,* and the *iceMail User Manual*.
- Many features of iceBar for Web are customizable by the **ice administrator** iceBar for Web that are accessible in your contact center. This manual contains information on all features of iceBar for Web. Your configuration may differ from those demonstrated in the manual. . . .

In discussing how the application works, this manual assumes that you:

- Have access to the *iceAdministrator User Manual*, *iceMonitor User Manual,* and *iceReporting User Manual*, and understand how to use the ice software applications;
- Understand basic telephony terms and concepts, such as queue and contact;
- Have basic navigating skills for standard Windows®-based graphical user interfaces. This includes the ability to right-click and left-click, resize and minimize windows, navigate and scroll with a mouse pointer and select options from a right-click menu;
- Have basic keyboarding and data entry skills. This includes the ability to position the mouse pointer and delete text.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** draw attention to functions and features that can affect the handling of contacts.
- Words displayed in **bold** font are defined within the paragraph.
- *Italics* indicate buttons on the software interface.
- The term "right-click" is used to indicate that the secondary mouse button, which by default is the button on the right, should be clicked. Mouse configuration can be changed so that the left mouse button is the secondary button (for personal preference, for example, if the user is left-handed).

# Chapter 1: Getting Started

To effectively handle and view information about contacts, you must first learn how to log on to iceBar for Web and understand some important iceBar for Web concepts.

The following sections describe the components of iceBar for Web, important terms, and concepts, logon and logoff procedures.

Once familiar with the interface of iceBar for Web, you may refer directly to Chapter 5: Handling Contacts for detailed information on handling contacts. If required, you can review
Chapter 2: iceBar for Web Options for more information on the components of iceBar for Web.

Appendix A: Global Settings provides information on the global settings of iceBar for Web. Appendix B: Microsoft Teams provides information on how Microsoft Teams can be used in conjunction with iceBar for Web.

# Key Concepts

It is important to understand the concepts in the following sections before using iceBar for Web.

## Remote Users

In most cases, users will be connecting to ice as a remote user. A remote iceBar for Web user is a user whose telephone set is not physically connected to the ice server. For example, the ice server might be located in Toronto, while the remote user is located in Montreal. Remote users include Microsoft Teams users. A remote user has a network connection to ice through the iceBar for Web application. When the remote user logs on to iceBar for Web, a call is placed from the ice server to the telephone set at the user's workstation. When the user answers the call, the voice connection to ice is established.

## On Hook vs. Off Hook

Consider a traditional telephone set with a handset and base.

When the handset is lifted from the base, the user is considered to be **off hook** as the receiver is off the base.

When the handset is placed on the base, the user is **on hook** as the receiver is on the base (i.e. when the phone is hung up).

A user is able to speak to customers when they are **off hook**, as they are actively connected to the customer. When the phone is **on hook**, they are not able to speak to or hear the other party.

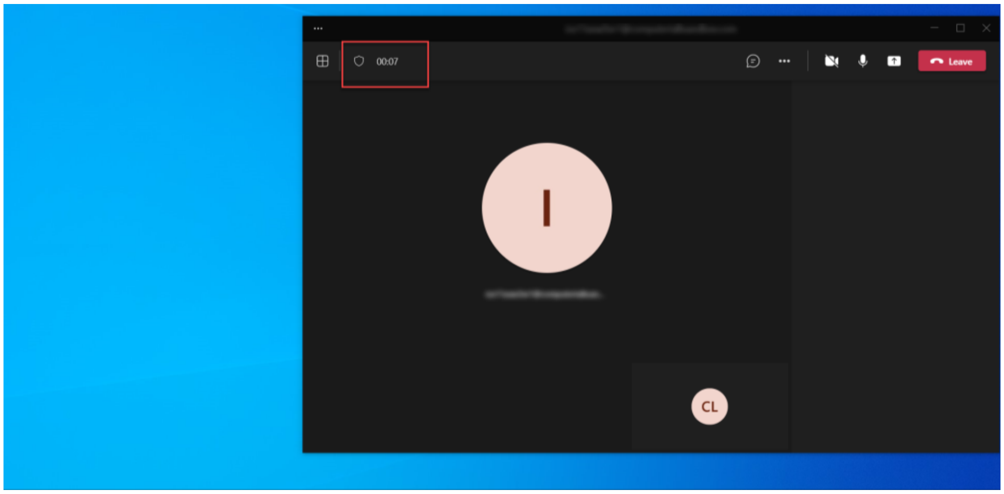
Similarly in ice, if a user is **on hook**, a connection between ice and the user must be established before a user can speak to a customer. This connection is established when the user answers a Microsoft Teams or call that ice initiates when the user is alerting for or placing a call, or the user places or answers a call using the icePhone.


Once this connection is established, the user is **off hook**.

If a call or email is presented to the user when the phone is **off hook**, a beep sounds in the user's handset or headset.

When a user hangs up the Teams call or the icePhone call, the user's connection to ice is severed. The user will be **on hook** until the Teams client or icePhone rings to alert the user to the next call. The user must answer the new Teams or icePhone call to re-establish the connection to ice.

When each call is completed, the user can leave the phone **off hook** by ending the call using the *release* button on the iceBar and keeping the Teams or icePhone call connected.




The customer call will disconnect, keeping the Teams call (the ice line) active. Every subsequent call will be preceded by a beep instead of a ring and can be answered using the answer button on the iceBar.

Note that ending the call from the Teams client will sever the ice line and set the user to be **on hook**.

For email and IM modalities, when a contact alerts a user who is **off hook**, only the iceBar toast notification will appear, because the connection between the user and ice has already been established. If the user is on hook, they must click *Answer* on the iceBar toast notification and *Accept* on the Teams toast notification to establish that connection.

**Note:** The *Drop ice User Line Between Calls* class of service in iceAdministrator will disconnect the ice line and force users to go **on hook** after every call. For more information, please refer to the iceAdministrator manual.

## Queued Contact vs. Direct Contact

A **queued contact** is one that originates from a queue on ice. Users receive a contact from the queue based on the amount of time that the user has been idle (i.e. since they received their last contact from a queue), and/or based on the relevance of their skills to the skill requirements of contacts waiting in the queue.

When a user is handling a contact, ice does not direct any queued contacts to the user. A user might enter the Wrapup state after completing a queued contact, depending on the user's class of service features.

A **direct contact** is one that did not originate from a queue. Consider these examples of direct contacts:

- A user-to-user call.
- Your contact center provides a number to family and friends, allowing them to reach a specific user. When the family member or friend calls the number, he or she is prompted to enter the four-digit User ID. The caller is transferred directly to the user.
- An email is routed to the user who previously handled the message.
- A user does not enter the Wrapup state after handling a direct contact.

A **transferred queued contact** is one that originates in a queue that is answered by User A and then is transferred to User B.

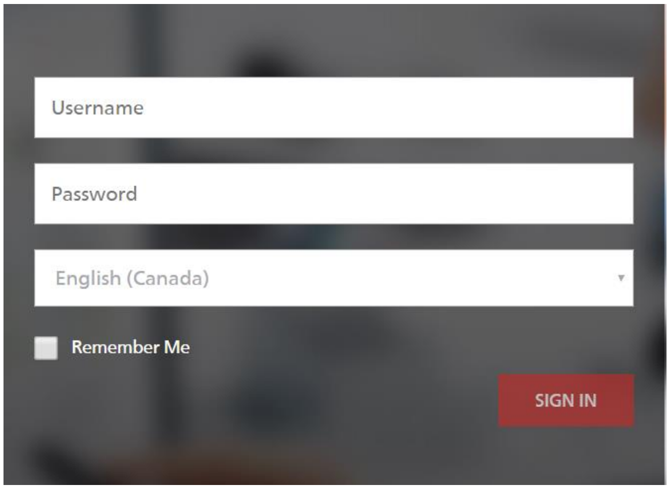
Consider the following, where User A answers a call and transfers the caller to User B:

- User B has the Wrapup class of service feature. Because the contact originated in a queue, User B enters the Wrap Up state when the contact is completed. For more information on the 'Wrap Up' feature, refer to the *iceAdministrator User Manual*.

# Logging on to iceBar for Web

To launch iceBar for Web, begin by opening your web browser. You will have been provided with a link from your administrator, which will enable you to access iceBar for Web. Enter the link into your browser's address bar to reach the login page.

**Note:** It is recommended to save this link as a bookmark within your browser, to enable access to iceBar for Web with one click in the future.




1. Enter your four-digit user ID in the Username field.
2. Enter your password in the Password field.
3. If your contact center has been configured for multiple languages, select a language from the drop-down menu.
4. If you would like the browser to remember your username for future logons, select the Remember Me box.
5. Click *Sign In* or hit Enter on your keyboard.

   iceBar for Web will now launch in your browser.

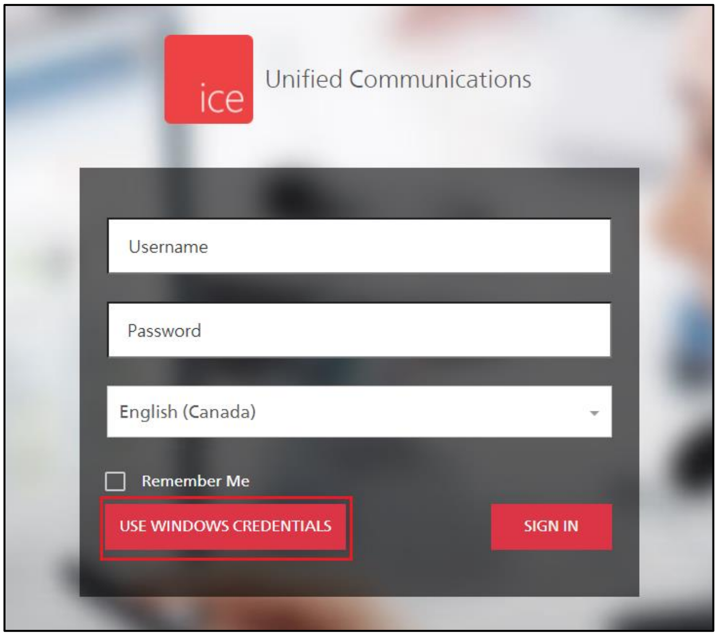
# Single Sign-On

If your organization has enabled Single Sign-On for iceManager, you will be able to sign on using your Windows credentials.

**Note:** To enable Single Sign-On, it will need to be configured using Active Directory in iceAdministrator. For further information on how to enable Single Sign-On, please review the iceAdministrator User Manual.

## Signing On with Single Sign-On

Once Single Sign-On is properly configured, launch the iceManager website, and click Use Windows Credentials button rather than entering the username and password.

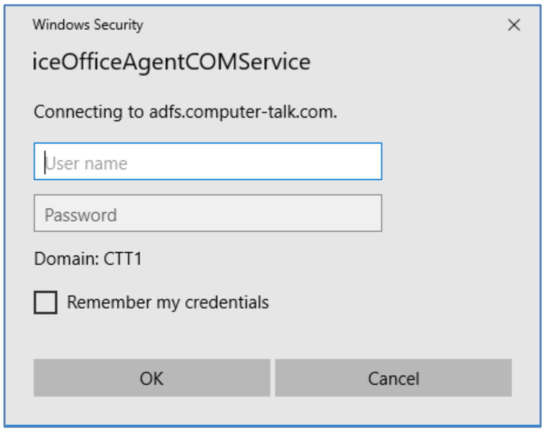


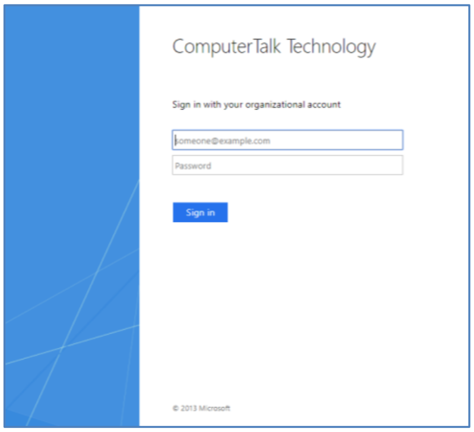

1. When you click *OK*, the Single Sign-On dialog box will appear.

   **Note:** If you wish to skip this step for future logins, check the box for *Remember Me*. This way, you will not have to enter your user ID each time you sign in.

2. To sign in with this method, you will use the same credentials that you use to log on to your computer or your company email. Enter your username and password in the boxes.

**Note:** This dialog box may look different, depending on the way your administrator has configured the system.

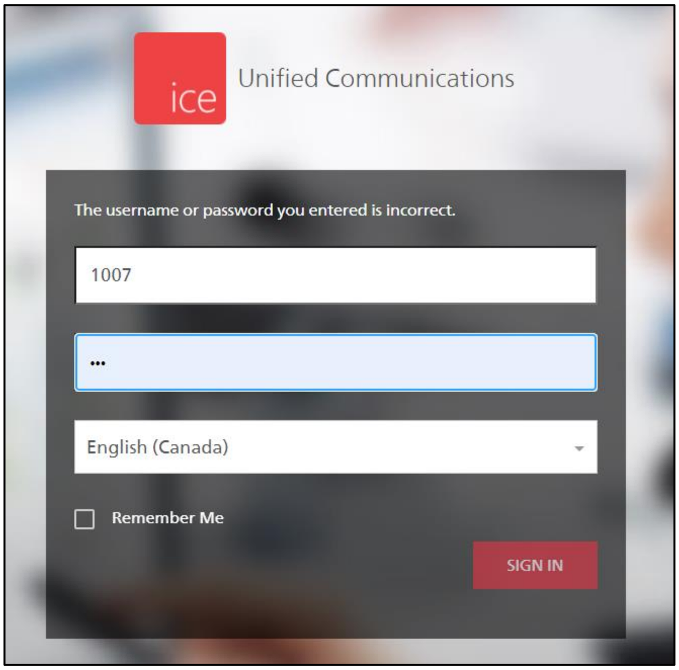


# Common Error and Warning Messages

## Authentication error

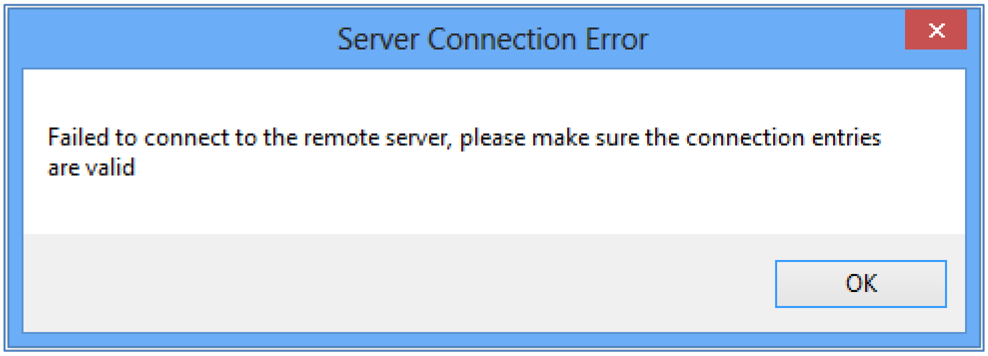
If a user types the wrong User ID or the wrong password, the following message appears.




If you cannot remember your password or User ID, an Administrator can reset it in iceAdministrator. For more information refer to the iceAdministrator User Manual.

## Server Connection Error

iceManager must have network connectivity to the ice server to function properly. If your contact center experiences network problems, you may see this error message.




“Failed to connect to the remote server, please make sure the connection entries are valid.”

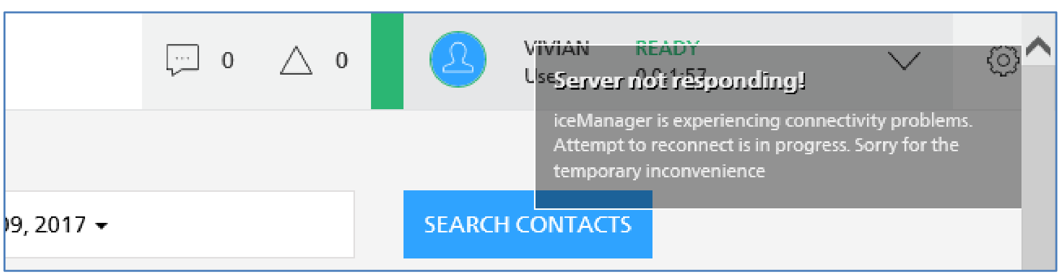
This error message indicates that the server is potentially experiencing a problem with connection. Please contact your ice administrator.

## Loss of connection

A few seconds after connection is lost, an error message appears in the top right corner of the screen:

“Server not responding! iceManager is experiencing connectivity problems. Attempt to reconnect is in progress. Sorry for the temporary inconvenience”.

The message fades away after a few minutes.  iceManager will keep attempting to reconnect until it is successful.



Verify that you are connected to the Internet. If you are connected, but still receive the Server not responding message, contact your Administrator.

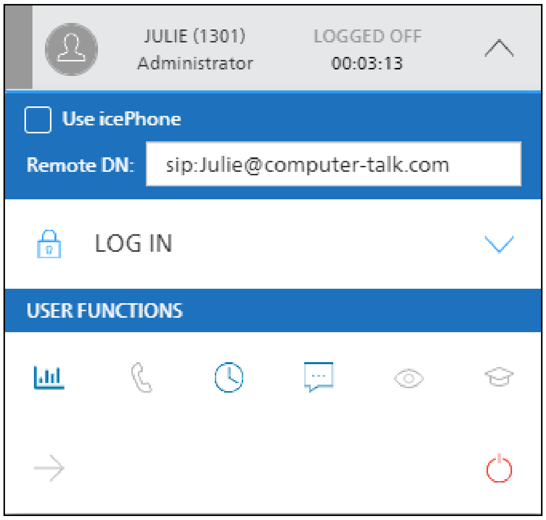
# Logon Procedures

**To logon:**

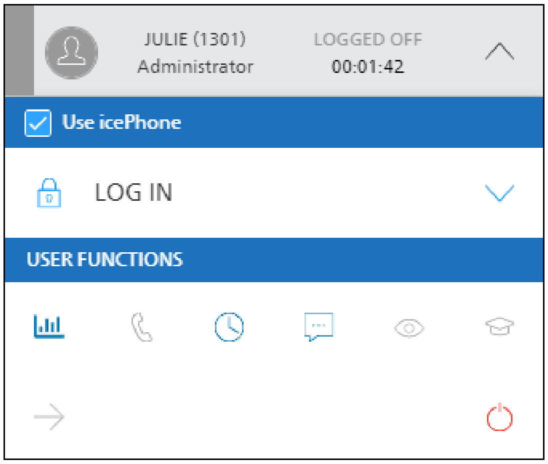
1. Click anywhere within the profile sidebar in the top right corner of the toolbar.


A drop-down menu will appear.

**Note:** The connection address can be modified in the Remote DN field before logging in.

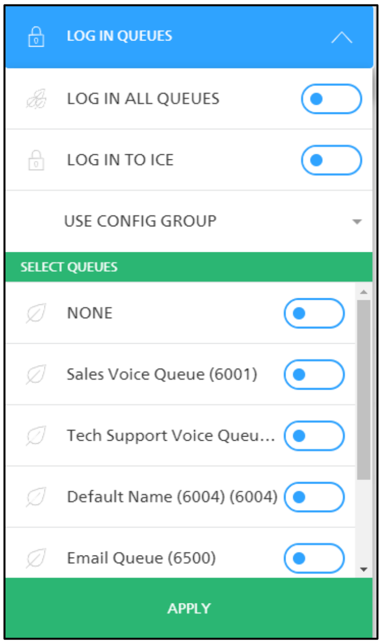



If you are using the icePhone, ensure that the checkbox is enabled.




2. Click on the *Log In Queues* button in the drop-down menu.

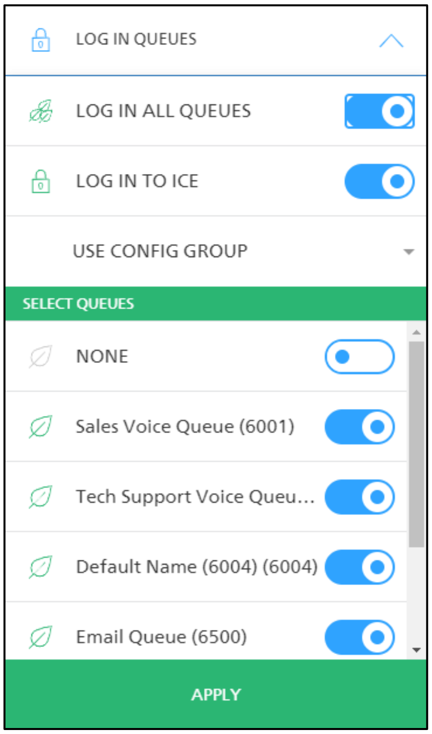
Another drop-down menu will appear.




The *Log In Queues* drop-down menu will display several buttons. These buttons correspond to the queues to which you have been assigned by the administrator. From here, you have several options:

Log In All Queues

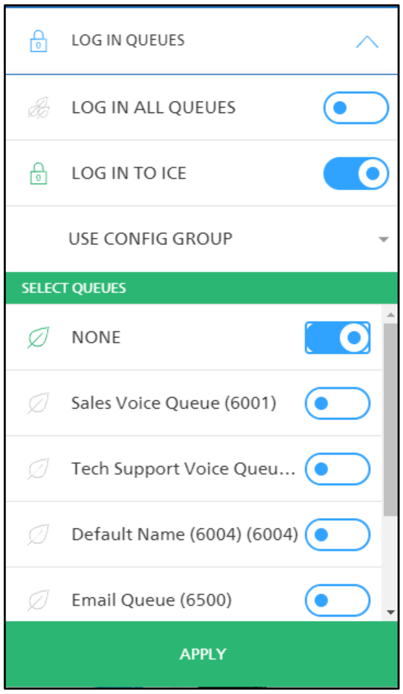
1. Click the toggle to the right of *Log In All Queues*. Each of the toggles will be switched to the on position.
2. Press *Apply* to be logged onto all queues.




Log in to ice

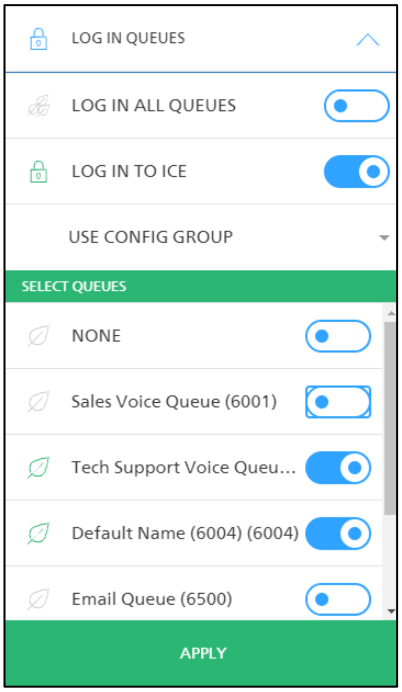
1. Click the toggle to the right of *Log in to ice*. The toggle will be switched to the on position. Press *Apply* to be logged onto ice without logging onto any queues.

   **Note:** The same effect can be achieved by toggling the *None* button, which will automatically toggle the *Log in to ice* button.




Logging onto specific queues

1. Click the toggle to the right of each queue that you wish to log on to. In this example, *Calls* and *Email* have been selected. Press *Apply* to be logged onto the selected queues.



2. After logging onto ice through any of the above methods, your state changes from *Logged Off* to *Ready*. This is reflected in the sidebar at the top right of your page. The *Ready* state indicates that you are prepared to receive contacts.

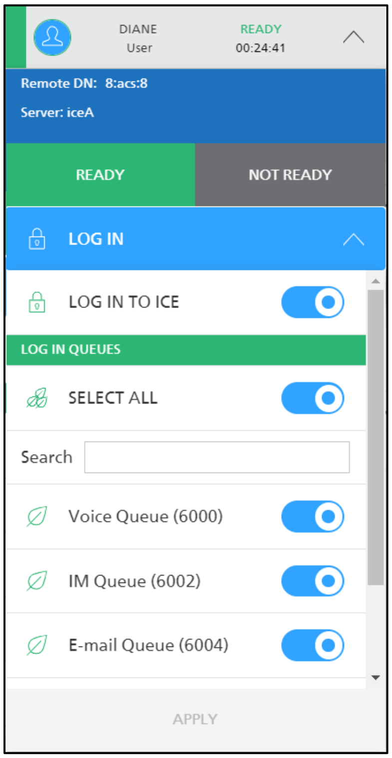
# Logoff and Exit Procedures

**Note:** You can log off from selected queues without exiting from iceBar for Web.

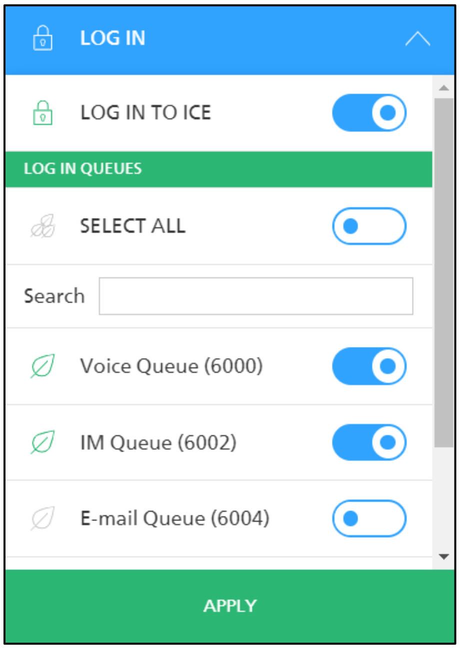
Log off Procedures

Click anywhere on your profile sidebar, then select the *Log In Queues* button.

The queue list will appear. The queues that you are logged onto will display a green toggle next to them.




To logoff of specific queues, simply toggle the switch next to the queue name. In this example, we were logged onto the *Sales, Tech Support, Default Name* and *Email* queues. We will log off all except the Sales queue.

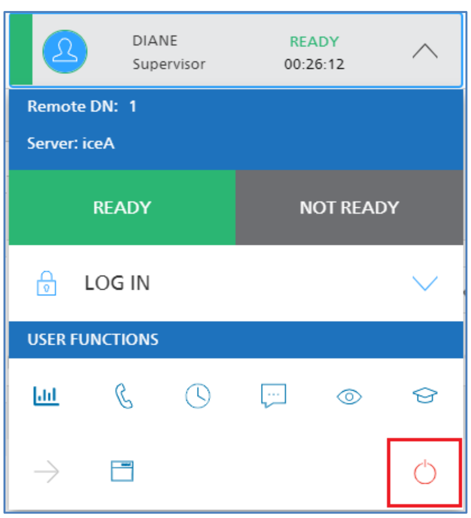



Toggle the green switch so that it becomes grey. Next, select *Apply*. You will be logged off all queues that display a grey toggle.

**Note:** If you wish to log off every queue, perform the steps above, but instead of selecting specific queues, toggle the switch for *Log in to ice and select Apply*. This action will log you off all queues.

Exit Procedures

Click anywhere on your profile sidebar. Then, in the bottom right corner of the profile sidebar, select the exit button, indicated by the symbol shown to the left.



You will be automatically logged off iceManager, and returned to the login page.

It is strongly recommended that you ensure that your state says Logged Off before exiting. If you exit without logging off, you will stay logged in to ice, which could lead to inaccurate statistics, calls being connected to unattended telephone sets, and problems for users who try to log on in subsequent shifts. The exception to not Logging Off before you exit is if you are connected to the thick iceBar client and wish to remain logged in to queues.


**Note:** Closing your browser will exit you from iceManager, but will not log you off from ice or from queues.

# Chapter 2: iceBar for Web Options

iceBar for Web has many options for customization for optimal usability.

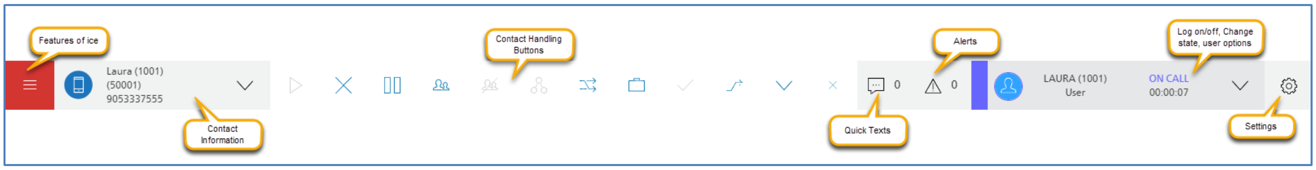
Topics covered in this chapter:

- Toolbar Options
- Notifications

# Toolbar Options

iceBar for Web allows you to:

- Access other components of ice
- Access the Contact Detail Panel
- View information about your current state and the contacts you are receiving
- Use the call handling buttons available in the toolbar
- Use quick text and alerts
- Log on and change state
- Change iceBar for Web settings




The toolbar is comprised of six sections:

- Components Menu: access other components of ice.
- Contact Details Panel: view information about your current contact.
- Call Handling Buttons: buttons for handling calls, including the quick text & alert buttons.
- Quick Text & Alerts: buttons for sending quick text messages and handling alerts.
- Profile Sidebar: panel for logging on/off queues, changing state, exiting iceBar for Web and some other user options.
- Settings: button for changing iceBar for Web settings.

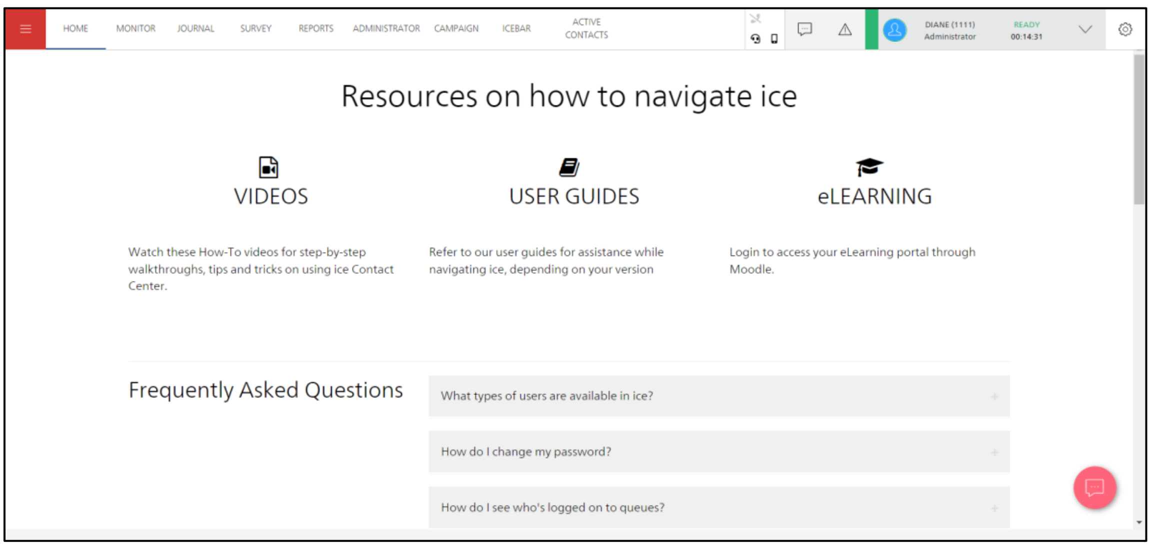
The following sections provide an overview of these panels and components and instructions on how to configure them to meet your needs.

## Understanding the ice Menu

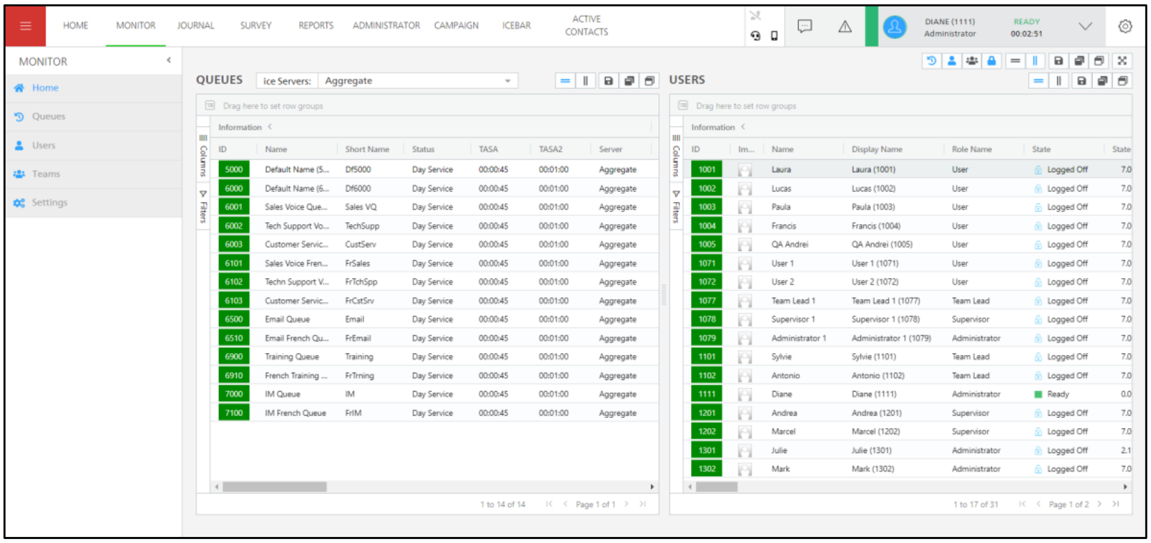
The ice Menu is used to access various features of ice. By clicking on the red square, you will be able to toggle between the various features of ice and contact handling in iceBar for Web. These components are covered in their corresponding user manuals.


To open the corresponding feature of ice, click on the name of the feature.

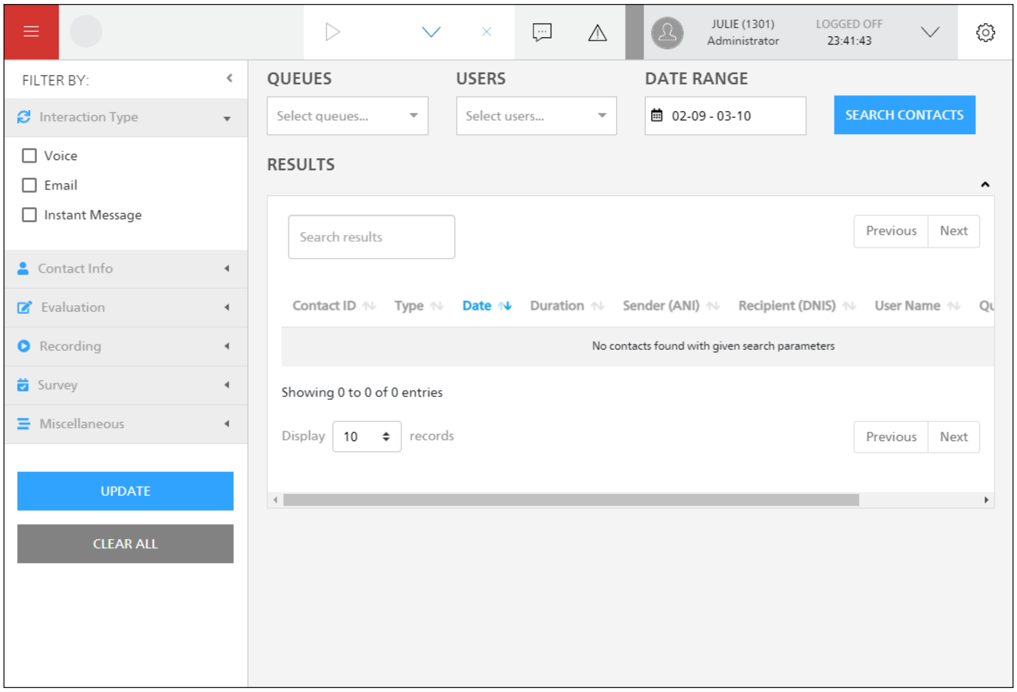
Selecting Home will open the iceManager help center containing how-to videos, user guides and manuals, eLearning, and more.



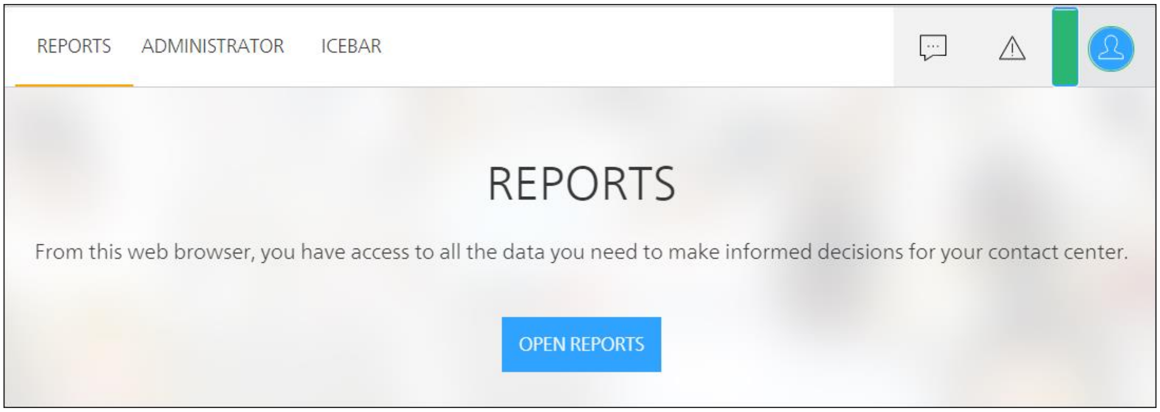

Selecting iceMonitor will open iceMonitor in your browser. For more information, refer to the *iceMonitor User Manual*.




Selecting iceJournal will open iceJournal in your browser. For more information, refer to the *iceManager User Manual*.

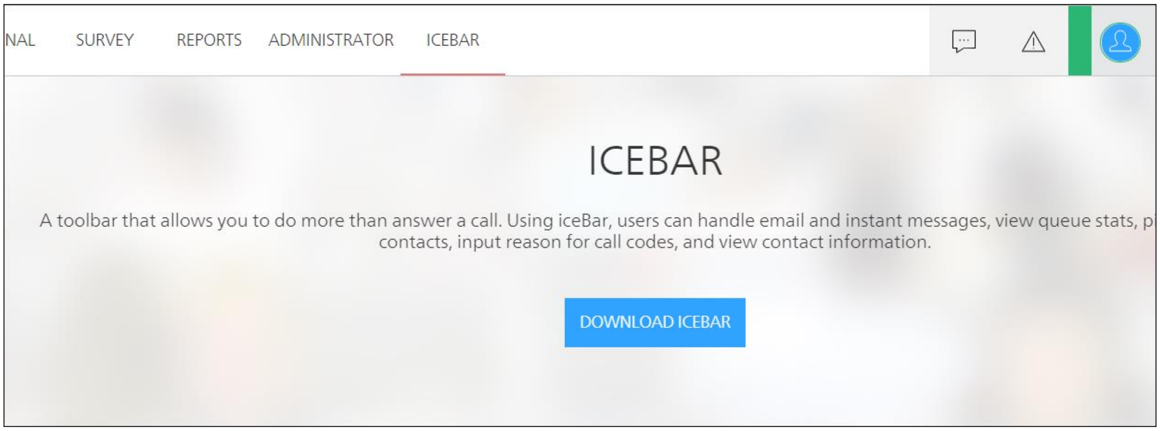


Selecting iceReporting will present you with the following screen:




Select Open Reports to access iceReporting in a new tab. For more information, refer to the *iceReporting User Manual*.

Selecting iceBar will present you with the following screen:




Select Download to download the iceBar thick client application.

**Note:** Some of these components of ice may be unavailable depending on the configuration of your contact center. Furthermore, some downloads, such as the iceBar thick client, may be unavailable depending on the configuration.

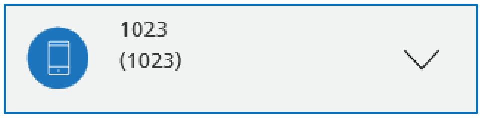
## Understanding the Contact Details Panel

The contact details panel is similar to call display on a telephone. This portion of the toolbar shows the information of the inbound contact...

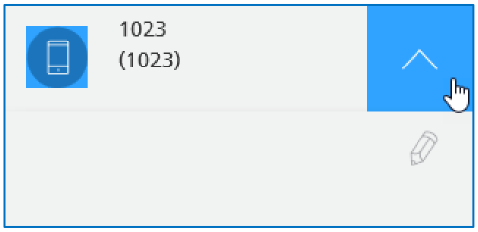
<u>This panel can show:</u>

- The sender's email address and name for a Queued email message
- Information about the queue from which the contact originated
- The number a caller dialed or the email address to which an email message has been sent
- Information specific to the caller, such as account number or ticket number
- **Note:** Workflow configuration or user input is required before information appears in this field.

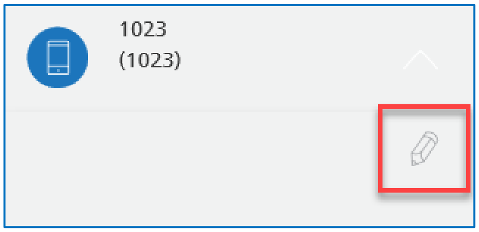
When a contact is presented to your workstation, or if you place an outbound call, the Contact Details Panel is replaced with information about the caller.



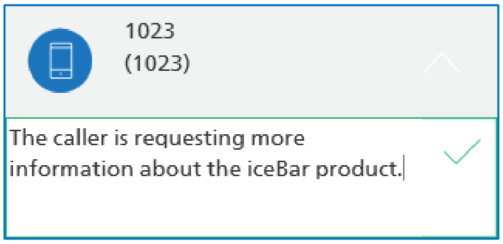

It is possible to add notes in the user data section of the contact details panel. To do so, first, click the drop-down in the panel.




The notes section will appear. Click the pencil icon to add notes.



You can now add notes about the call. To save the notes that you have written, click the checkmark icon in the corner of the text box. The notes will be saved and will be available when reviewing the call history.




The table below describes each field that is displayed on the Contact Details panel:

| **Information in the Contact Details panel** | |
|---|---|
| **Information** | **Description** |
| <Originator Name> | Displays the name of the originator of the contact. This might be the name that is passed on from the telephone company, a username, or the name of an email sender. In the example above, it's "1023" |
| <Originator Address> | Displays the phone number of a caller, the User ID of a caller or the email address of a sender.<br>In the example above, it is the User ID 1023 |
| <Target Name> | Displays the long name of the queue from which the contact originated (the long name is configured in iceAdministrator). If the incoming contact is direct, your username appears in this field. |
| <Target ID> | Displays the Queue ID of the queue from which the contact originated. If the incoming contact is direct, your User ID appears in this field. |

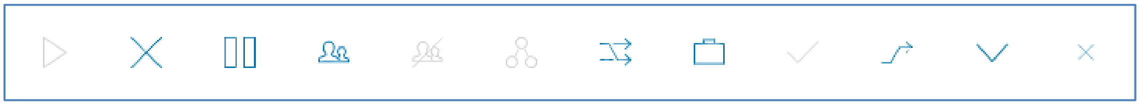
| Information in the Contact Details panel | |
|---|---|
| **Information** | **Description** |
| <Data> | The 'User Data' field is designed to show information that is specific to a contact, such as an account number. Information that automatically appears in the 'User Data' field is gathered as the contact moves through workflow and is passed to iceBar for Web when the contact is presented to you. This field also allows you to enter information that is associated with the caller or to modify the data already shown in the field (e.g., you might correct the account number in this field before you transfer it to another user). Instructions on how to add notes are on page 24. |

**Note:**

- The ice administrator can configure the "User Data" heading. For example, it may be changed to show "Account Number". For more information, refer to the *iceAdministrator User Manual*.
- Originator contact information can only be displayed when automatic number identification (ANI) is enabled on the incoming telephone lines, and when the information is passed to ice. For example, ice cannot display a caller's number if the caller has blocked his/her number.

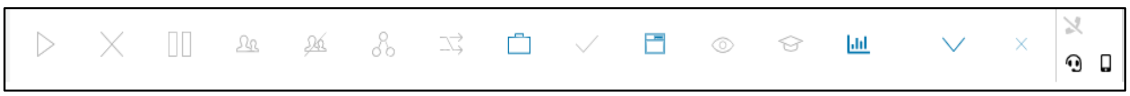
## Understanding the Contact Functions Panel

You can use the **Contact Functions Panel** to answer calls, place callers on hold, and perform several other call control functions.



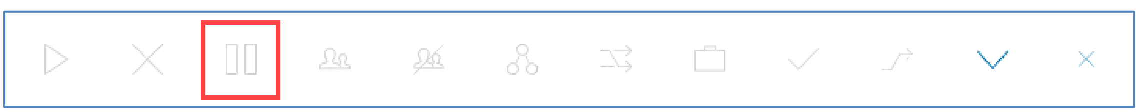
The toolbar contains ten call handling buttons: answer, release, hold, consult, end consult, conference, transfer, line of business (LOB) codes, email resolution codes and PAQ.

If you are using icePhone, you will see the icePhone buttons beside the Contact Functions panel.

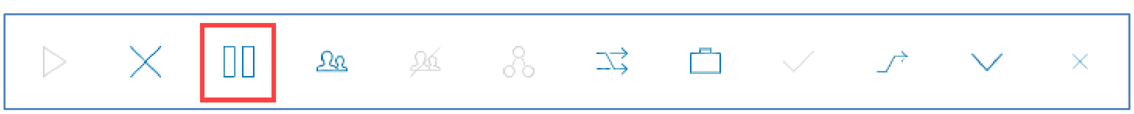


For more information on the icePhone buttons, refer to Chapter 4: icePhone.

The availability of buttons on the Contact Functions panel depends on your current state and the type of contact you are handling. For example, if you are not handling a contact, the *Hold* button is not available. The image below shows that the Hold button is greyed out when it is unavailable.



When you are handling a contact, the Hold button and other buttons will become available for use, as shown in the image below.



When a user is on a call, webchat or email, buttons such as Answer, Release, Hold, Consult, Transfer and Conference appear on the Contact tab. Some buttons may be disabled depending on the modality of the contact.

The table below briefly describes the functionality of each button that you can have on the Contact Functions panel. You will also find page references for more details on each button.

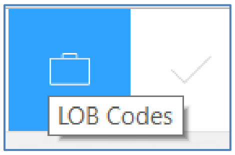
| Buttons panel summary | | | |
|---|---|---|---|
| **Button** | **Available when** | **Use Button to...** | **Page** |
| Answer | Alerting with a call. | Answer a call alerting at your workstation if off-hook. | 60 |
| Release | On a contact. | End the contact you are on. | 67 |
| Hold | On a call. | Place a caller on hold. The caller hears music while on hold. | 65 |
| Consult | On a call. | Consult a third party when you are on a call. | 72 |
| Undo Consult | On a consult or on a conference. | Release the third party and return to your original caller while on a consult or release the third party and stay on the line with your original caller while on a conference. This will only appear while on a consult. | 73 |

| Buttons panel summary | | | |
|---|---|---|---|
| **Button** | **Available when** | **Use Button to...** | **Page** |
| Conference | On a consult on a voice contact. | Initiate a conference call with your original caller while you are consulting or initiate a consultation while you are on a call. This button is only enabled while on a consult. | 79 |
| Transfer | On a call. | Transfer a caller to another user, queue or external number. | 68 |
| LOB | Logged In | Tag a call with a Line of Business code. | 90 |
| Email Resolution Code | In Email state. | Attach a resolution code to the email currently being handled. Also used to create new Resolution codes. | 108 |
| Add Participant | On a call. | Add participant(s) to allow for the multi-party conference. | 77 |
| Conference Roster | On a call. | See all participants active in the conference. | 79 |
| PAQ | In any state. | Manage contacts during multi-contact handling. | 124 |

| Buttons panel summary | | | |
|---|---|---|---|
| **Button** | **Available when** | **Use Button to...** | **Page** |
| Request New Contact | In a multi-contact user state | Request to receive a new contact during multi-contact handling. | 120 |
| Silent Monitor | Logged on | Start silent monitoring a user, or to notify you that a supervisor or administrator is actively silently monitoring you. | 115 |
| Coach | Logged on | Start coaching a user, or to notify you that a supervisor or administrator is actively coaching you. | 117 |
| Contact History | Application is open. | View user's contact history. | 110 |
| Elevate | User is on a call or IM. | Create a separate multi-party conference, for application sharing and video. | 81 |
| Mute | On a call. | Mute your microphone. | 66 |
| Place Call | Logged on | Place a call to another user, or to an external number. | 62 |

| Buttons panel summary | | | |
|---|---|---|---|
| **Button** | **Available when** | **Use Button to...** | **Page** |
|  Queue Stats | Application is open. | View Queue Statistics. | 79 |
|  Quick Text | Application is open. | Send a Quick Text message to another user. | 111Quick Text Messaging |

For more information on the button, you can also hover over the button and read the tooltip that appears.

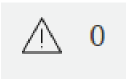



**Note:**

- The place call, monitor and coach buttons are disabled when logged off.

## Understanding Quick Text & Alerts


The *Quick Text* notification button is used to indicate when a Quick Text message is received from another ice user. For more information about using the Quick Text button, refer to page 110.




The *Alerts* notification button is used to indicate when an alerting threshold is reached. For more information on Alerts and alert configuration, refer to the *iceManager User Manual*.

## Understanding the Profile Sidebar

The Profile Sidebar is a visual representation of the user’s status. Once a user is logged on the Sidebar will be colored red or green based on the user’s current state.

| **Profile Sidebar summary** | | |
|---|---|---|
| **Sidebar Display** | **Description** | **Page** |
|   | **Ready:** the user is ready to receive contacts | 56 |
|   | **Not Ready:** the user is not ready to receive contacts | 57 |
|   | **On Contact:** the user is currently speaking with a contact | 58 |
|   | **Wrap Up:** the user has finished call but is not yet ready to receive next one | 58 |

The Profile Sidebar gives you access to the following additional options:

- Changing State: for more information, refer to page 56.


- Log On/Off Queues or ice: for more information, refer to page 5.

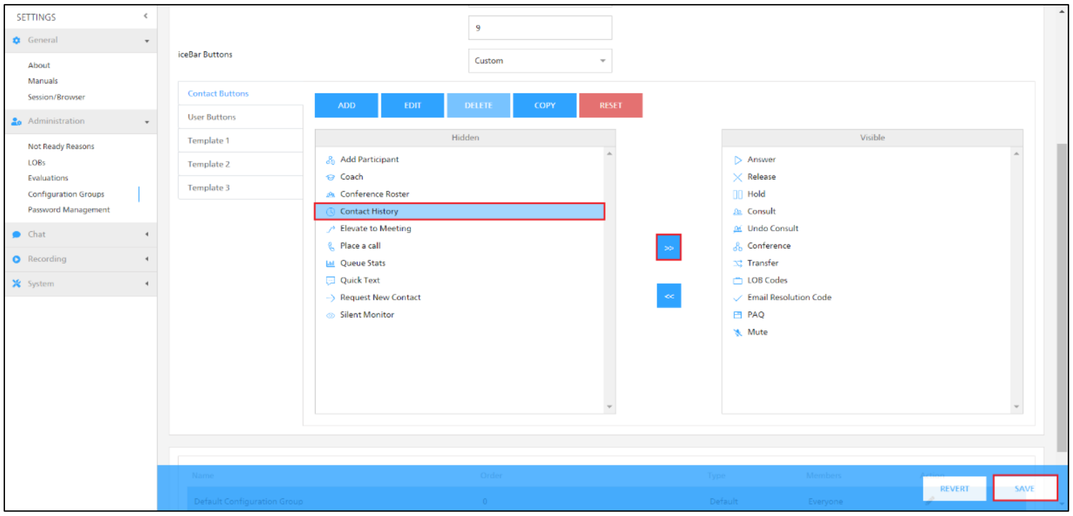

- Place Call: for more information, refer to page 62.

- Contact History: for more information, refer to page 110.
- Quick Text: for more information, refer to page 111.
- Silent Monitor: for more information, refer to page 115
- Coach: for more information, refer to page 117
- Exit: for more information, refer to page 16.

## Understanding the iceBar for Web Toolbar Settings

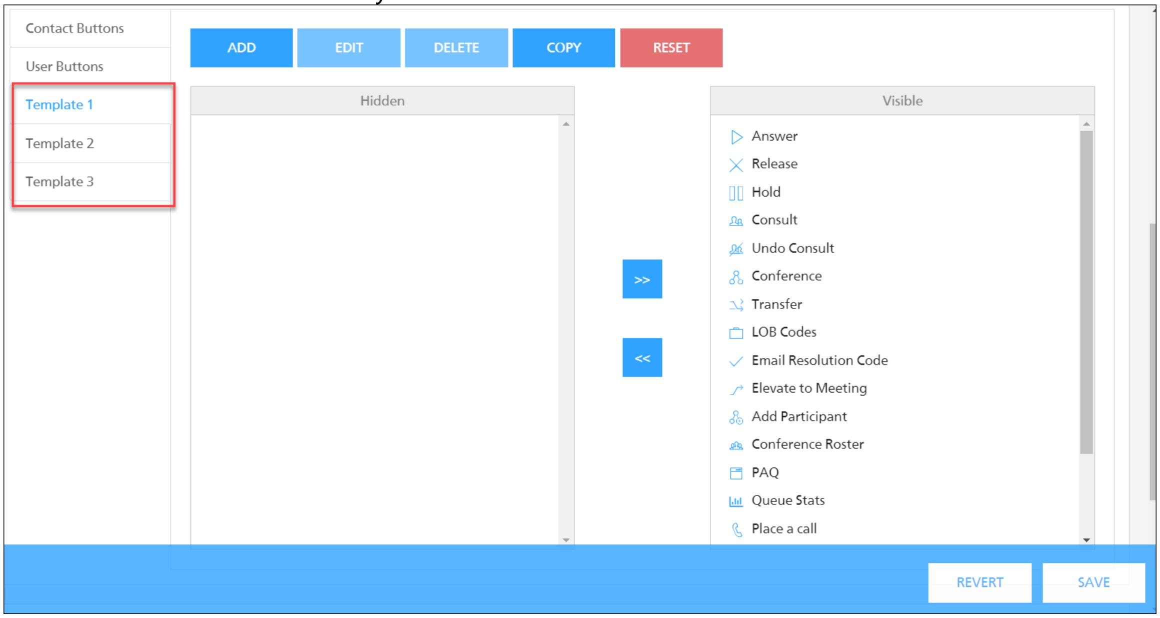
The iceBar for Web settings allows you to configure the buttons that appear on the iceBar for Web.

Buttons can be added and removed from the iceBar by highlighting the panel you wish to configure and moving it between the hidden and visible panels using the available arrows.




Templates 1, 2, and 3 can be used to create and save alternative layouts.

**Note**: Starting from 11.2.3, the Elevate to Meeting, Add Participant, and Conference Roster buttons will be Hidden by default.




For more information on configuring iceBar buttons, refer to the *iceManager User Manual*.

# Chapter 3: Personal Access Queue

The **Personal Access Queue (PAQ)** is a holding place for **direct contacts** (contacts which have been directed to your User ID). In some circumstances, queued contacts and outbound calls can also wait in your PAQ.

Consider the following examples of direct contacts that are placed into the PAQ:

- Another user in the contact center uses iceBar to call you while you are handling a contact or in the Not Ready state. The direct contact is placed into your PAQ.
- Workflow has been designed to allow callers to dial users by their User ID. When the caller enters your User ID, he or she is directed to your workstation. If you are handling a contact or you are in the Not Ready state, this direct call is placed into your PAQ.
- Workflow has been designed to send you email messages that you previously handled. When the customer sends a response to your reply, this email message is directed by ice to your User ID. If you are handling a contact or in the Not Ready state, this direct email is placed into your PAQ.
- You Park a direct call in your PAQ.

Queued contacts enter your PAQ under the following scenarios:

- Another user in the contact center answers a call from queue and then uses iceBar to transfer the caller to you. If you are already handling a contact or in the Not Ready state, this call is placed into your PAQ.
- You answer a queued call and then Park that call in your PAQ.

- You park an outbound call in your PAQ.
- You park an email in your PAQ (i.e., an email or social media post contact).
- You can park an IM in your PAQ (i.e., a web chat, SMS or social media message contact).

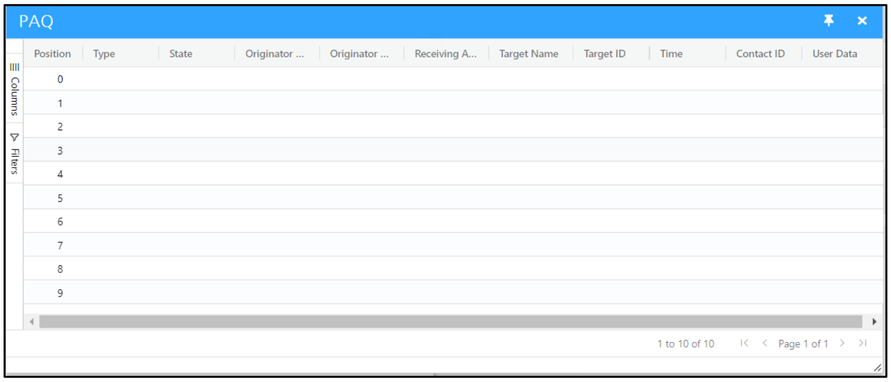
**Example:**

If you have the Waiting Beep class of service feature enabled for your user profile:

- You hear a beep in your handset or headset when a call is placed in your PAQ.
- If you have two calls waiting, you hear two beeps, three beeps for three calls waiting and so on.
- The beeps are replayed every ten seconds as long as there are contacts waiting in your PAQ.
- A lower-toned beep is also used to indicate that there are no contacts left in your PAQ.

Your PAQ window allows you to view information about contacts waiting in your PAQ, as well as information about the contact that you are handling.

Click the PAQ button to open the PAQ window.




The sections that follow:

- Explain the information displayed in your PAQ;
- Explain how to configure the window;
- Provide instructions on handling contacts within your PAQ.

**Caution:**

- If the 'Disable PAQ Queuing' Class of Service feature is enabled for a user, no calls can wait in the user's PAQ. If a call is presented to the user when they are on a call, in Not Ready state, or not logged on, the call fails (e.g., the caller hears a busy signal).
- Calls waiting in the PAQ are only visible to the individual the PAQ is associated with

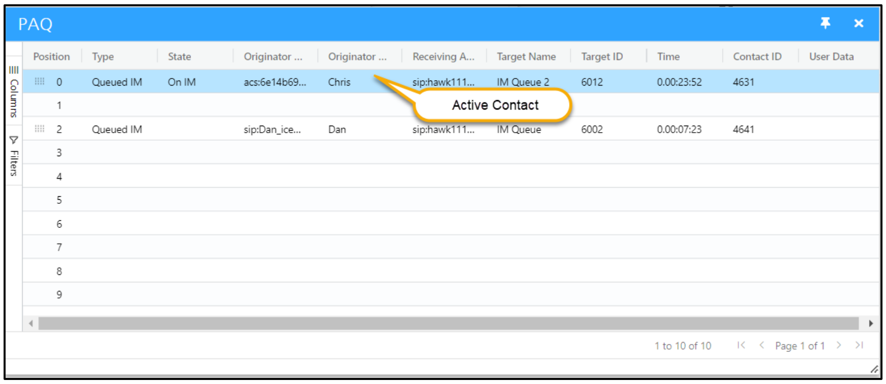
- Closing the PAQ does not remove the calls from the PAQ. The calls must be handled.

**Note:**

- Calls in your PAQ that you have answered are subject to the PAQ Overflow threshold that can be enabled for a user in iceAdministrator. Usually, this type of overflow sends callers to your voice mailbox after waiting in your PAQ for a specified number of seconds, but this configuration does not apply to every contact center. For more information on configuring users, refer to the iceAdministrator User Manual.
- The PAQ Overflow threshold does not affect any contacts that you have parked in your PAQ, meaning that parked contacts wait in your PAQ until they are handled or the caller hangs up.
- The park option is unavailable when you are silent monitoring or coaching a contact.
- When you have a contact in PAQ position 0, the Place Call, Start IM, Start SMS and the Start Email buttons are disabled.

## Understanding the PAQ

Each row in the PAQ window has a corresponding number or PAQ position. The active contact (the contact you are currently handling) is always displayed in row 0, while any position other than zero represents a direct call, direct email, or parked call waiting in your PAQ.




You can scroll to view information that is off the window. The 'PAQ Columns' table above describes each column in the PAQ window.

| PAQ Columns | |
|---|---|
| **Column** | **Description** |
| **Position** | Indicates the row or position of the contact in your PAQ. |
| **Type** | Indicates the type of contact. For more information on types of contacts that can be waiting in your PAQ, refer to the table that follows. |
| **State** | User's state with respect to contact. |
| **Orig. Address** | Displays the telephone number of the caller, or the email address of the sender, if available. Otherwise, it reads "No Caller ID".<br>For outbound calls, this field displays your User ID. |
| **Orig. Name** | Displays the name of the caller or the email name of the sender, if available. Otherwise, it reads "No Caller ID".<br>For outbound calls, this field displays your name. |
| **Recv. Address** | Displays the number that the caller has dialed or the email address to which the email message has been sent. For an outbound call, this field displays the number you dialed. |

| PAQ Columns | |
|---|---|
| **Column** | **Description** |
| **Target Name** | Displays the long name of the queue from which the contact originated. If the incoming contact was direct, this field displays your name. For outbound calls, this field displays “External.” |
| **Target ID** | Displays the four-digit Queue ID of the queue from which the contact originated. If the incoming contact was direct, this field displays your User ID. For outbound calls, this field is blank. |
| **Time** | Displays the number of seconds the contact has been in its current PAQ position. Display is in format: HH:MM:SS. |
| **Contact ID** | A unique number assigned by ice to the contact. |
| **User Data** | Displays data that has been entered by a user or associated with the contact in workflow. Right-click on this field and select Set User Data to enter or modify data, then press Enter on your keyboard. |

The experience of the caller that waits in your PAQ depends on the type of call and your user configuration in iceAdministrator. Typically, callers waiting in your PAQ hear ringing until you answer the call or until they hang up. Consider the following exceptions:

A PAQ Overflow Threshold is configurable in iceAdministrator and iceBar. When the threshold is met, any subsequent callers are redirected to the specified PAQ Overflow Dial Number (e.g., your voice mailbox). For more information, refer to the iceBar User Manual.

**Note:**

- A caller that you have parked in the PAQ hears music until you retrieve the call, or until the caller hangs up. Parked calls are not subject to the PAQ Overflow Threshold.
- Callers hear music in your PAQ if their call has been answered by another user and then transferred to you. These types of callers are subject to the PAQ Overflow Threshold.

The table below describes the types of contacts that you can view from the PAQ window.

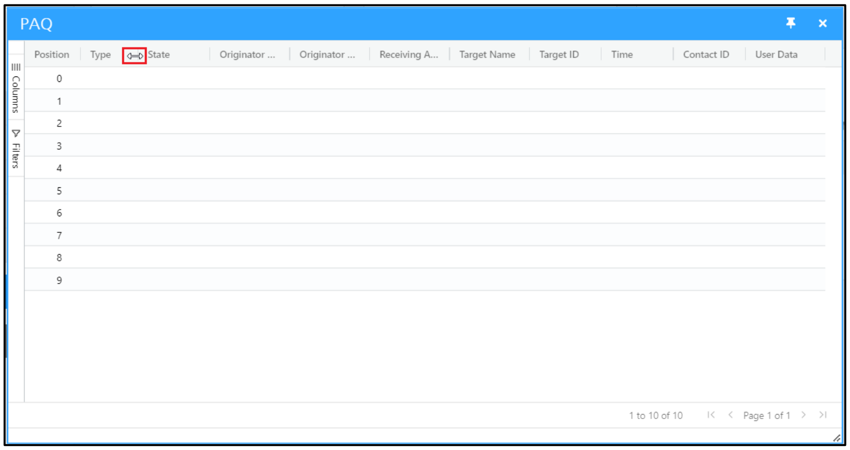
| Contact Types | |
|---|---|
| **Type** | **Description** |

| | |
|---|---|
| **Autodial** | Represents an outbound call that ice has made on your behalf (e.g., a voicemail in queue or outbound campaign). |
| **Inbound Direct Call** | Represents a call that has been routed directly to your user ID. |
| **Consult or Conference Call** | Represents a consultation that you have initiated. |
| **Direct email** | Represents an email that has been routed directly to your user ID. |
| **Inbound email** | Represents a queued email or social media post that you have received. |
| **IM** | Represents a queued instant message, web chat, text message, or social media message that you have received. |
| **Internal Call** | Represents a call between users on the ice server that you placed or received. |
| **External Call** | Represents a call to an outside number that you have placed or received. |
| **Queued Call** | Represents a queued call. |

# Configuring the PAQ Window

The PAQ window has several configurable settings that allow you to customize the window to your preferences. The following sections provide more details on these configurable settings.

Each column can also be resized to display information as required. In the example below, the 'Type' column is being resized.



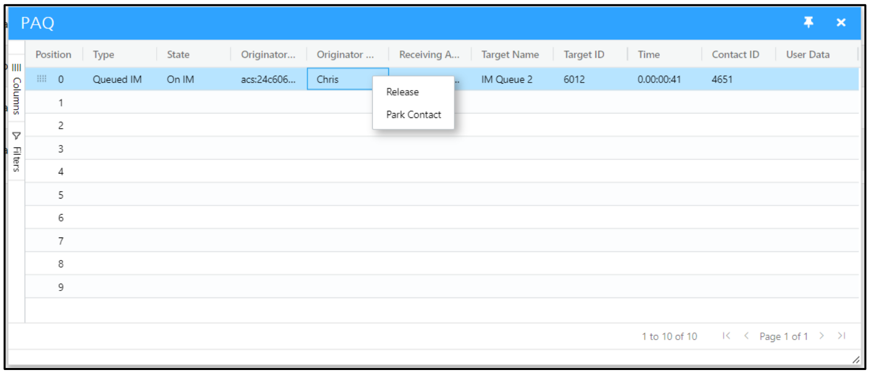
# Handling an Active Contact from the PAQ Window

The PAQ window has a dynamic right-click menu, which changes depending on the contact type and the PAQ position on which you click. When you right-click a call in the active position, the PAQ window allows you to use the following features of iceBar: *Release* and *Park*. Before you use the PAQ window to handle a call, you must be familiar with these features.

<u>To perform contact handling from the PAQ window:</u>

1. Right-click the active call in the PAQ window.

A menu appears.




2. Click the appropriate option from the menu and follow the necessary steps.

For example, if you would like to park the contact, left-click the 'Park Contact' option.

**Note:**

- This menu only applies to an active call (i.e., the call in Row 0).
- If your active contact is in the "in workflow" state, the Park Contact button will be disabled. (i.e., the call in Row 0).

# Chapter 4: icePhone

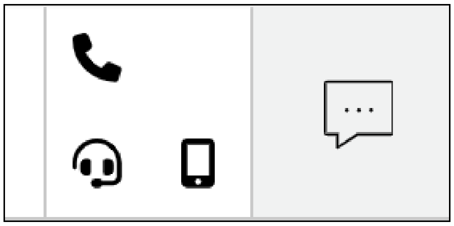
The icePhone allows users to handle phone and chat contacts natively within iceBar for Web. It provides a standard user interface within iceBar for agents to handle calls and chats without needing a separate softphone such as Microsoft Teams or Skype for Business. This chapter explains how users can access the different features of the icePhone to handle contacts.

The sections that follow will assume that you are familiar with logon procedures and with your contact center's configuration as described in Chapter 1: Getting Started.

**Note**: To use the icePhone, ensure the icePhone class of service is enabled for voice and/or chat contacts. For more information on how to configure the icePhone, please refer to the iceAdministrator User Manual.

# Understanding the icePhone

The icePhone provides an interface to handle chat and voice contacts within the same client. You can find the icePhone buttons to the right of the Contact Functions panel. The following section will describe the different icePhone buttons.



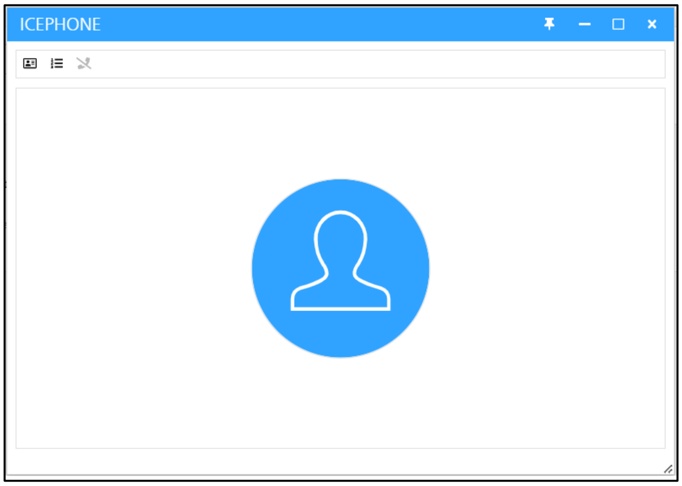
**Note**: The icePhone buttons will only be available if the 'Use icePhone' checkbox is enabled in your User Panel.

## Understanding the icePhone buttons

The following section will describe the icePhone buttons you can find on your iceBar.

### Show icePhone

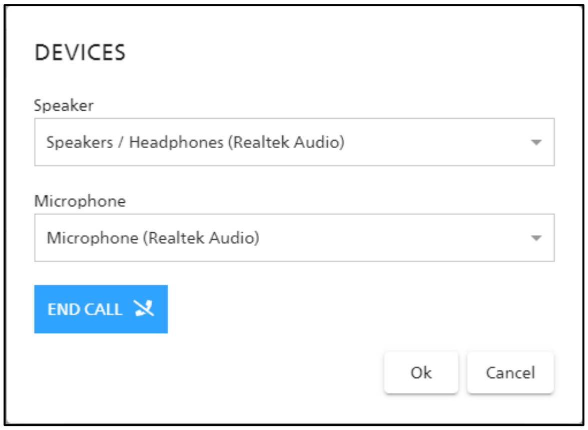
The *Show icePhone* button opens the icePhone client. If you are currently handling a contact, the icePhone window will populate with the contact's information allowing you to handle the contact using the buttons along the top of the window and the buttons on your toolbar.



**Note**: Closing the icePhone window does not release your contact. To release your contact, click the *End off-hook* button or the *Release* button on your iceBar.

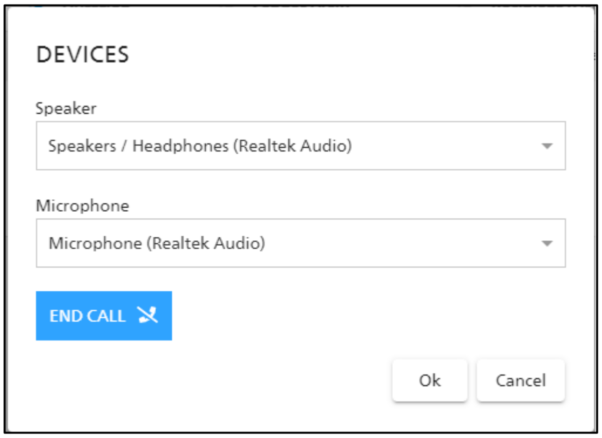
## Devices

The *Devices* button opens the devices window to set your speaker and microphone device preferences.




The *Make a Test Call* button allows you to place a test call to test your speaker and microphone input.

You will then be instructed to record a message after the beep to test your inputted audio configuration.

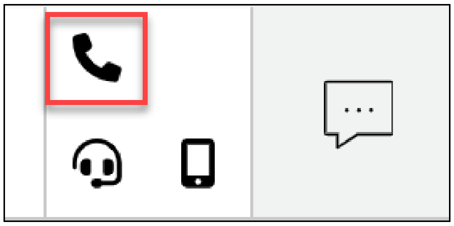



Click the *End Call* button to end the test call.
To close the Devices window, click Ok to save your changes or Cancel to exit.

## End Off Hook / Set as active call device

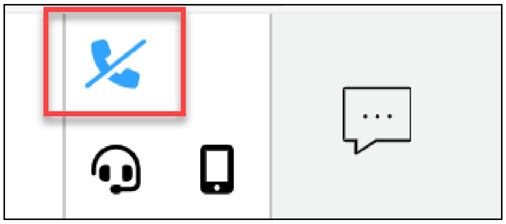
The function of this button will depend on whether you are on-hook or off-hook.

If you are already on-hook, clicking this button will set your current iceBar as your active call device and will place you off-hook in preparation for your next contact.



You may only be active on one device at a time. If you have set your icePhone on iceBar for web as your active call device, the button will be unavailable on iceBar for desktop.

If you are off-hook, the button will be blue. Clicking this button will release any contact you are handling and will place you on-hook.



For more information on On Hook and Off Hook, please refer to On Hook vs. Off Hook on page 2.

**Note:**

- You must have the 'Use icePhone' box enabled in order to be able to use the icePhone buttons.
- If you have the *Drop ice user line between calls* class of service enabled, the button will only be available as an *End Off-Hook* button. It will only be available when you are handling a contact and will set you on-hook and release the contact when clicked.

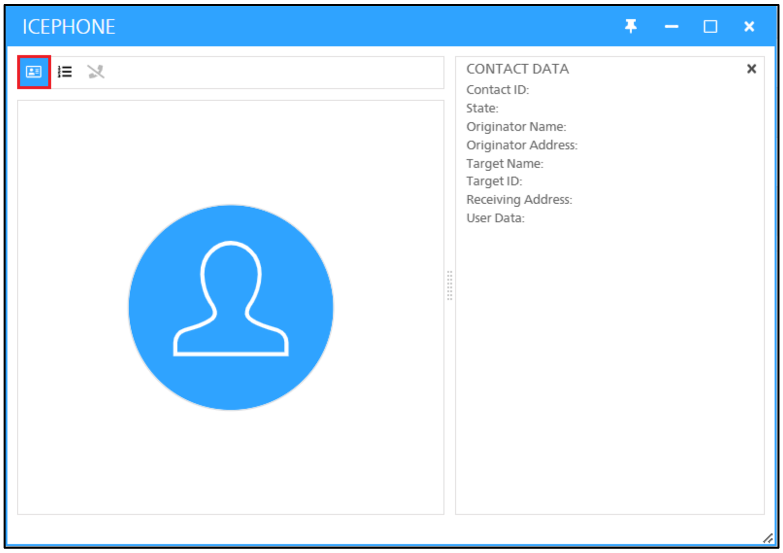
## icePhone for Voice

The icePhone client allows agents to receive and handle interactions through one interface. Agents can handle and place calls from either the iceBar for Desktop or iceBar for Web without the use of a separate softphone, such as Teams.

The following section will describe the icePhone buttons you can use while handling a voice contact in the icePhone client window.

### Contact Data

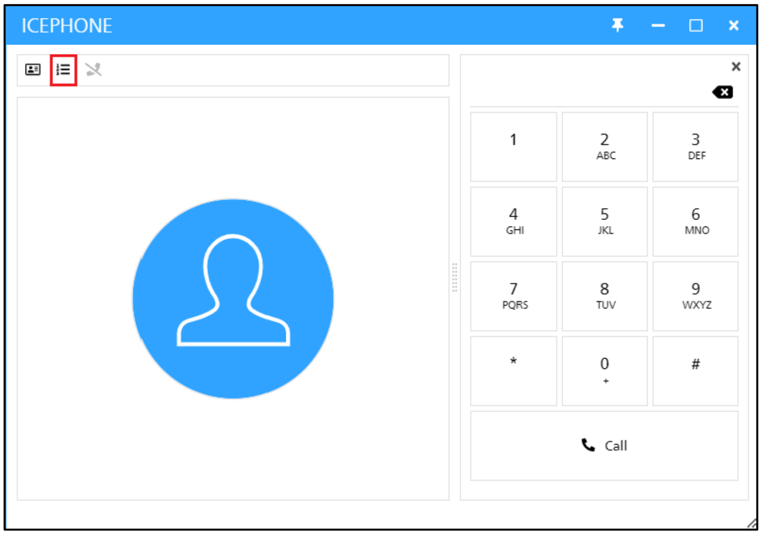
The *Contact Data* button displays information about your contact including the Contact ID, State, Originator Name and Address, Target Name and ID, Receiving Address and User Data.




To close this tab, either click on the *Contact Data* button again, or click on the 'x' in the top right corner of the screen.

### Dial Pad

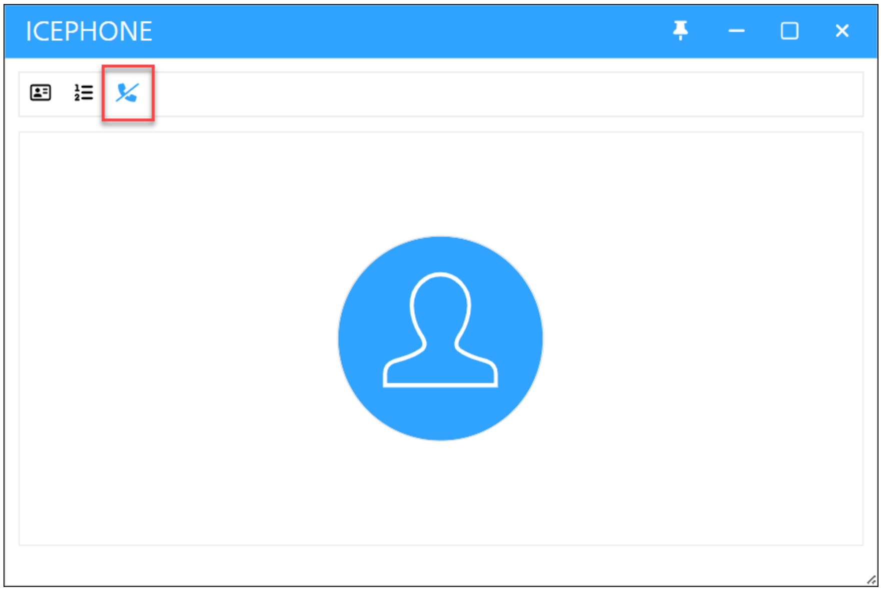
The *Dial Pad* button opens the icePhone dial pad. You can dial a number and click the Place call button on the bottom of the dial pad.




To close this tab, either click on the *Dialpad* button again, or click on the ‘x’ in the top right corner of the screen.

## End Off-hook / Set as active call device

This button is the same as the end off-hook/ set as active call device button on the iceBar toolbar. For more information, refer to page 46.

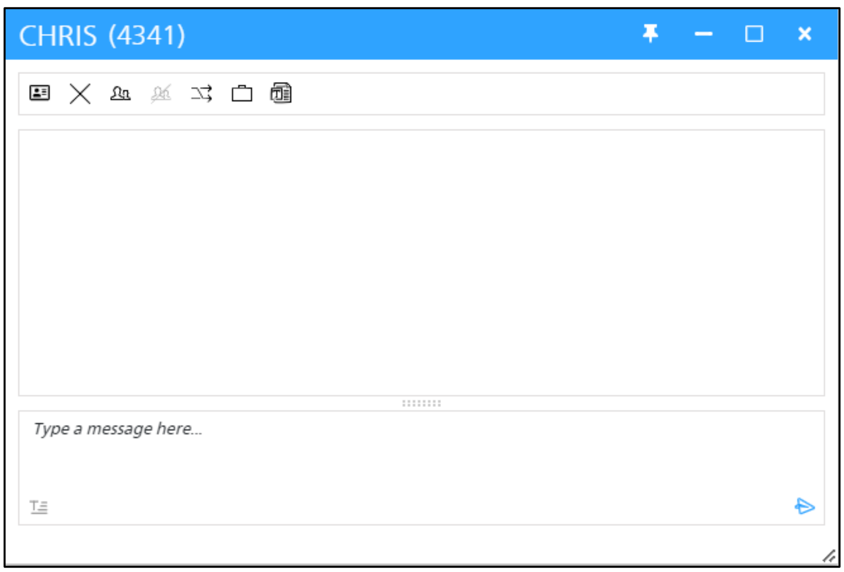



To close this tab, either click on the button again, or click on the ‘x’ in the top right corner of the screen.

**Note:** Closing the icePhone window does not end your call. You must click the *Release* button on your toolbar, or the *End Off-hook* button on your icePhone to end the call. If you close the icePhone and would like to open it again at any point during your call, you can do so from the icePhone button on your toolbar.

## icePhone for Chat contacts

The icePhone chat client can be used to handle chat contacts. The client is composed of a content panel, where the chat conversation with your contacts are displayed and a set of contact handling buttons along the top of the window.




The following section will describe the additional icePhone buttons available when handling a chat contact.

**Note:**

- Your profile must be configured for IM handling in order to be able to use the buttons for the icePhone for Chat.
- Buttons on the icePhone that are available for chat contacts include Consult, End Consult, Transfer, LOB, and Canned Responses. These buttons are still accessible on the iceBar toolbar and can be used instead.
- You will still be able to use the buttons mentioned in icePhone for Voice on page 47.

## Consult

There may be occasions when you wish to consult a third party while you are handling an IM. Perhaps you need assistance with a customer or would like to confirm something with a supervisor. To do this, you can use the Consult button.


For more information on the Consult/End Consult button, please refer to Consulting with icePhone on page 75.

## Transfer

There may be occasions when you wish to transfer an IM to a different queue or user. To do this, you can use the Transfer button.


For more information on the Transfer button, please refer to Transferring an IM with icePhone on page 69.

## LOB (Line of Business)

You may be asked to tag contacts with one or more Line of Business Codes. The codes are a way of categorizing the contact, based on the nature of the contact. To do this, you can use the LOB button.


For more information on LOB codes, please refer to Using Line of Business Codes with icePhone on page 106.

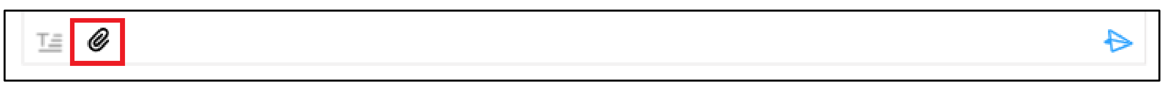
### Canned Responses

Canned responses are predetermined responses to common questions. Users can select a canned response from a pre-defined list while handling an IM contact. To do this, you can use the Canned Responses button.


For more information on the configuration of Canned Responses, please refer to the *iceManager User Manual*.

### Contact Attachments

The Contact Attachments button allows the user to select a file from their local machine to upload in the chat window.



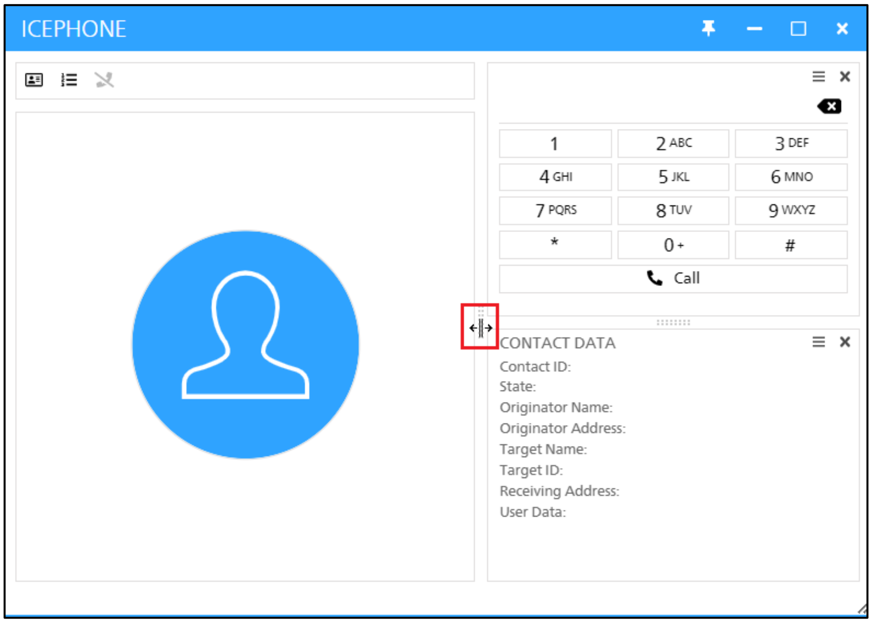
For more information, please refer to Using Contact Attachments on page 98.

## icePhone Configuration

Multiple tabs in the icePhone Client can be open at the same time. You can configure the icePhone client by resizing or reordering its tabs.

### Resize Tabs

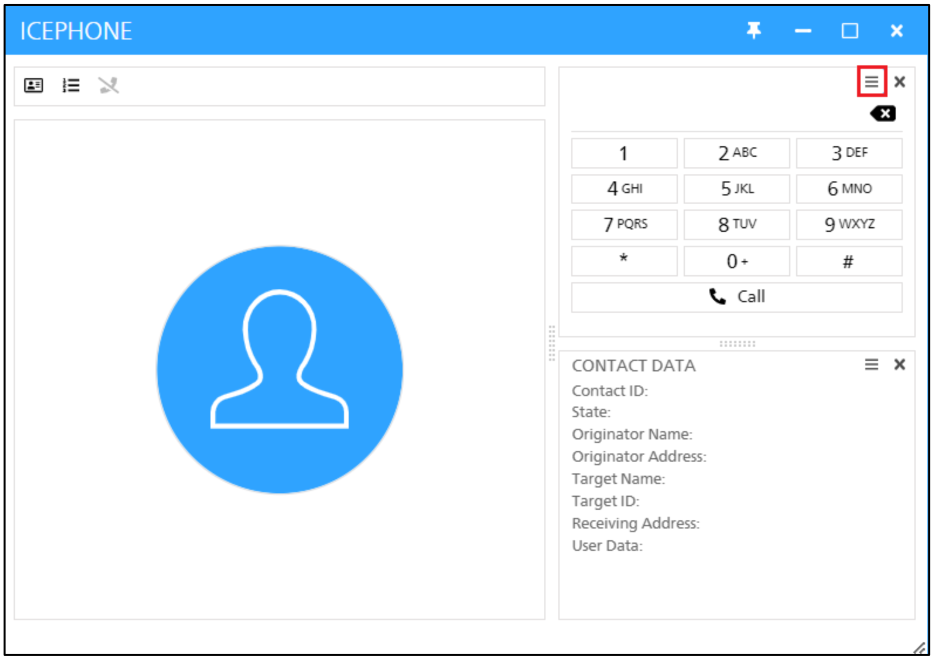
To resize a tab, you can click and drag the edges of the tab to your desired size.




The tabs will expand or decrease in size.

## Reorder Tabs

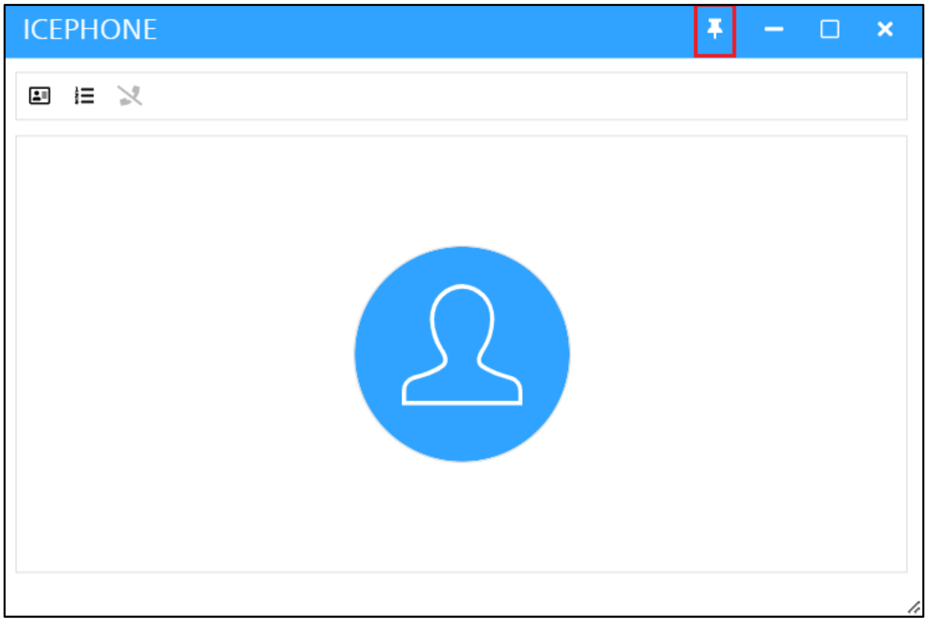
To reorder a tab, click on the hamburger icon in the top right corner of the tab and drag the tab to your preferred location.



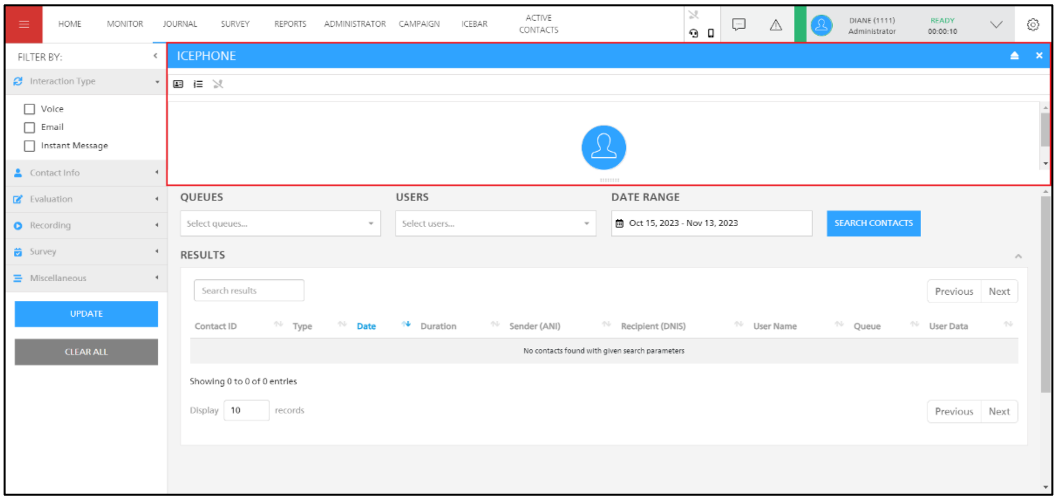
The tabs can be reordered up or down.

## Dock Tabs

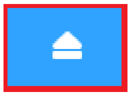
To dock the icePhone client window onto your iceManager page, click the *Dock* button the top right corner of the tab.



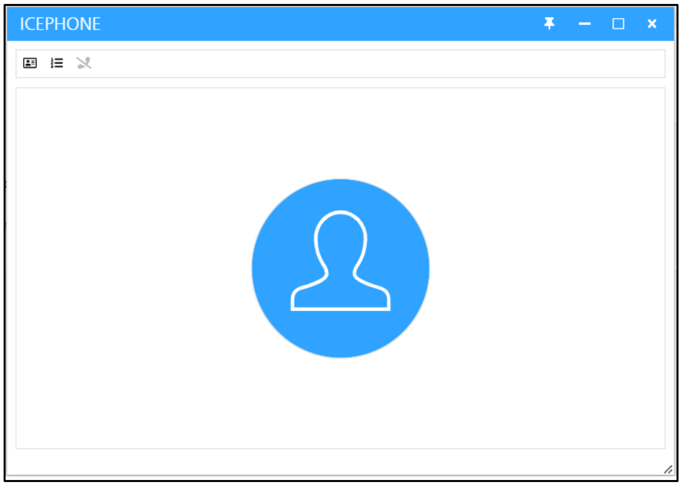

The icePhone client window will be docked on the top of the page and will remain open while you navigate to different pages in iceManager.



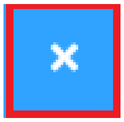
To undock the icePhone client, click the *Undock* button on the top right corner of the tab.



The icePhone client will reopen in a new window.




To close the icePhone client window, click the *x* button on the top right corner of the tab.



# Chapter 5: Handling Contacts

This chapter provides a general description of how users can access the different features of iceBar for Web to handle contacts. Not all features discussed in this manual may be included with your configuration of iceBar for Web.

The sections that follow will assume that you are familiar with logon procedures and with your contact center's configuration as described in Chapter 1: Getting Started.

# Ready, Not Ready, Wrap Up, On Contact

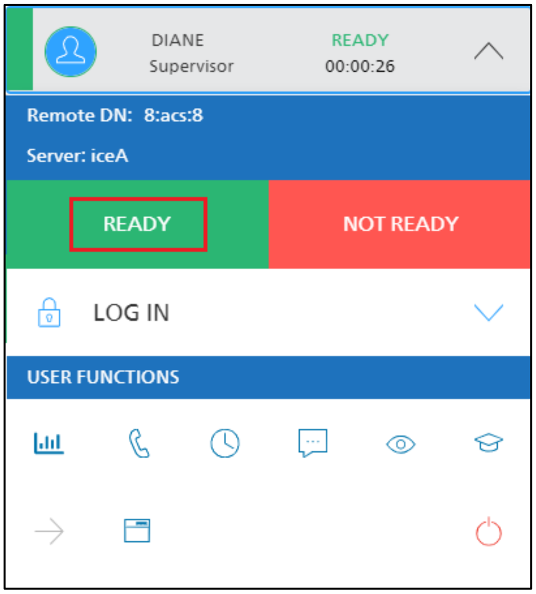
For iceBar for Web, you will be automatically placed in either the Ready state or the Not Ready state, depending on the configuration of the user profile. By clicking on your user profile, the drop-down menu will enable you to toggle between a Ready and Not Ready state.

- When you are in the Ready state, the *Sidebar* will be green. In this state, you must be prepared to handle a queued contact. You may make yourself Not Ready, even while on a call, by clicking your user profile and selecting Not Ready, followed by a Not Ready reason from the drop-down menu.
- When you are in a Not Ready state, the *Sidebar* will be red. In this state, you cannot receive any queued calls.

## Ready

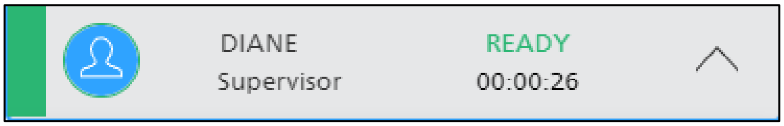
First, click the drop-down arrow on the right side of the profile sidebar. The profile options drop-down will appear.


Select the Ready button to toggle to the Ready state.

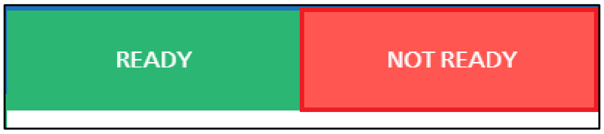


## Not Ready

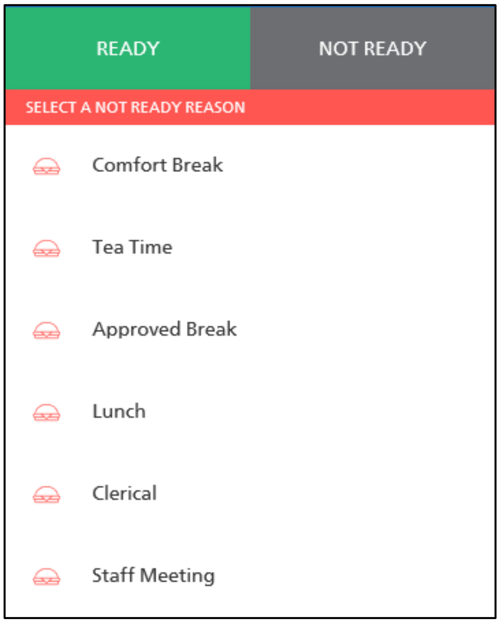
First, click the drop-down arrow on the right side of the profile sidebar. The profile options drop-down will appear.




Select the Not Ready button to expand the list of Not Ready Reasons.




Select a Not Ready reason to toggle your state.




**Note**: The Not Ready Reason options that have been configured for your contact center may look different from the ones shown above.


Once you have selected a Not Ready Reason, that reason will be displayed in your profile sidebar. In this case, "Comfort Break" has been selected.

**Note:** Users with Team Lead access level or higher can modify Not Ready Reasons in iceAdministrator. For more information, refer to the *iceAdministrator User Manual*.

## Wrap Up

Wrap Up state after each queued call. Wrap Up allows users to finish post-contact work and prepare themselves for the next contact. While in this state, users will not receive any calls from the queue, similar to when users are in the Not Ready state. However, a few factors make the Wrap Up state distinct from the Not Ready state:


- The sidebar is amber – when it appears, it indicates that the user is currently in the Wrap Up state.
- Wrap Up time is calculated separately from Not Ready time on reports.
- A timer can be set to ensure that users do not return to a Ready state until they click on their user profile in the iceBar for Web toolbar.
- Wrap Up time after a queued call is associated with the queue that the call has come from. Wrap Up time for calls that were transferred will be calculated from the original queue.
- Wrap Up is only an option when the ice administrator enables the feature.
- If your contact center uses Forced LOBs, you may enter them during Wrap Up.

Once in the Wrap Up state after ending a call, you may go to the Ready or Not Ready state. Simply select the user profile in the iceBar for Web toolbar, then select Ready or Not Ready from the drop-down menu.

**Note:** If a timed Wrap Up has been defined in iceAdministrator, you will enter the selected Not Ready state when the timed wrap expires. If the Wrap Up is infinite, you enter the selected Not Ready state immediately. For more information on configuring Wrap Up, refer to the *iceAdministrator User Manual*.

## On Contact

When you are on a call, IM or Email, the sidebar turns blue and the state changes to reflect the type of contact that you are handling.


If you are using icePhone, the icePhone buttons will be available when you are on a contact.

**Note:** The Sidebar will remain blue for the entire duration of the contact; however, the state and state time will reset based on the contact control buttons clicked.

<u>Call</u>

When you receive a call from ice, you will be automatically placed in an On Call State:

- The sidebar turns blue and the state changes to "On Call".
- Call time is recorded.

A tab, containing contact-type specific buttons, will appear to represent the interaction.

The tab would show the caller's name as well as the phone number or SIP address he/she is calling from. If the caller's name is not provided, the caller's phone number or SIP address will be displayed.

# Receiving a Call

In the instructions below, the subsequent assumptions are made: that you are in the Ready state, are wearing a headset, and have the ice line off-hook (with a voice connection to ice).

## Answering a Call

If you are off-hook (with a voice connection to ice), iceBar for Web plays a beep in your headset to indicate that you are being presented with a call. You will see the following overlay appear on your iceBar for Web:


In the top left corner, you will see the name of the caller and the address or phone number. In the center, you will see which Queue and Queue ID the contact originated from. Finally, you will see the Answer and Release buttons. To answer the call, select the Answer button. To ignore the call, select the Release button.

If you are using icePhone, you must answer the call using the Answer button on the toolbar or the Answer button on the iceBar toast notification.

**Note:**

- The *Answer* button does not become available until you are presented with a call.
- If your telephone is on hook when you are presented with a call, your phone rings to indicate that you are being presented with a call. You do not have to press the *Answer* button on the iceBar upon picking up the handset. Instead, you are automatically connected to the caller.
- If you are on hook while the call is alerting and using a softphone, you will see the Microsoft Teams or Skype for Business toast notification in bottom right corner of your screen. In order for the call to be connected, you must also answer the call from the Microsoft Teams or Skype for Business toast notification.
- If icePhone is configured for the user, the icePhone window will not automatically open after clicking the *Answer* button on iceBar for Web. You can use the buttons on the Contact Functions panel to handle your contact. If you need to open the icePhone window, click the *Show icePhone for selected contact* button on your iceBar for Web panel.

## Answering without the Answer Button

ice can be configured to present calls immediately to you. If this option has been selected for your contact center, iceBar for Web plays a beep in your headset, then immediately connects you to the caller.

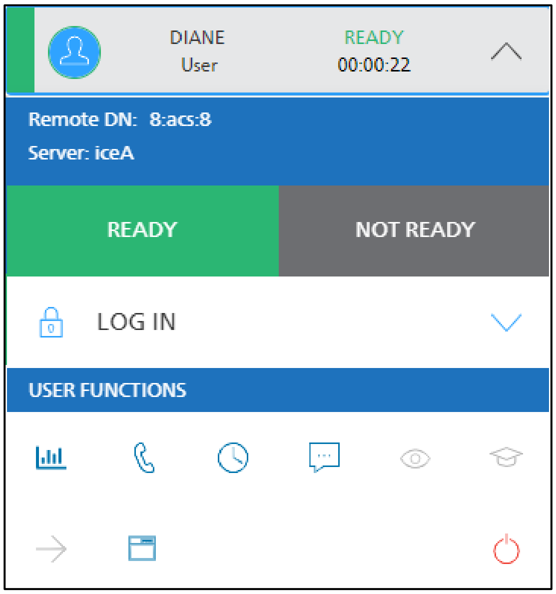
**Caution:**

- It is highly recommended to wear a headset and keep the telephone set off-hook when using this feature.
- In this scenario, it is extremely important that you enter the Not Ready state before taking off your headset. Otherwise, queued calls could be presented to your unattended workstation.

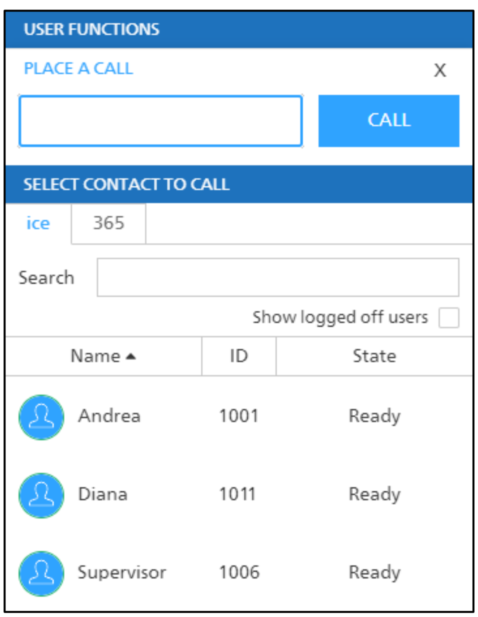
# Placing a Call

To place a call:

1. Click on the profile sidebar. The drop-down menu appears.




Select the Place Call button in the bottom left corner of the drop-down menu. The Place Call dropdown will appear below.




2. From here, you have two options: you may choose the user whom you wish to call. If the user does not appear in the list or is not an ice user, the second option is to enter the number that you wish to dial.

**Note:**

- You may also use the Contact History to initiate a call. For more information, refer to the *iceManager User Manual*.
- If you initiate a call when your ice telephone line is on-hook, ice must first place a call to you. When you pick up your ringing phone, you are connected to the number that you have dialed.
- You may also double-click on the user's name from the list to immediately place the call.

## Placing a Call with icePhone

There are two ways to place a call using icePhone: through the *Place Call* button or through the dial pad.

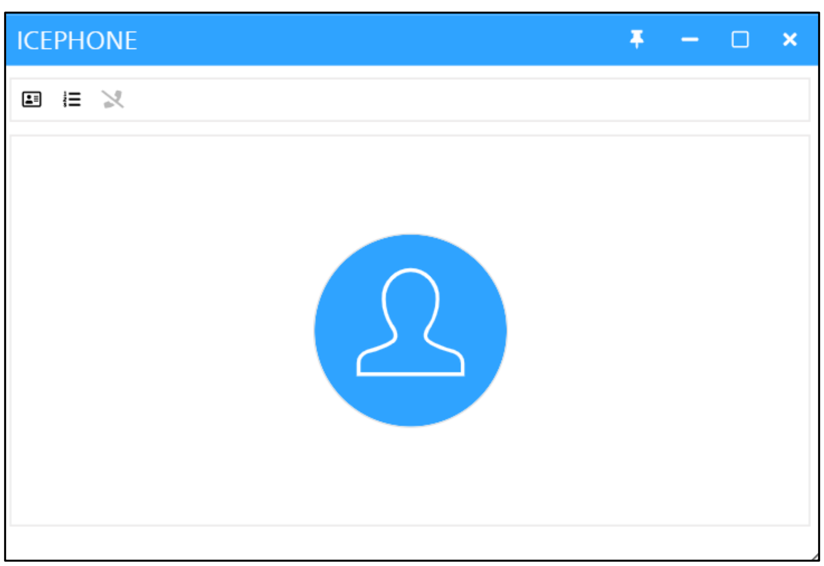
**Note**: You must have the 'Use icePhone' box enabled in order to be able to use the icePhone.

You will not have access to the user directory from ice or access to the 365 tab if you are placing a call using the dial pad.

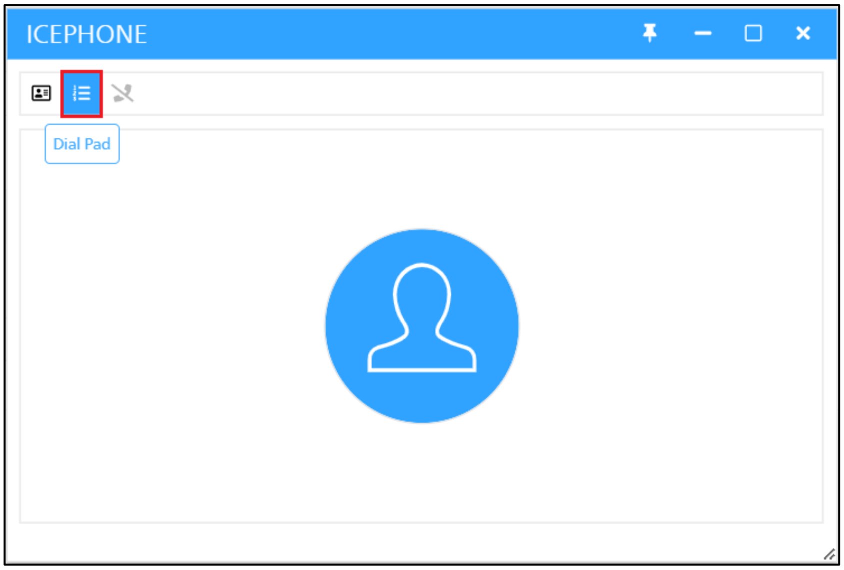
To place a call using the icePhone Dial Pad:

1. Click the *Show icePhone for selected contact* button.

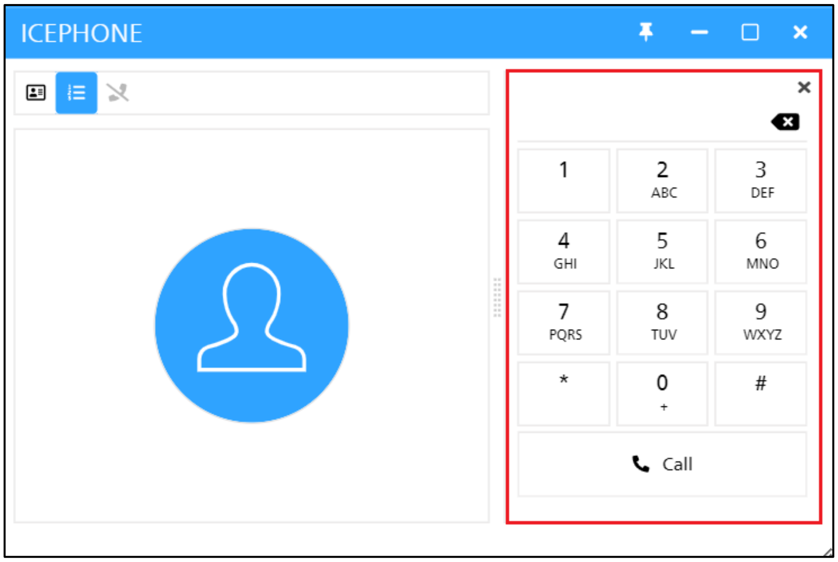
   The icePhone window will open.



2. Click the *Dial Pad* button.




The Dial Pad tab will open.




3. Enter the number that you wish to call by pressing the buttons on the dial pad. Click the *Call* button.

# Placing a Caller on Hold

When placing a call on hold, a double-beep is played in your headset, as a reminder, approximately every ten seconds. The caller hears music while on hold. Your state in the Profile Sidebar will change to “Holding Call.”


To retrieve a caller on hold, press the *Hold* button. You are now re-connected with the caller, and the ‘State’ field changes to indicate that you are once again on a call.

## Mute Button

The *Mute* button becomes available when you are on a call. To mute yourself so that the caller cannot hear your voice, click the *Mute* button on iceBar. When the Mute button is enabled, the button turns blue, and changes to *Unmute*.

Press the *Unmute* button to remove the mute so that the caller can hear you again.

# Releasing a Call

To end a call, you may click the *Release Call* button to disconnect the caller. You might notice that when the caller hangs up, the call automatically terminates after a few seconds. However, using the *Release Call* button is a faster method.

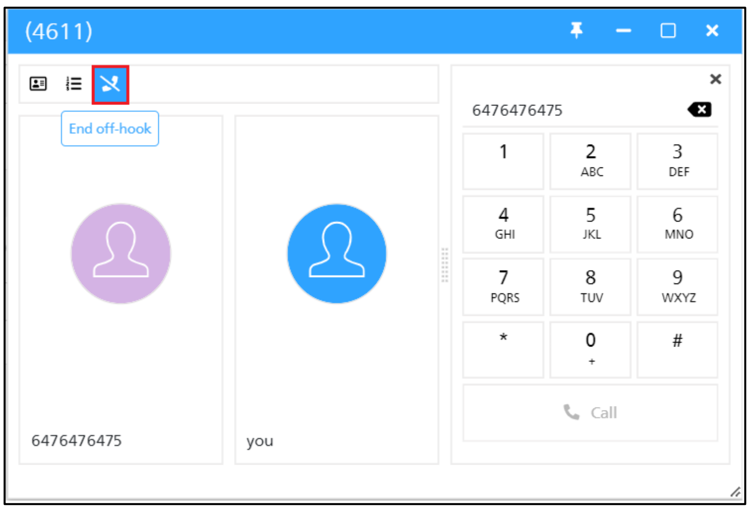
## Releasing a Call with icePhone

You can also release a call from the icePhone.

**Note**: You must have the 'Use icePhone' box enabled in order to be able to use the icePhone buttons.

To release a call using the icePhone:

1. Click the *End Off-hook* button on the icePhone client to release the contact and to place yourself back on-hook.




You may also click the *End Off-hook* button on the iceBar.

The icePhone window will remain open after clicking the *End Off-hook* button.

**Note**: Closing the icePhone window will not release the contact. You must end the call using the *Release* or *End Off-hook* buttons.

# Transferring a Call or IM

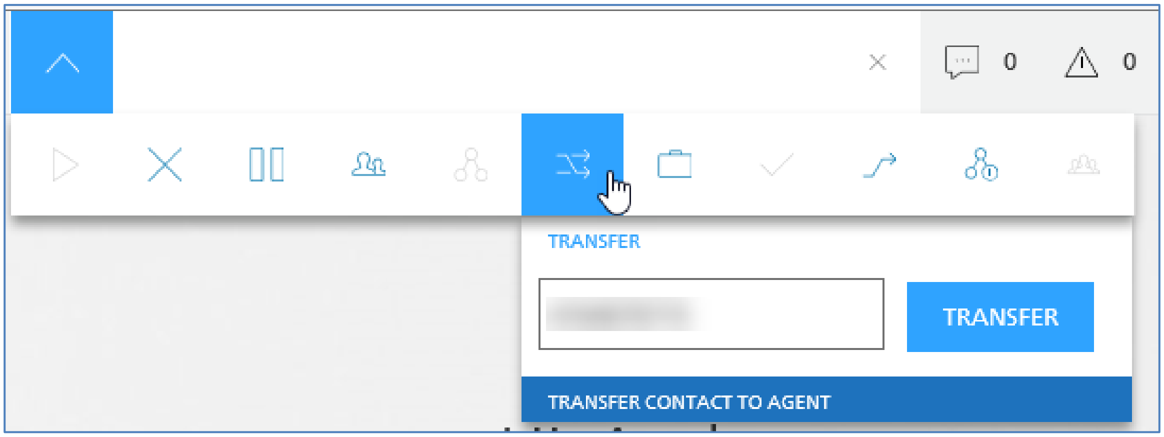
The *Transfer* button becomes available when you are on a call, IM  or in the email state. This button allows you to perform a **blind transfer** to another with the third party before they receive the contact that you are transferring. If you wish to perform a **supervised call transfer**, meaning that you will speak to the third party before you connect the original caller, refer to Consulting on page 72.

When you are on a call, have a caller on hold, or are on an IM, you may use the *Transfer* button on iceBar for Web to transfer the caller to another destination.

**Note:** The Transfer button is not available when you are in consulting or conferencing states.

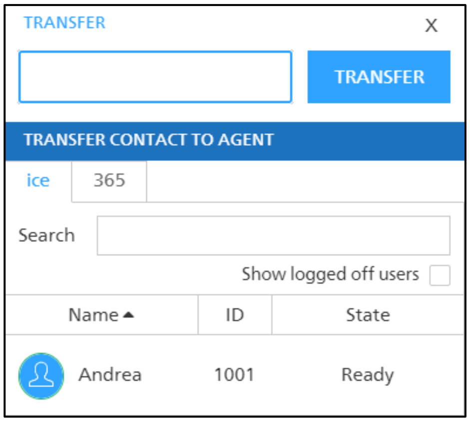
<u>To transfer a caller:</u>

1. Select the Transfer button on your iceBar for Web.




2. The above drop-down menu will appear. From here, you have two options. The first option is to enter the User ID of the user to whom you wish to transfer the call. The second option is to

select the user from the list below the dialog box. In the screenshot above, clicking on "Andrea 1001" would enter the corresponding User ID in the dialog box.




3. Now that the User ID has been entered into the dialog box, simply click the Transfer button to transfer the call to the selected user.

   The original party is immediately transferred, and you are free to handle another contact.

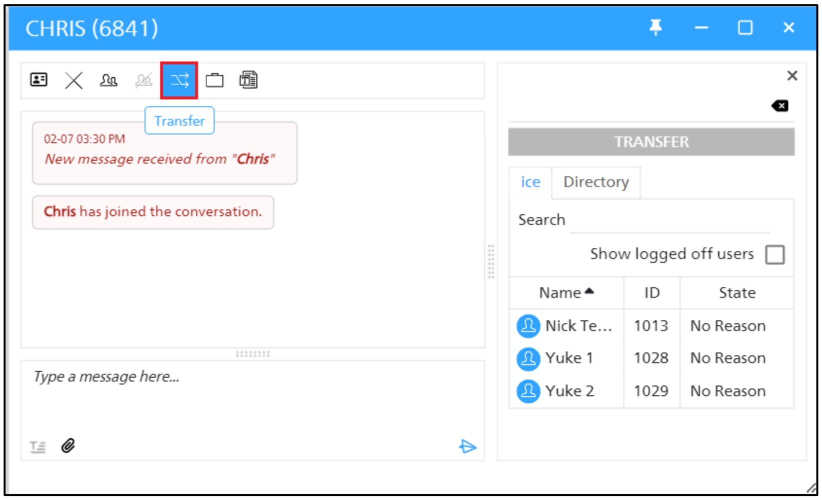
   **Note**: You may also double-click on the user's name from the list to transfer the call.

## Transferring an IM with icePhone

You can also use the Transfer button with icePhone chat contacts. To do this, click the Transfer button on the icePhone chat client window.

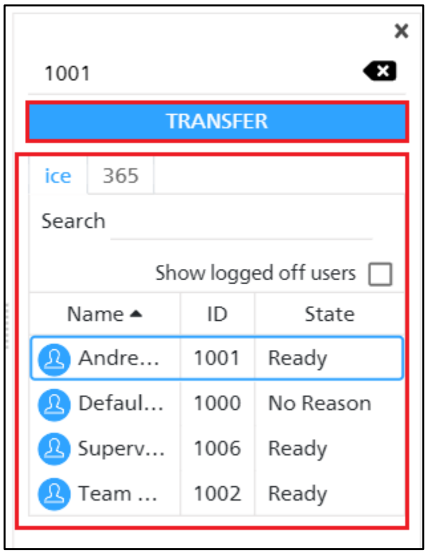
<u>To transfer an IM:</u>

1. Click the Transfer button on the icePhone while in the On IM state.



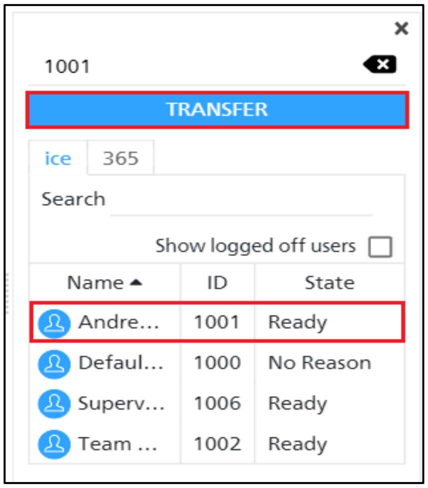

The transfer tab opens on the right.

2. Enter the Queue ID, user ID, or SIP address you would like to transfer the IM to. You can also use the ice directory below the Transfer button to see the list of users and their availability.




Only users who are designated to handle IMs and have IM addresses configured will be displayed in this list. Click on the user from the list to populate the user ID in the dialog box.

To see a list of all of the users configured for your contact center, enable the 'Show Logged off Users' checkbox.




3. Click Transfer.
   The IM will then be transferred to the destination you entered. You will be put into Wrapup or Ready state to handle the next contact.

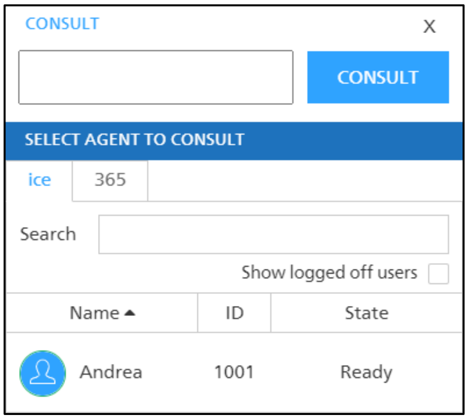
# Consulting

The *Consult* button is similar to the *Transfer* button, allowing you to transfer a caller to a third party. However, unlike the Transfer feature, Consult lets you speak to (or consult with) the person to which you are transferring the call or IM.

In the case of calls, while you are consulting with the third party, the original caller cannot hear your conversation but hears music on hold. In the case of instant messages, while you are consulting with the third party, the original IM conversation between an agent and the contact is shown to the third party and any messages sent from the third party to the agent is hidden from the contact.

<u>To start a consultation call:</u>

1. Click the *Consult* button on iceBar for Web.
2. The Consult dropdown will appear. From here, you have two options to begin a consultation. The first is to enter the User ID with whom you wish to consult in the dialog box. The second option is to select a user from the list below the dialog box. In the above screenshot, the list shows "Andrea 1001." With this option, selecting the user from the list will automatically enter the User ID in the dialog box.




3. After entering the User ID through one of the aforementioned methods, simply click the Consult button to begin the consultation.

   Upon clicking *Consult,* the original caller hears music while you are connected to the number that you entered.

**Note**: You may also double-click on the user's name from the list to start a Consultation.

Once you have initiated a consult, you then have the option of using the following buttons:

- *Release Call*
- *End Consult*

- *Conference*
- *Consult*

The button that you use next depends on the outcome of the consultation. The functionality of these buttons in relation to the *Consult* button is explained in the following section.

## Consult and Release Contact

Consider the following scenario in which you would use the *Release Call* button after initiating a consult:

You reach the person you want to consult with.

In the case of calls, at this point, you may speak freely while your original caller listens to music. If you decide to transfer your caller to the third party you have consulted with, click the *Release* button on iceBar for Web. The original party and the consulted party are connected and you are free to handle another contact. You may also hang up the receiver on your traditional telephone set to complete the transfer.

In the case of IMs, at this point, you may IM with the third party freely while the original contact waits. If you decide to transfer the contact to the third party that you were consulting with, click the *Release* button on iceBar for Web. The original contact and the third party are connected and you are free to handle another contact. You can also close the IM box to complete the transfer.

## Consult and End Consult

Consider the following scenario in which you would use the *End Consult* button after initiating a consult:

You do not reach the person you want to consult with (e.g., you get their voice mailbox, they are too busy to take the call/IM, or you never intended to transfer the call to them in the first place). You may disconnect the consulted third party and return to your original holding caller by clicking the *End Consult* button.

## Consult and Conference

a. Consider the following scenario in which you would use the *Conference* button after initiating a consult:

   You reach the person with whom you wish to consult.

   In the case of a call, after speaking to this person, you decide that the original caller should join the conversation. Click the *Conference* button, allowing for a three-way conversation. If you press the *Release* button during the conference, the other two parties remain connected, while you are free to handle another contact.

   In the case of an IM, after messaging the consulted party, you decide that the original party should join the conversation. Click the *Conference* button, which allows for a three-way conversation. If you press the *Release* button during the conference call, the other two parties remain connected, while you are free to handle another contact.

b. Consider the following scenario in which you would use the *Consult* button and the *Conference* button:

   You reach the person with whom you wish to consult and decide that a three-way conversation is the most useful option.

   In the case of a call, you may wish to discuss a topic with the original caller. To do this, you would click the *Conference* button again to end the conference. This would put the person you consult with on hold.

   In the case of an IM, you may wish to discuss a topic with the original party. To do this, you would click the *Conference* button again to end the conference.

   **Caution:** If you click *End Consult* at this point, the person currently in contact with the user (in this case, this would be the original caller) is dropped.

## Consult and Consult

Consider the following scenario in which you would use the *Consult* button after initiating a consult:

You reach the person with whom you wish to consult.

In the case of a call, after speaking to this person, you decide to speak to your original caller while the consulted party waits on hold. Click the *Consult* button to toggle between the original party and the consulted party. If you press the *Release* button while speaking to either party, the two parties are connected (the original caller and the consulted party), while you are free to handle another contact.

In the case of an IM, after messaging the third party, you decide to message the original contact while the consulted party waits on hold. Click the *Consult* button to toggle between the original party and the consulted party. If you press the *Release* button while speaking to either party, the two parties (the original party and the consulted party) are connected while you are free to handle another contact.

**Note:**

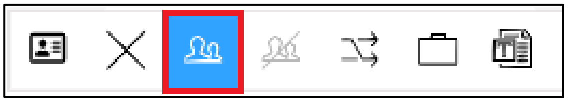
- The Consult button will be disabled for a MCH user while the user is consulting on an IM contact.
- When initiating a consultation call, the Release button will be enabled and the Consult, End Consult, and Conference buttons will be disabled.

## Consulting with icePhone

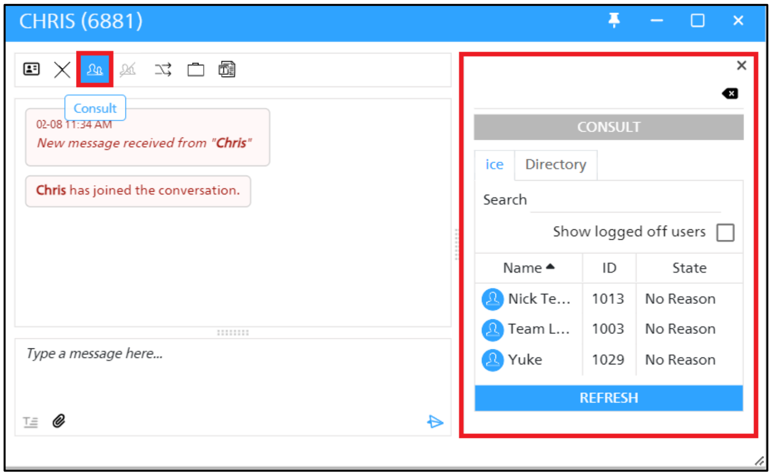
You can also use the Consult button in the icePhone. To do this, click the Consult button on the icePhone client window.

<u>To start a consultation:</u>

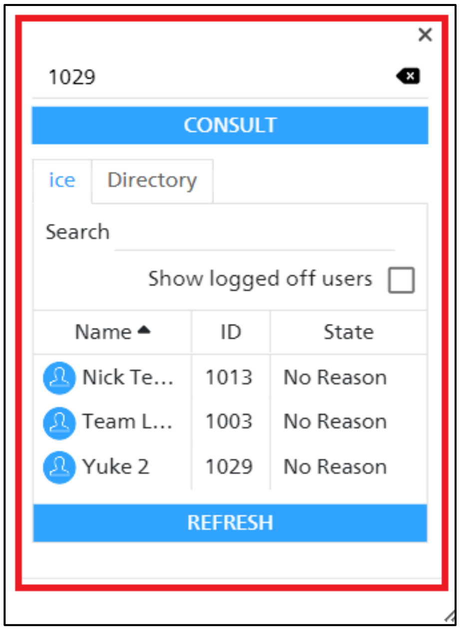
1. Click the *Consult* button on the icePhone while in the On IM state.



The Consult tab will open on the right.



2. Enter the Queue ID, user ID, or SIP address you would like to consult with. You can also use the ice directory below the Consult button to see the list of users and their availability.

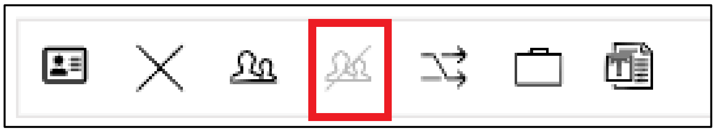


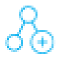

Click on the user from the list to populate the user ID in the dialog box.

To see a list of all of the users configured for your contact center, enable the 'Show Logged off Users' checkbox.

3. Click the *Consult* button to consult with the selected user.

While consulting, the End Consult button will be available. When you are ready to return to your caller, click End Consult.





Add Participant

# Multi-party Conferencing

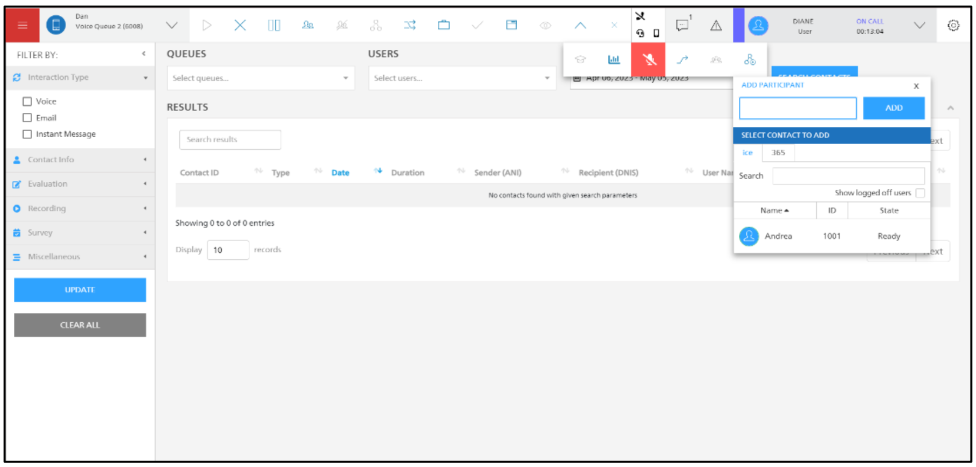
The multi-party conferencing button allows you to add multiple participants to a call. This button becomes available once you are on a call with at least one other participant.

This button works when you are on a call or in a conference

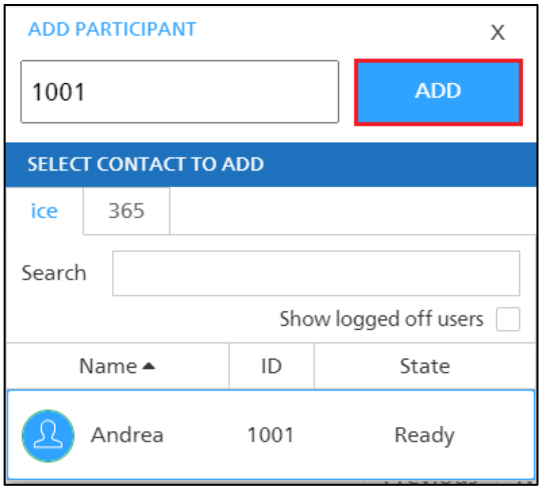
To start a multi-party call:

1. First, you must be on a call with a least one other participant.
2. Click the *Add Participant* button on iceBar for Web.

The 'Add Participant dialog box will open.



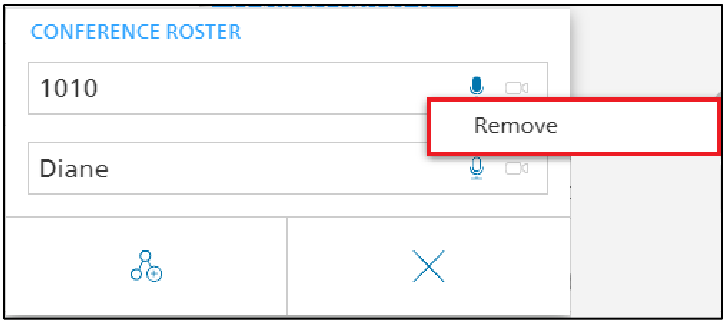

3. Enter the phone number or the sip address of the user with whom you wish to invite.
4. Click *Add* to dial the number entered.



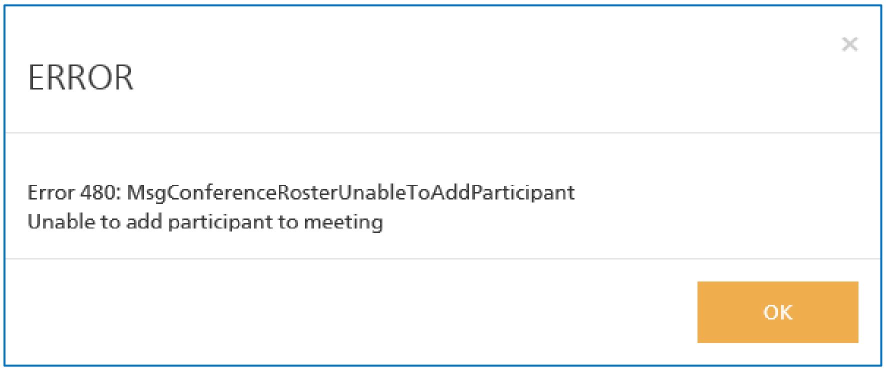
**Note**: You may also double-click on the user's name from the list to immediately add the participant to the call.

Upon starting a multi-party conference, the user's state changes to *In Meeting* and the *Conference Roster* opens to display all contacts on the call.


From the Conference Roster, you will be able to see the participant's audio and video status. By right-clicking on the participant's name, you will be provided the option to remove the participant from the meeting.




If iceBar for Web is unable to reach to contact that you have entered, the error message below will appear.



# Conferencing

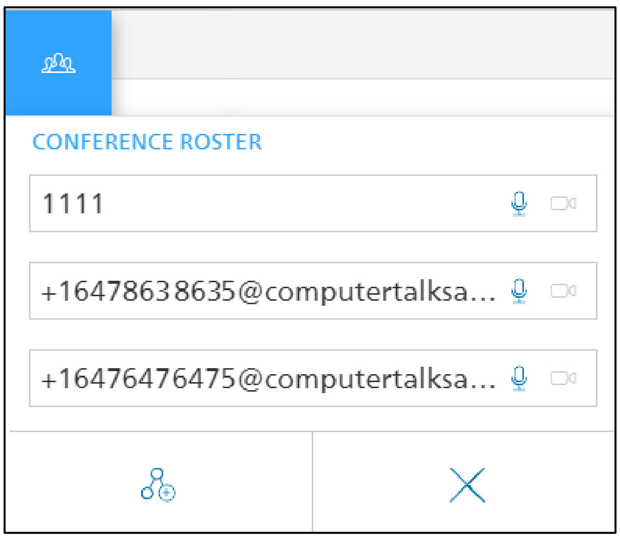
The *Consult* button allows for a three-way conversation. When you have a third party on the line, you may click the *Conference* button to initiate a conference call.

Conference Roster

# Conference Roster

The *Conference Roster* button becomes available when you are on a multi-party conference. The *Conference Roster* shows all participants on the call.

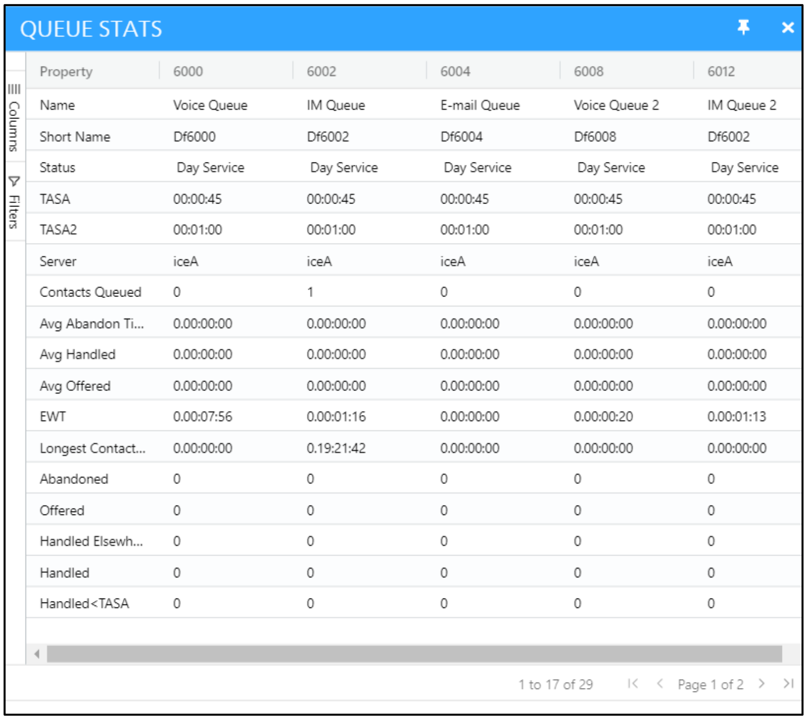
When you start a multi-party conference, the *Conference Roster* automatically opens. If you close the *Conference Roster*, you can open it at anytime by clicking on the *Conference Roster* button.




The buttons along the bottom of the Conference Roster window allow you to invite additional participants to the meeting, leave the meeting or end the meeting.

# Queue Statistics

Queue Statistics provides real-time and historical information about activity in a queue for the current day. To open, click the *Queue Statistics* button on the iceBar for. The Queue Statistics window shows you information about contacts currently waiting in queue, and contacts that have been presented to queues earlier in the day. By default, historical statistics are reset every day at midnight. For more information, refer to the *iceBar for Desktop User Manual*.




| Property | 6000 | 6002 | 6004 | 6008 | 6012 |
|---|---|---|---|---|---|
| Name | Voice Queue | IM Queue | E-mail Queue | Voice Queue 2 | IM Queue 2 |
| Short Name | Df6000 | Df6002 | Df6004 | Df6008 | Df6002 |
| Status | Day Service | Day Service | Day Service | Day Service | Day Service |
| TASA | 00:00:45 | 00:00:45 | 00:00:45 | 00:00:45 | 00:00:45 |
| TASA2 | 00:01:00 | 00:01:00 | 00:01:00 | 00:01:00 | 00:01:00 |
| Server | iceA | iceA | iceA | iceA | iceA |
| Contacts Queued | 0 | 1 | 0 | 0 | 0 |
| Avg Abandon Ti... | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 |
| Avg Handled | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 |
| Avg Offered | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 |
| EWT | 0.00:07:56 | 0.00:01:16 | 0.00:00:00 | 0.00:00:20 | 0.00:01:13 |
| Longest Contact... | 0.00:00:00 | 0.19:21:42 | 0.00:00:00 | 0.00:00:00 | 0.00:00:00 |
| Abandoned | 0 | 0 | 0 | 0 | 0 |
| Offered | 0 | 0 | 0 | 0 | 0 |
| Handled Elsewh... | 0 | 0 | 0 | 0 | 0 |
| Handled | 0 | 0 | 0 | 0 | 0 |
| Handled<TASA | 0 | 0 | 0 | 0 | 0 |

## Elevate


The Elevate button allows you to elevate a call in progress to a Skype for Business native conference. This drops ice off the call and puts the user into Not Ready state. This button is available any time you are on a call. Once you click this button, a new Skype for Business conversation window appears, and you will be able to use the Skype for Business application sharing or video call buttons. On a voice call, the remote participant will automatically be added to the conversation.

**Note**: Users who have multi-contact handling COS enabled will not be able to use the Elevate button.

# Receiving an Email

Users can receive queued or direct email contacts from ice. A **queued contact** is one that originates in a queue on ice. Users receive a contact from the queue based on the amount of time that they have been idle (i.e., since they received their last contact from a queue), and/or their skills and the skill requirements of contacts waiting in the queue.

When a user is handling an email contact, he or she enters the Email state, and ice does not direct any additional contacts to the user. The user stays in the Email state until he or she enters the Ready or Not Ready state.

A **direct contact** is one that has not originated in a queue. For email messages, this occurs when an email is routed to the user who previously handled the message.

ice can be configured so that emails and social media posts sent to a particular address are queued to a selected group of users. For example, your contact center may receive messages through support@widgets.ca. These are directed to the first available user in the Support email queue.

This functionality requires iceMail, a product within the ice suite.

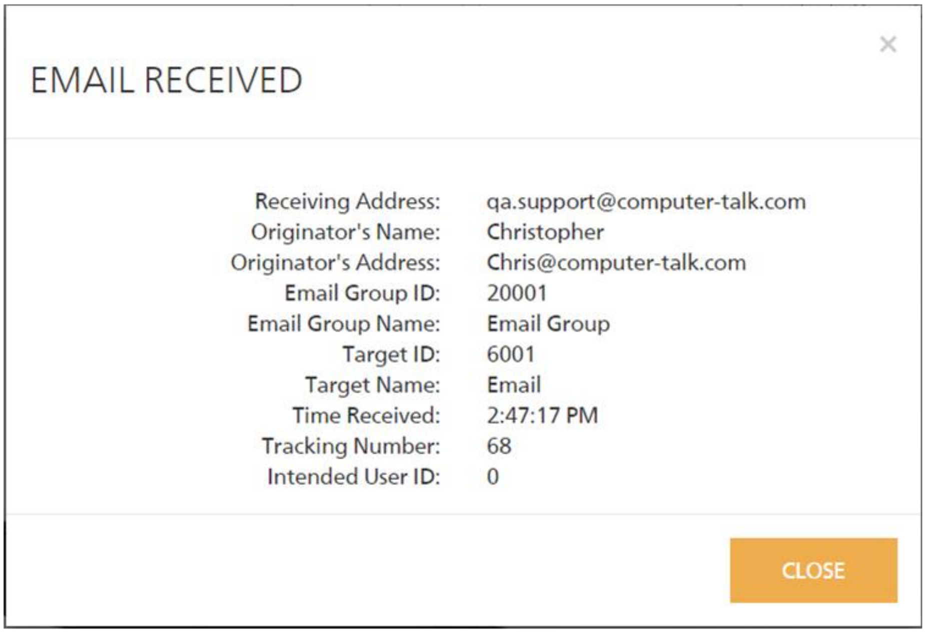
These users can be either regular users set up to handle contacts by phone or by email, or they can be dedicated email users or IM users set up to only handle email and IM contacts.

If you are logged on to a queue that receives email messages, you are notified of an incoming email with the 'Email Received' window and 'Incoming Email' dialog box. The fields displayed in the window and the dialog box are explained in the table that follows it. If you are off-hook when the email message arrives, you will also be notified by a beep in your handset or headset.

**Note:** If you have the Auto Answer Email or IM class of service, you will be presented with this window, however, the *Answer* button will be disabled. Instead, you will hear a beep in your headset and you will be immediately presented with the email message.

When an email is received, your iceBar for Web toolbar will turn blue and some details of the contact will appear. Press the Answer button to accept the email.

You will then be presented with the 'Email Received' window, as shown below.




The fields displayed on the 'Email Received' window are described in the table below:

| **Email Received** | |
|---|---|
| **Field** | **Description** |
| **Receiving Address** | The email address to which the message has been sent. |
| **Originator's Name** | The name of the message sender. |
| **Originator's Address** | The email address of the message sender. |
| **Email Group ID** | An ID number associated with the email group created by the ice administrator. |
| **Email Group Name** | A name associated with the email group created by the ice administrator. |
| **Target ID** | The four-digit ID of the queue to which the message has been directed. |

| Email Received | |
|---|---|
| **Field** | **Description** |
| **Target Name** | The name of the queue to which the message has been directed. |
| **Time Received** | The time that the message was sent from ice to the user's email address. |
| **Tracking Number** | A unique number associated with the email thread, which includes a sender's original message and any subsequent responses. |
| **Intended User ID** | The user ID of the last user that handled this email thread. Workflow can be configured to direct a reply to the user that previously handled the email thread. If the user is not logged on, the message can be directed to the queue. |

You may be presented with an email message in one of two ways:

- The email message has originated in the queue.
- The email message is a reply from the sender of a message that you have previously handled.

## Receiving an Email Message from an Assigned Queue

To receive an email message from the queue, you must be in a Ready state. When you receive a message, the 'Email Received' window appears and the Ready button changes to indicate that you are in the Email state.

If you have the Auto Answer Email or IM class of service, you may skip step 1 and proceed to step 2.

**Note:** If social media queuing is enabled for your contact center, your agents will receive posts in their email inboxes and be able to respond to those posts by responding to that email.

To handle the email message:

1. Click *Close* on the 'Email Received' window.

   **Note:** Your configuration may require you to click "Answer" on iceBar for Web to accept the email.

Notice that the sidebar has changed to indicate that you are in On Contact and the State will change to reflect that you are on Email.

2. Navigate to your email client (i.e. Microsoft Outlook, Lotus Notes, etc.), and open the new message that is in your inbox.

   The subject contains the tracking number as well as the email subject heading (e.g., Warranty Claim[00000033-138D-000003E8]).

3. When you have replied to the message, toggle the Ready button to remove yourself from the Email state.

**Note:**

- Depending on your configuration, your state may be automatically switched to Ready after a predetermined amount of time.
- Be sure to reply to the message that was directed to you through ice and not directly to the sender. If you reply directly to the sender, the email message will not be tracked through ice.

  **Example:** To correctly reply to an ice email message using Microsoft Outlook, click the *Reply* button, type your response and send the message. Your response is directed through ice to the sender and the sender will see the "system" email address when they receive your reply, rather than your email address. Your response and any subsequent responses from the customer will be tracked through ice.
- It is possible to handle more than one contact at a time. For example, you can make yourself Ready while responding to an email message and answer a call or receive another email message from the queue. However, this will skew statistics for your time in the Email state.
- If you are including additional recipients, you may add their email addresses in the *to* and/or *cc* field. In order for your email to remain tracked through ice, ensure that you keep the iceMail address in the *to* field. For more information, please refer to the *iceMail User Manual*.

## Receiving a Direct Email

If user A is responding to a message, and the customer is sending a reply to user A's response, user A. This is a customization accomplished through Workflow. In this case, when user A receives this message, it is a direct email contact because it did not originate from a queue. If user A is in the Ready state, the message is presented to the user as described in the previous section.

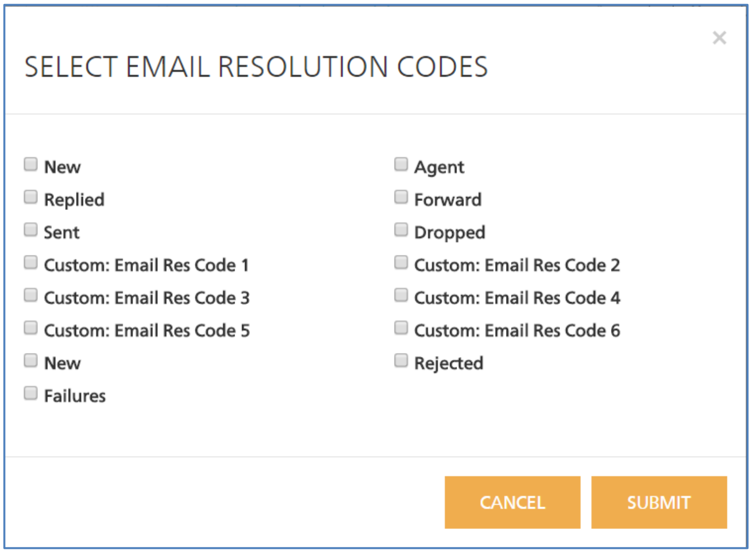
ice can be configured to direct the reply to you instead of sending the email message to the queue. In this case, if you have handled a message, the sender directly replies to the message that you sent. If you are in the Ready state, the message is presented to you as described in the previous section.

Users can attach Resolution codes to direct and queued emails that they are handling, using the Apply Resolution Code button in iceBar. The codes are tracked in iceReporting and are configured in the iceBar configuration files. Email Resolution Codes apply to direct emails as well as queued emails. The option to add new/custom resolution codes are a feature available for Team Leads, Supervisors and Administrators.

Selecting a Resolution Code

1. The Apply Resolution Code button is activated once the user accepts an email (i.e., goes into the On Email state).

2. Once you click the button, a window containing a list of Resolution Codes opens.



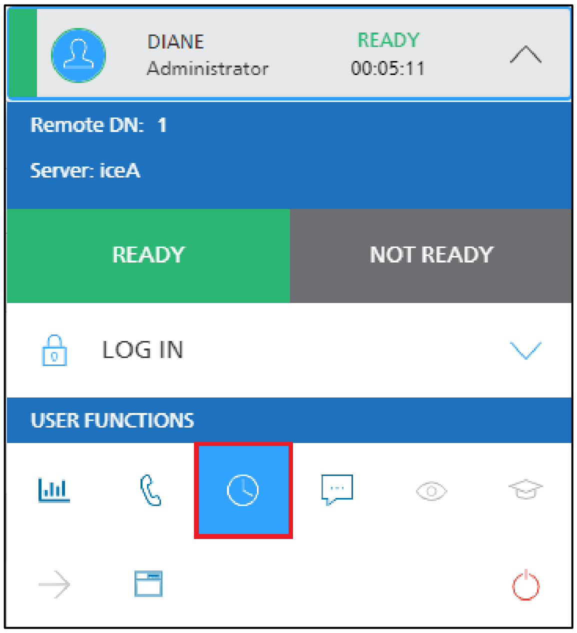

3. Click on the appropriate Resolution Code. It will grey out after you press Submit. It will continue to be greyed out if the resolution code form is re-opened while still on the same contact.

   **Note:** If you accidentally clicked the wrong Resolution Code, you can overwrite your selection by clicking on another Resolution Code.

4. The Resolution Code is attached to that email and the user can move onto the next contact in the queue.

**Note:** If Force Resolution Code is enabled, users must select a resolution code before they can change their state to Ready. If Force Resolution Code is not enabled, users can change their state to Ready before they select a resolution code.

If Force Resolution Code is not enabled, users can go back to apply a Resolution Code. To do so, click the Contact History button in the Profile sidebar.




Clicking the Contact History button opens iceJournal. For more information, refer to the *iceManager User Manual*.

# Replying to Sender

To reply to a message that you receive, simply click the reply button and type the message. The message is sent to an internal address that is managed by the email server.

ice retrieves the message, processes it, and then sends the message to the original sender. This processing allows the message to be tracked.

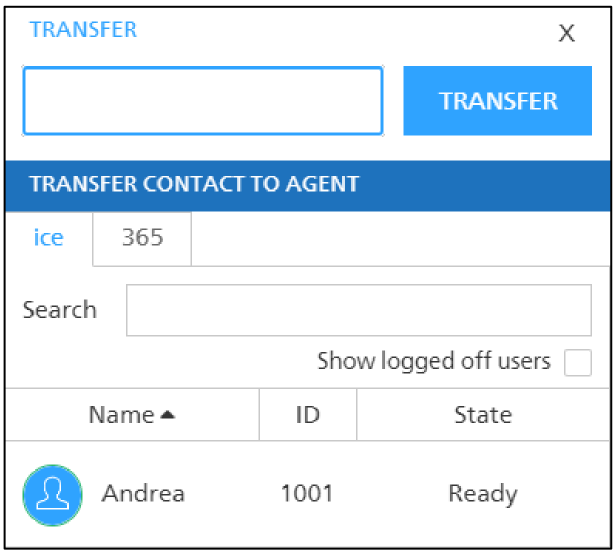
**Note:** If the user replies directly to the sender's email address, the email message would no longer be tracked through ice.

# Transferring an Email

An active email received through ice can be transferred through iceBar for Web to another ice user, a Workflow DN, or an external email address. This is useful in cases where emails arrive in the wrong queue, or when emails arrive at the contact center incorrectly. For example, consider a support contact center receiving an email pertaining to a new sale; this email needs to be forwarded out of ice to the sales department.

## To transfer an email to another iceBar user

1. While in the On Email state, click the transfer button on iceBar.
   The Email Transfer drop-down appears.




2. Enter the User ID to whom you wish to transfer the email, or select the user from the list. Once you have selected a User ID, press the Transfer button.

**Note:** Emails can also be transferred to a Workflow DN or an external email address. To use one of these methods, simply enter the DN or email address in the bar and select the Transfer button.

# Receiving an IM from Queue

ice can be configured so that instant messages and web chats are queued to a selected group of users. For example, your contact center may receive messages through a Live Chat button on your website: [mailto:support@widgets.ca](mailto:support@widgets.ca). These are directed to the first available user in the Live Chat queue.

This functionality requires iceIM Web chat, a product within the ice suite.

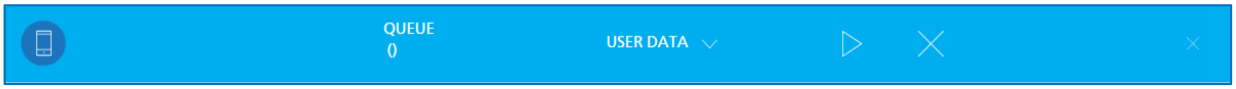
These users can either be regular users set up to handle multiple modalities or they can be dedicated IM users set up to only handle IM contacts.

If you are logged on to a queue that receives IMs, you are notified of an incoming IM with the 'Incoming IM' message at the top of the page. If you are off-hook when the IM arrives, you will also be notified by a beep in your handset or headset.

**Note:**

- If you have the Auto Answer Email or IM class of service, you will be presented with this message, however, the *Answer* button will be disabled. Instead, you will hear a beep in your headset and you will be immediately presented with the IM.
- If SMS is enabled for your contact center, your agents will receive them in the same client that they use to respond to IMs and web chats. For more information, refer to Receiving an SMS from Queue.

To receive an IM from the queue, you must be in a Ready state. When you receive a message, the 'Incoming IM' dialog box appears:




To handle the IM:

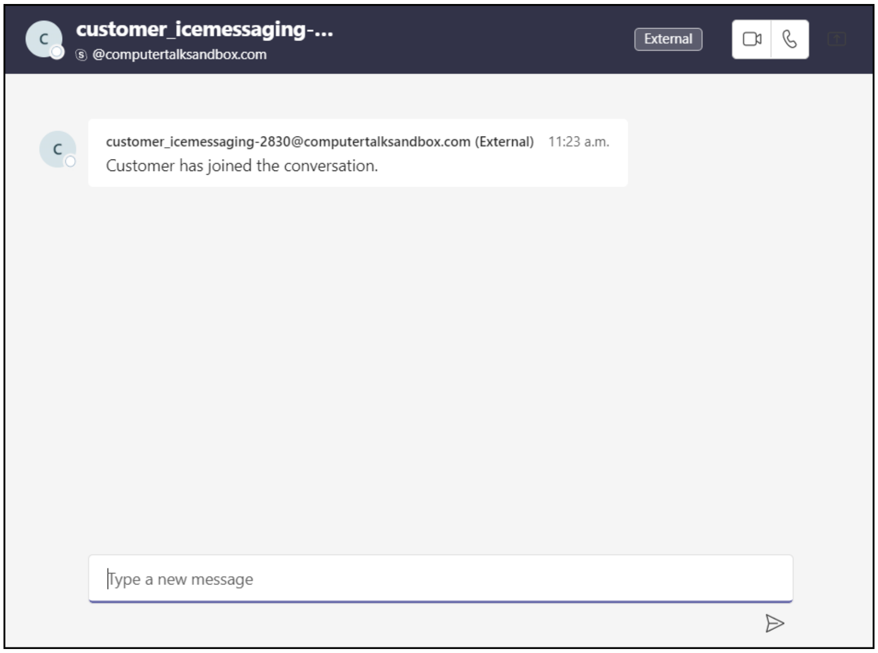
**Note:** If you have the Auto Answer Email/IM class of service you may skip step 1 and proceed to step 2.

1. Click *Answer* on the 'Incoming IM' message.

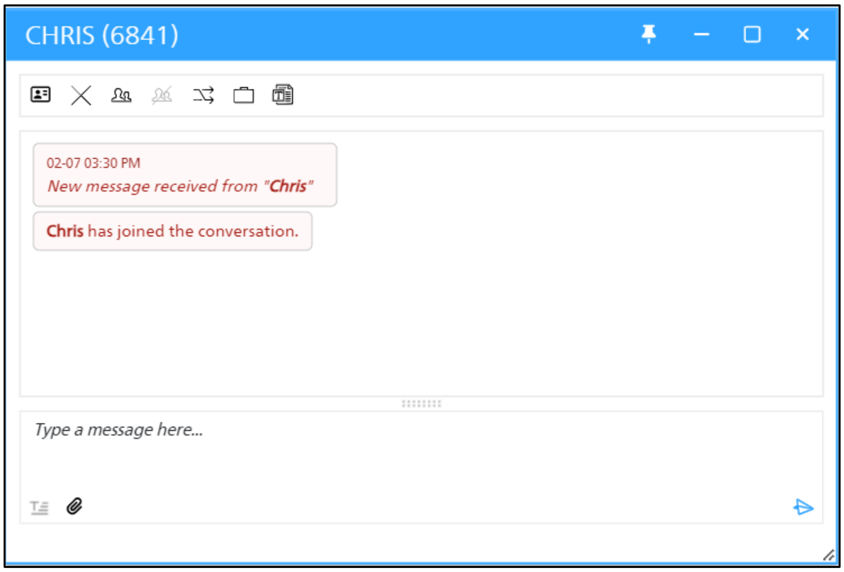
   Notice the profile sidebar changes to indicate that you are in the IM state.

2. The Microsoft Teams client opens.

The IM conversation window will appear after you click the Accept button.




If you have icePhone configured, the icePhone client will open with the IM conversation after you click the Answer button.




The IM content is located in the upper text box. Type your response in the lower text box and hit the 'Enter' key on your keyboard to send the message. If you wish, you can resize the IM window using your mouse.

While users are composing the response, webchat users would see a “User is typing” notification. If an alias is set in iceAdministrator, it will be replaced with “Alias is typing…”

**Caution:** The ‘Enter’ key does not act as a carriage return; anything you have typed in the text box will be displayed to the recipient as soon as ‘Enter’ has been pressed.

3. Once you have finished the conversation, you can end the contact by click the *Release* button on your iceBar.

You will automatically be put into the Ready state unless you have the Wrapup state enabled.

**Note:** If you have the Allow Multiple IM Handling class of service feature, you will need to click Ready to remove yourself rom the IM state.

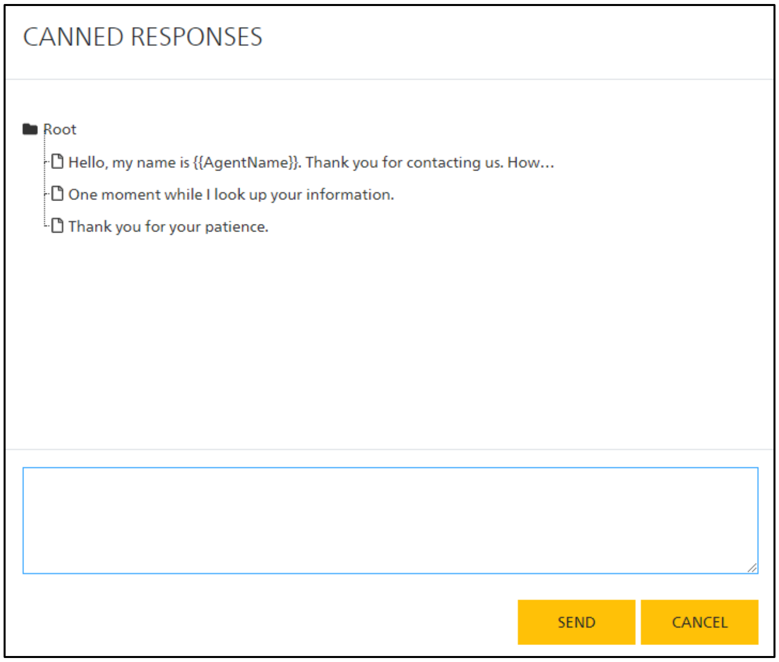
4. Click the *Ready* button to remove yourself from the IM state.

## Canned Responses

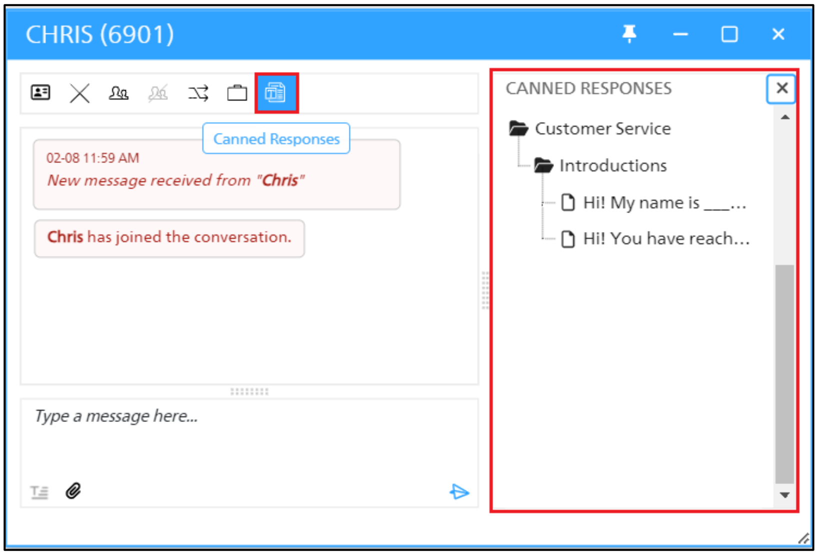
Canned responses are predetermined responses to common questions. Users can select a canned response from a list of global responses during an instant message conversation. Canned Responses can be configured as part of your iceBar configuration. For more information on the iceBar configuration, please refer to the *iceManager User Manual*.

**Note:** Only 'Server' mode should be used for Canned Responses used through iceBar for Web.

If Canned Responses are enabled, they will appear as a separate window.

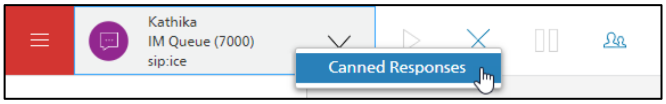



If you have icePhone configured and if Canned Responses are enabled, the Canned Responses button will be available within the icePhone client window.

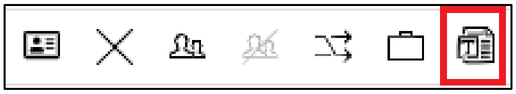


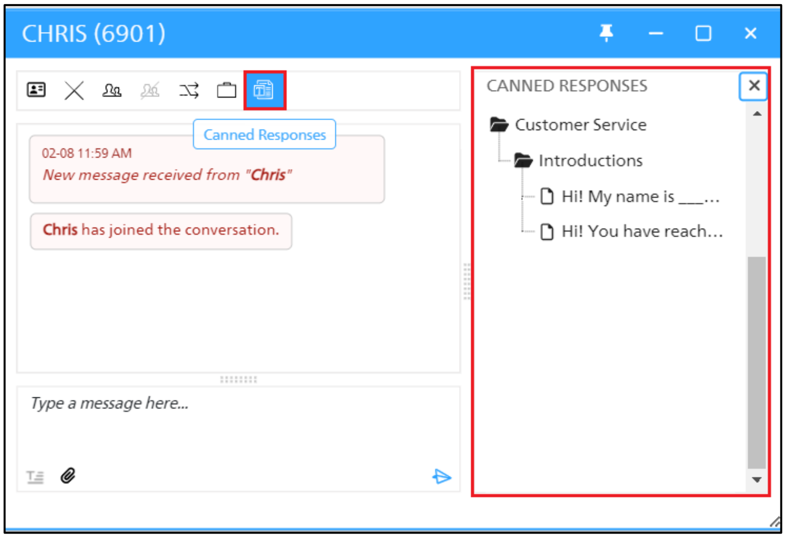

To open and use the canned responses in the list:

a) Right-click on the Contact Details panel, and select Canned Responses.

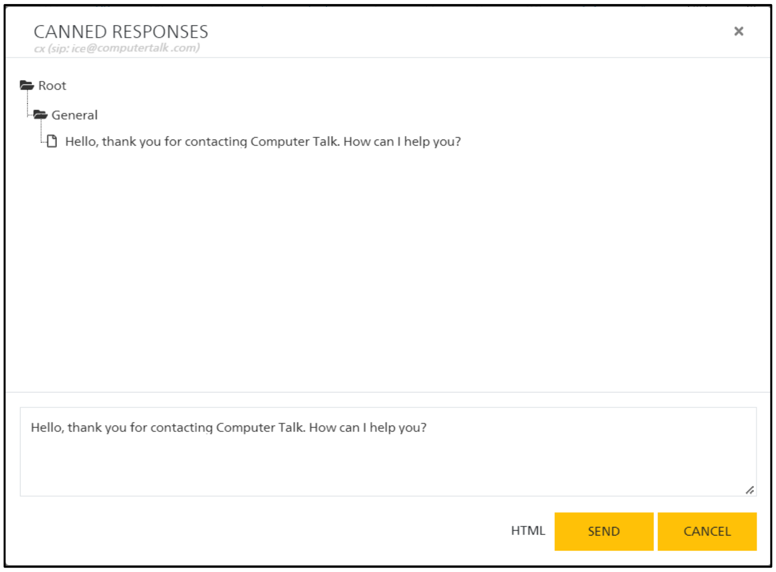



If you are using icePhone, you can also click the *Canned Responses* button on the icePhone client to open the Canned Responses tab.

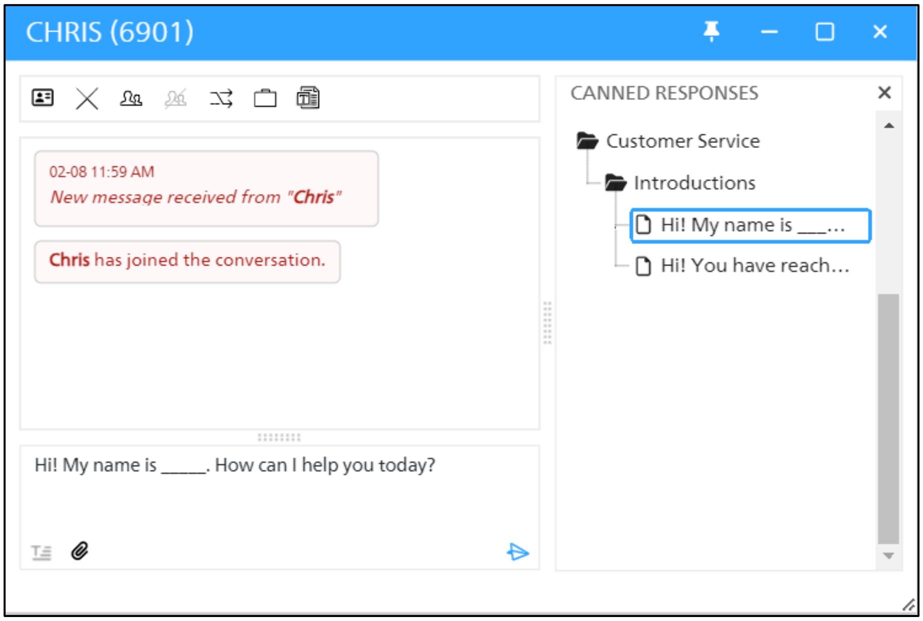




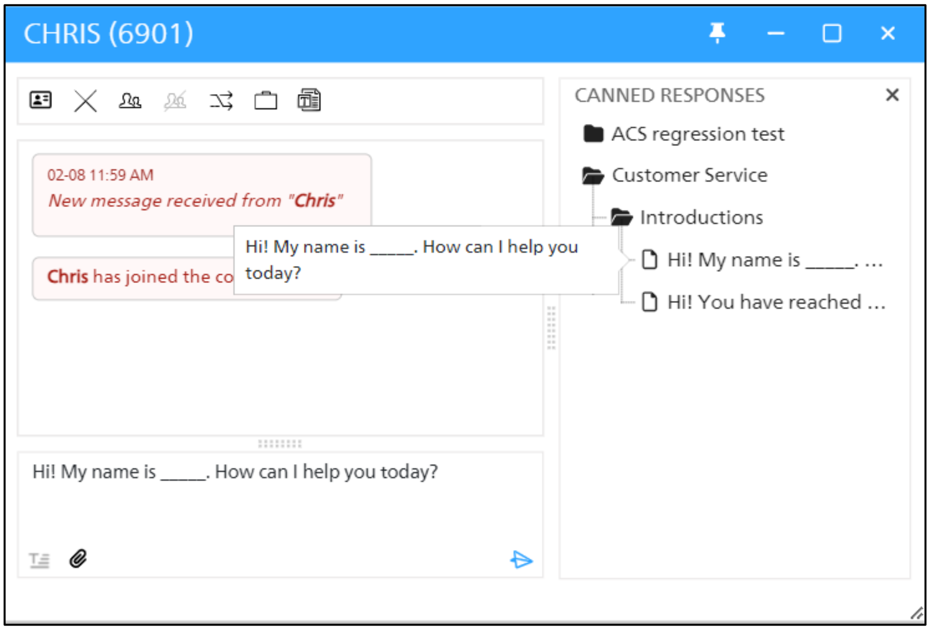

b) Select a Canned Response from the list




If you are using icePhone, click on the canned response you would like to enter. The text will populate in your message box.




You can also hover over the canned response to see a preview of how the text will render in the chat.




c) Select the SEND button. The window remains open for you to select other responses from the list at any time.

d) To close the window, select the CANCEL button at any time.

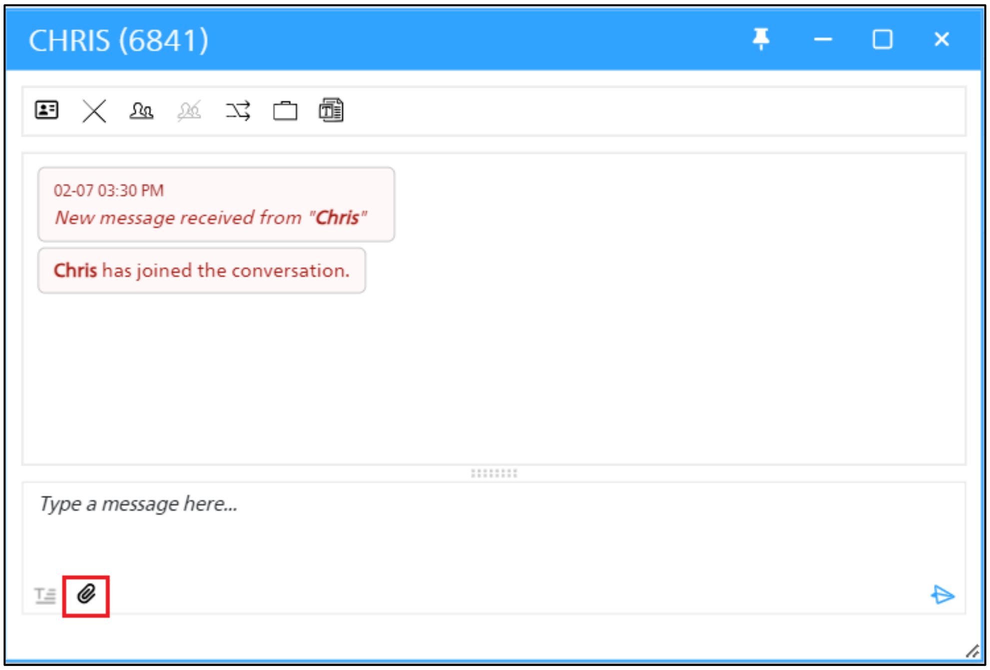
If you are using icePhone, you can click X to close the Canned Responses tab at any time.

**Note**:

- If you close your window while on an active chat, the window will pop up once the other participant replies.
- If you minimize the window while on an active chat, the icon on your taskbar will flash to indicate that you have a new message.
- If you are using icePhone, closing the icePhone client will not release the contact. To release the contact, click the *End Off-Hook* button or the *Release* button.
- If you are using icePhone, click the *Hide icePhone for selected contact* button to hide the icePhone client. Click the *Show icePhone for selected contact* button to open the icePhone client at any time.
- To configure the canned responses on your system, refer to the *iceManager User Manual*.

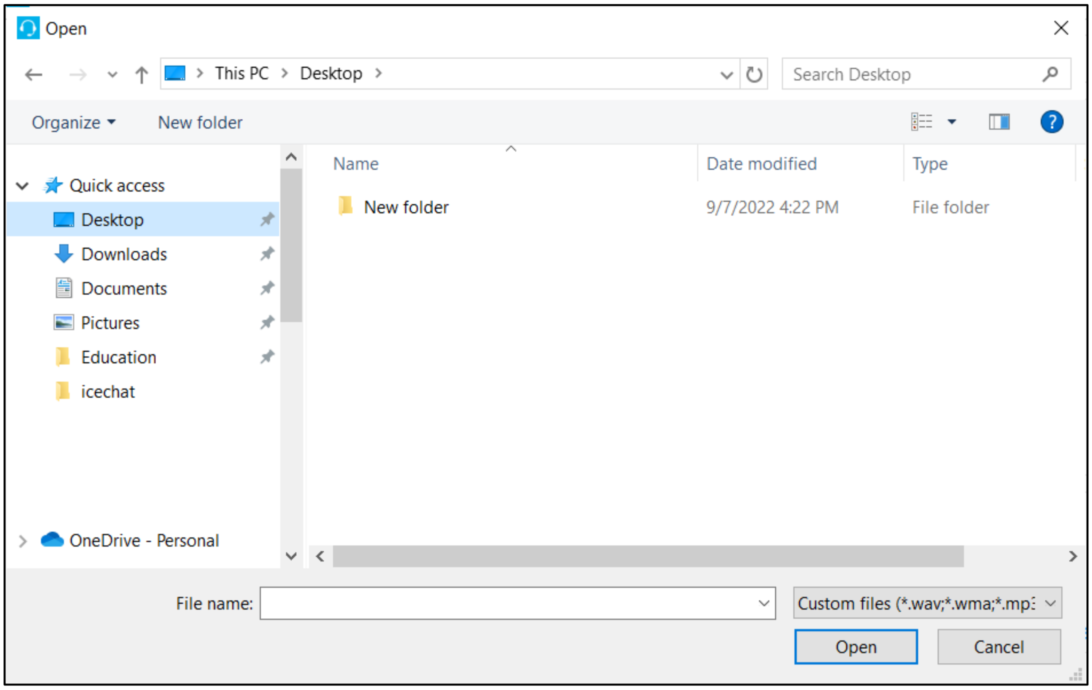
# Using Contact Attachments

The Contact Attachments button on the icePhone chat client allows the user to select a file from their local machine to upload in the chat window. When this button is selected, iceBar for Web will open the file explorer window which will allow the user to select an attachment to upload in the chat. To use contact attachments, this feature must be enabled in the user's chat configuration settings in iceManager. For more information, please refer to the *iceManager User Manual*.

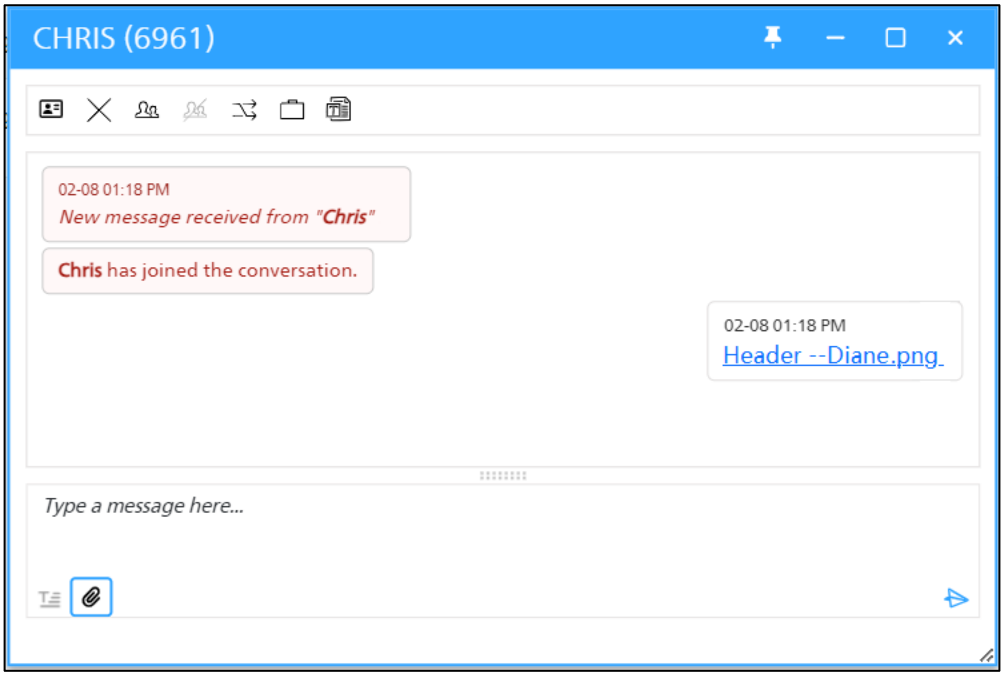



To upload a file in the chat:

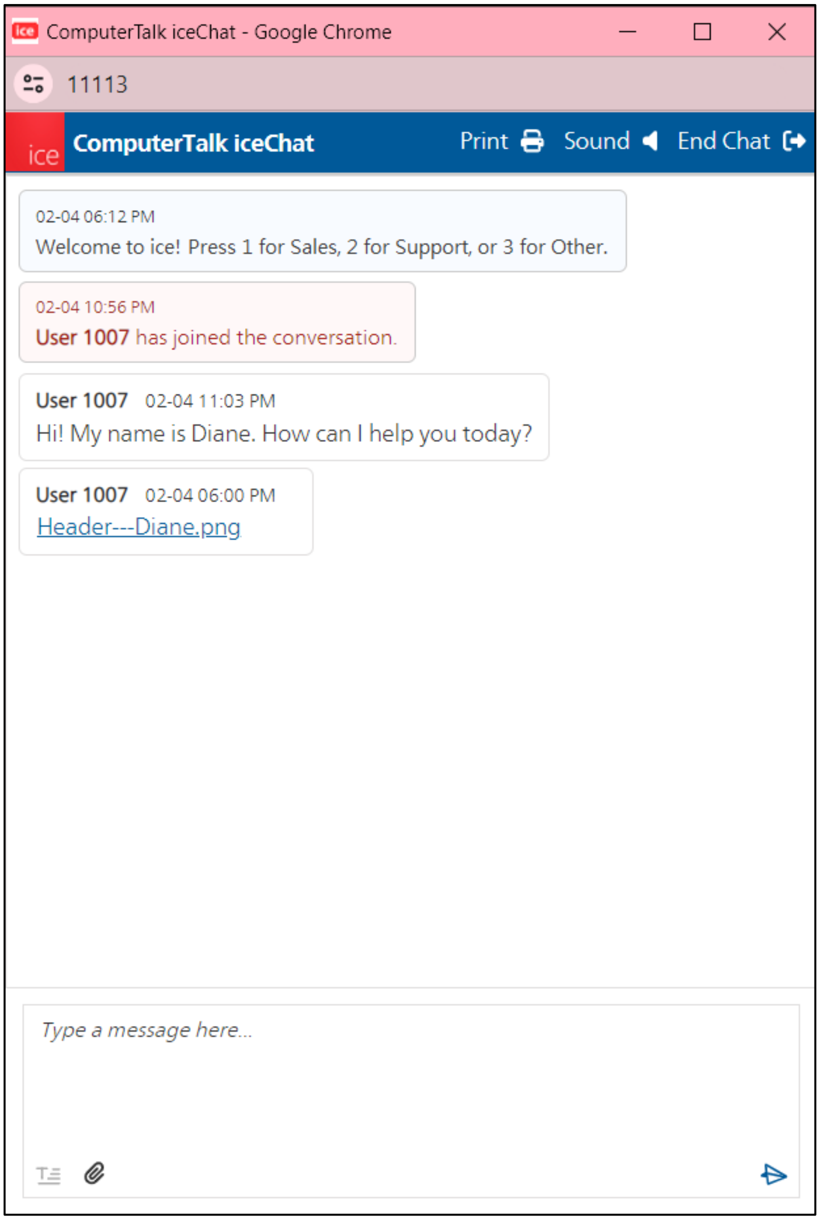
1. Click the "Upload File" button. Icebar for Web will open the file explorer window on your local machine.




2. Select a file to upload in the chat.



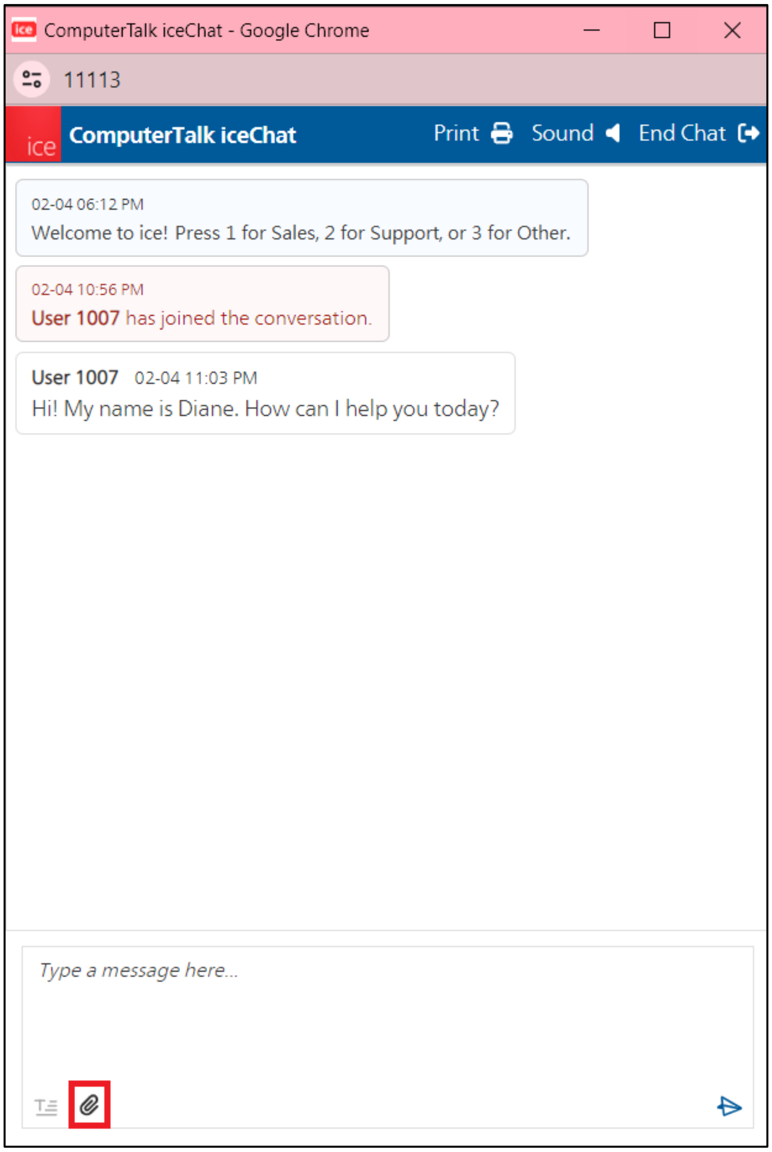

Once a file has been uploaded, the website visitor will be able to open the file in their local machine.



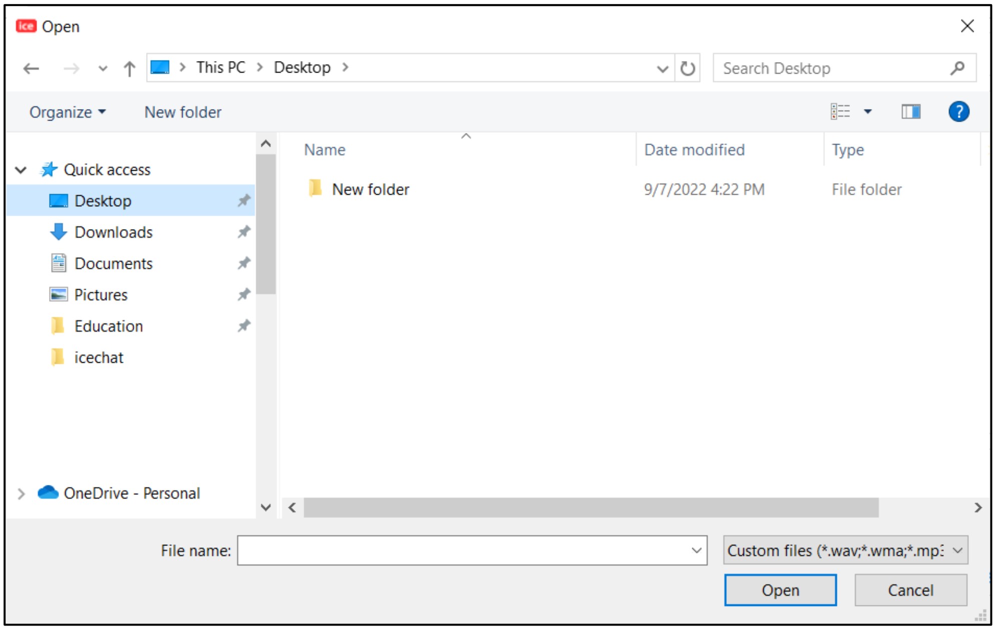

**Note:** Once you have selected an attachment to upload in the chat, it cannot be recalled or cancelled. The attachment link will only be valid for the amount of time specified in the Contact Attachment settings.

Please refer to the *iceManager User Manual* for information on the Contact attachment settings.

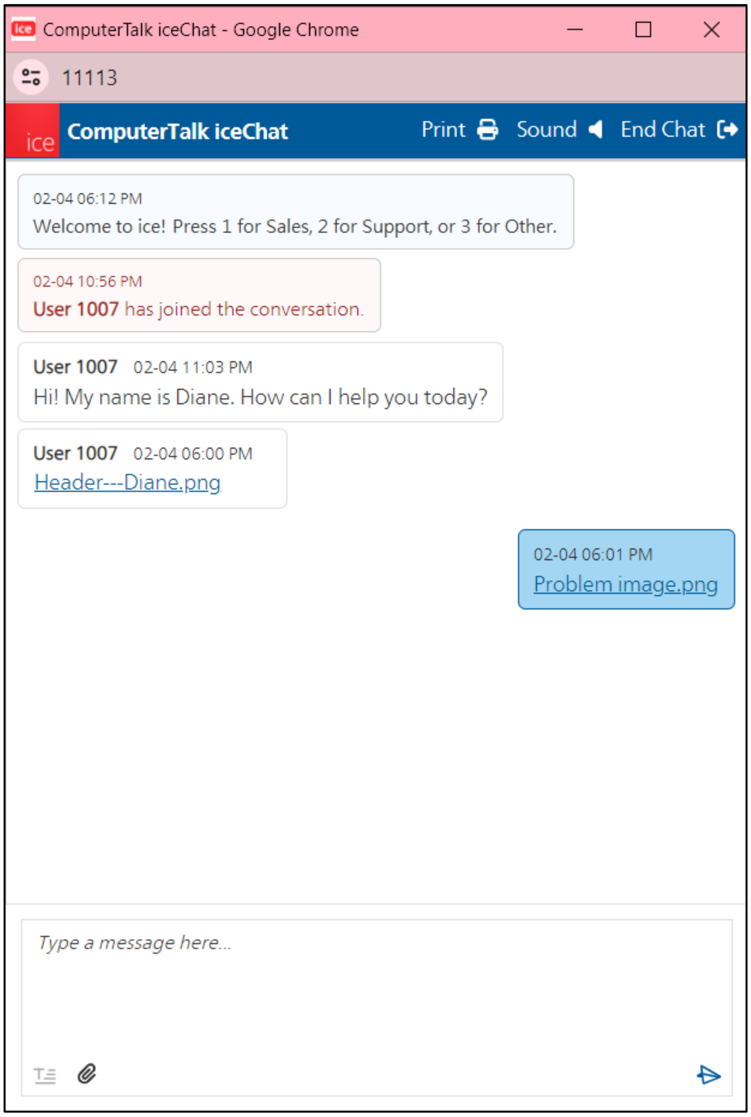
Website visitors can also upload files in the chat by clicking the Contact Attachment button located on the bottom left of the chat window.




The file explorer window will open allowing the website visitor to select a file to upload in the chat.




Once a file has been selected, it will be sent in the chat for the user to view.




For more information on iceChat buttons, please refer to the *iceChat User Manual*.

## Receiving an SMS from Queue

ice can be configured so that SMS messages are queued to a selected group of users. For example, your contact center may receive messages through a short code or long code number. Those messages are routed to the appropriate users, based on the routing logic that was configured for the contact center.

This functionality requires iceChat, a product within the ice suite.

These users can either be regular users set up to handle multiple modalities or they can be dedicated SMS users set up to only handle SMS contacts.

If you are logged on to a queue that receives SMS messages, you are notified of an incoming SMS with the 'Incoming IM' message. If you are off-hook when the SMS arrives, you will also be notified by a beep in your handset or headset.

**Note:**

- If you have Auto Answer Email or IM class of service, you will be presented with this window, however, the *Answer* button will be disabled. Instead, you will hear a beep in your headset and you will be immediately presented with the SMS message.

# Line of Business Codes

While handling a contact you may press a Line of Business (LOB) code to signify that an important criterion has been met. The ice administrator must define how these codes are to be used, but they are generally used to track information about the contact. For example, you may be asked to press LOB-1 when you receive a customer complaint or LOB-2 if the caller is inquiring about a new product.

By default, Line of Business codes are not forced, meaning that you do not have to choose a LOB code for each contact. Global settings can be modified so that Line of Business codes are forced, in which case you must choose a LOB code before you are able to use any other iceBar for Web feature. For more information on global settings, refer to Appendix A: Global Settings.

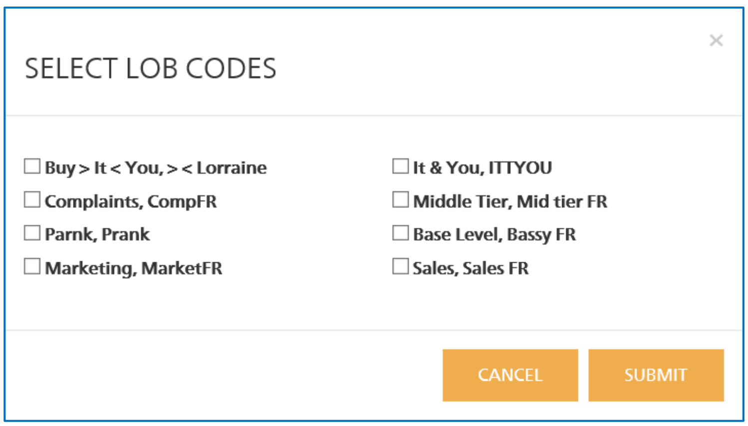
Users with Team Lead access level or higher can modify Line of Business codes in the iceManager settings. For more information, refer to the iceManager user manual.

## Using Line of Business Codes

To use a Line of Business code:

1. While you are handling a contact, click the LOB button on the iceBar for Web toolbar.

   The 'Select LOB Codes' dialog box appears.




2. From the 'Select LOB Code' dialog box, click the appropriate LOB code(s) and click Submit. The dialog box will close once the minimum number of LOB codes have been selected.

Your ice administrator will have given you appropriate codes. The LOB code that you last used will have a check beside it. You may also close the dialog box if you decide not to choose a LOB code.

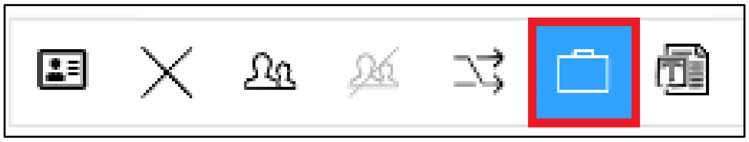
**Note:** Line of Business codes can be created and modified by the ice administrator (e.g., "Widget A Sales" can be modified to show "VIP Customer"). For more information, refer to the iceManager user manual.

## Using Line of Business Codes with icePhone

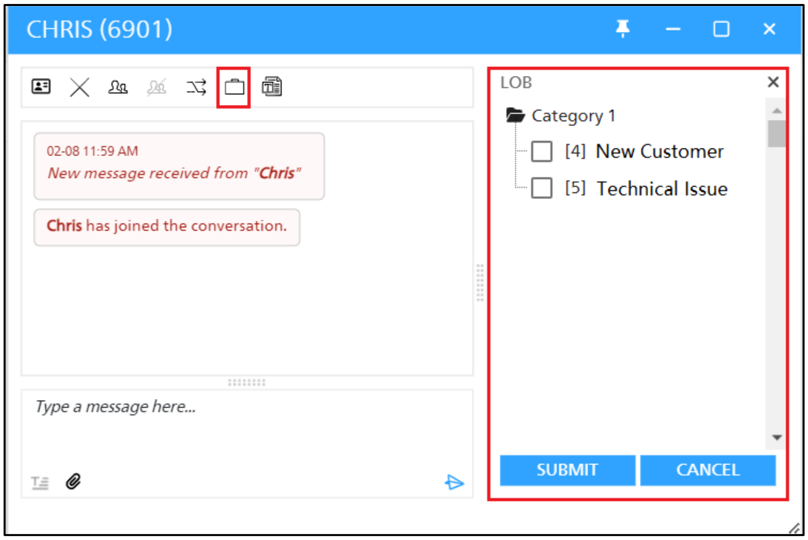
You can also use the Line of Business codes (LOB) button within the icePhone. To do this, click the LOB button on the icePhone client window.

To use a Line of Business code:

1. Click the *LOB* button on the icePhone.



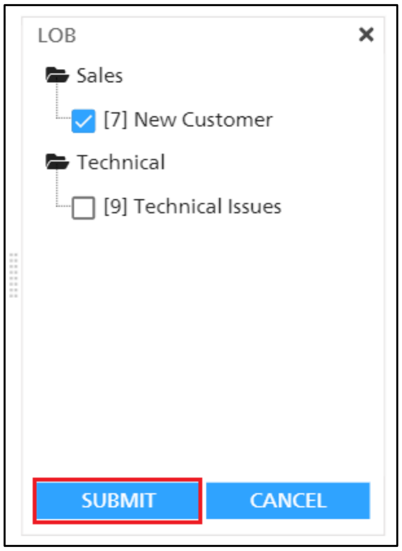
The LOB tab will open on the right.




2. Select the code(s) that apply.

If you do not know the meaning of the codes, check with your supervisor.

3. Click the Submit button to submit the Line of Business Code(s) associated with the contact.




To close the LOB tab, click on the 'x' in the top right corner, or click on the LOB button again.

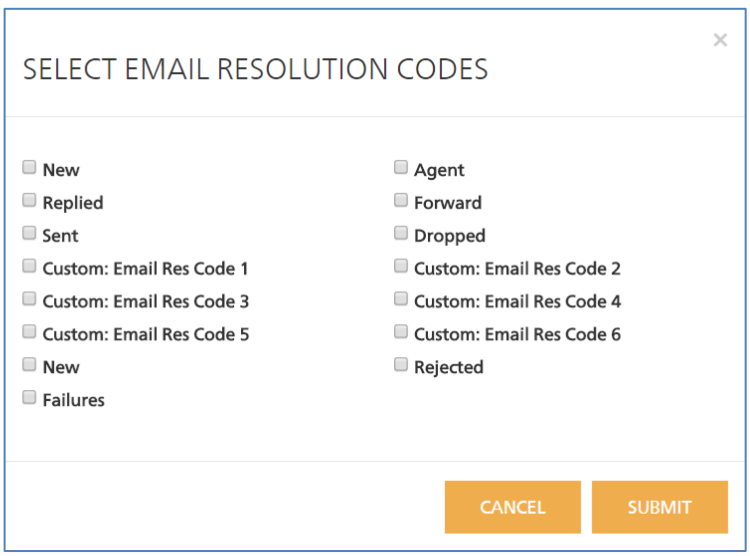
# Email Resolution Codes

Users can attach Resolution codes to direct and queued emails that they are handling, using the Apply Resolution Code button in iceBar for Web. The codes are tracked in iceReporting and are configured in the iceBar for Web configuration files. Email Resolution Codes apply to direct emails as well as queued emails.

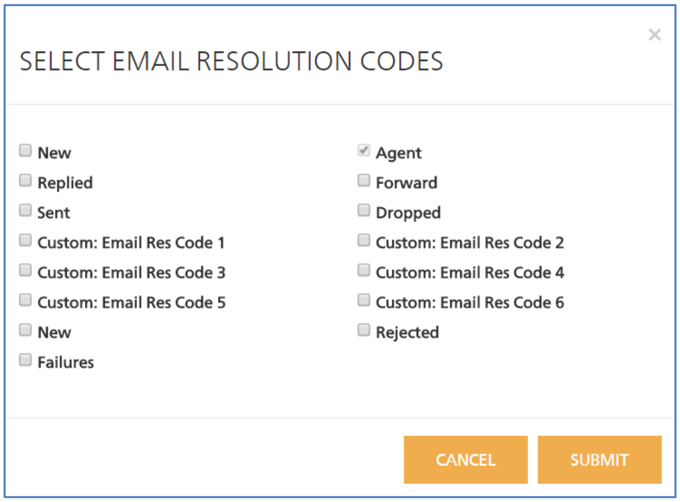
Selecting a Resolution Code

1. The Apply Resolution Code button is activated once the user accepts an email (i.e., goes into the On Email state).


2. Once you click the button, a window containing a list of Resolution Codes opens.




3. Click on the appropriate Resolution Code. It will grey out after you press Submit. It will continue to be greyed out if the resolution code form is re-opened while still on the same contact.



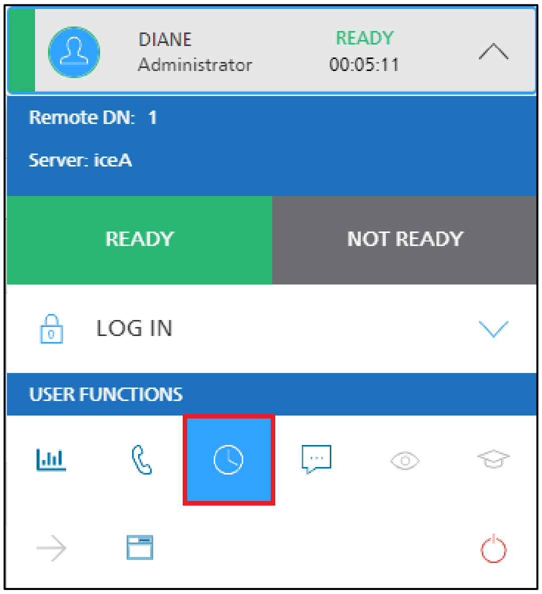

**Note:** If you accidentally clicked the wrong Resolution Code, you can overwrite your selection by clicking on another Resolution Code.

4. The Resolution Code is attached to that email and the user can move onto the next contact in the queue.

# Contact History

Recently handled or missed contacts. This can include clients that you have called, contacts that you have received from a queue, or direct contacts received. , or direct contacts received.

Any previous call from your Contact History can be called. To open Contact History, click the profile sidebar. From the drop-down that appears, select the Contact History button in the bottom left corner. Your Contact History will open in iceJournal. For more information, refer to the *iceManager User Manual*.

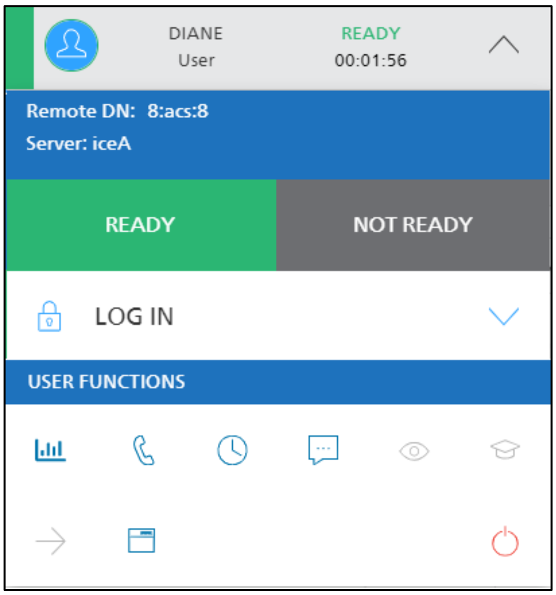


# Quick Text Messaging

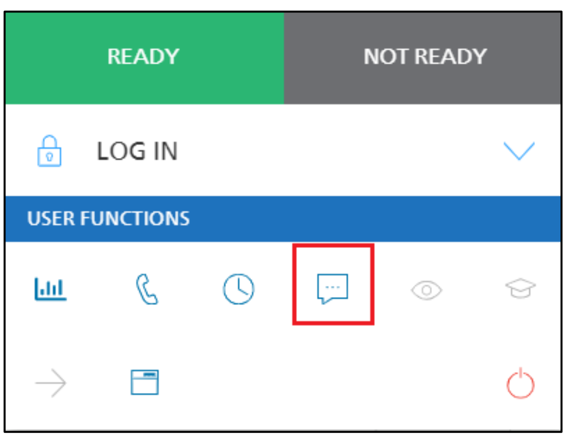
Quick Text messaging is available through iceBar for Desktop, iceBar for Web, iceAdministrator, or iceMonitor. In order for you to receive a message that someone sends to you, you must have the iceBar for Web open, but you do not have to be logged on.

To send a message to another user:

1. Click on the profile sidebar to open the drop-down menu.



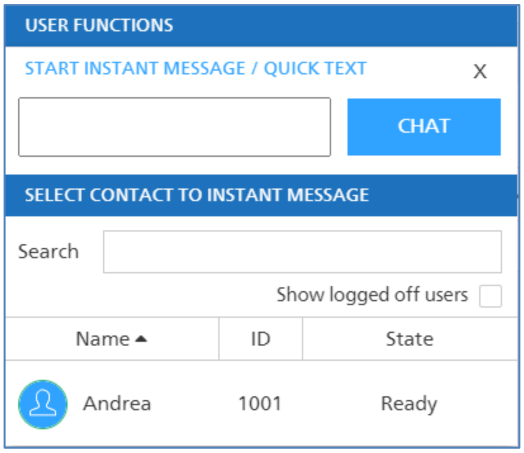

2. Click the Quick Text button in the bottom-center of the drop-down menu.



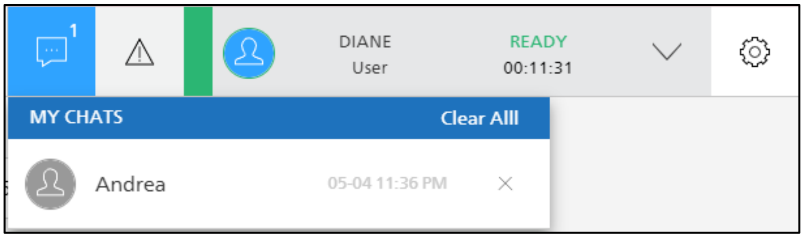

The ‘Quick Text’ dialog box appears.

3. Here, you may enter the User ID to which you wish to send a quick text message.

Alternatively, you can select the user from the list below the dialog box.

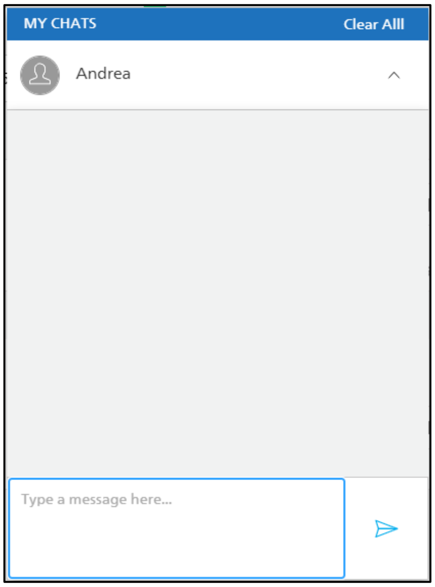



4. Once you have entered the User ID or selected the user from the list, simply click the Chat button to begin a quick text conversation with the user.
   You may also double-click on the user's name to immediately start the conversation.

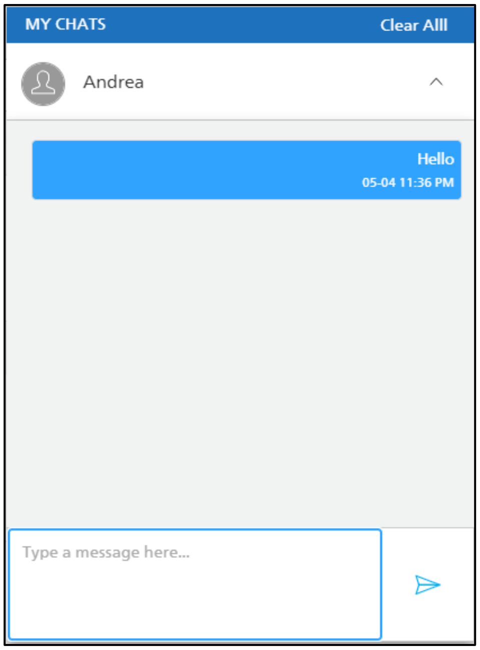



5. The conversation will now show in the Quick Text tab on your iceBar for Web.

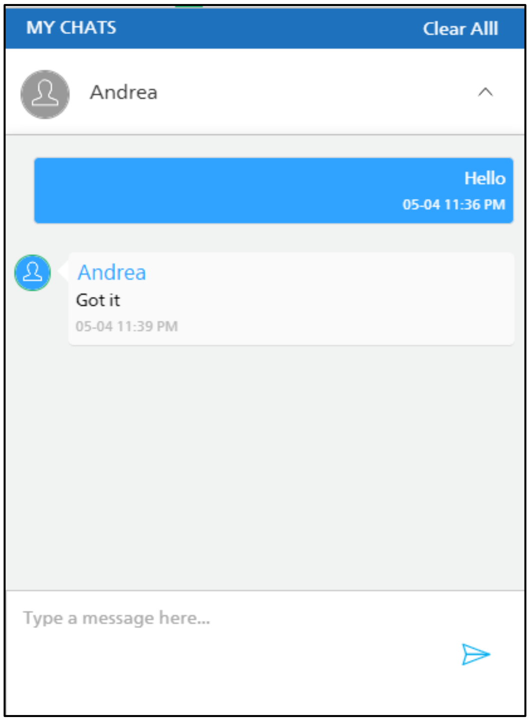
   This tab displays all of your current quick text conversations, as well as the date & time of the last message.
   To open the conversation, click on the name of the user.




6. Here, you may view the most recent message received from the user, and send a new message. To send a message, type it in the dialog box at the bottom, and click the Send button in the bottom right corner.



Once sent, the user receives the message, as shown above. Responses are displayed in a conversation format.




**Note:** Users will receive messages even if they are logged off ice, as long as they are running iceBar or iceBar for Web.

# Silent Monitoring

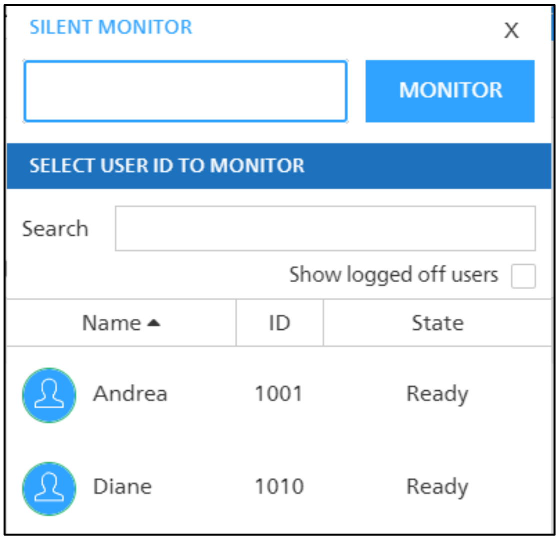
Silent Monitoring allows team leaders, supervisors, and administrators to monitor ongoing interactions on the ice system. The Silent Monitoring Privilege class of service must be enabled for you to have the ability to monitor other users silently. Users without the Silent Monitor Privilege will see a greyed out Silent Monitor button.

To monitor a user:

1. Click the *Silent Monitor* button on iceBar.

   The 'Silent Monitor' dropdown appears.

2. Enter the User ID of the user that you wish to monitor.
   You may click on the User ID in the list below.

   You may double-click on the user's name or click the *Monitor* button. When you are monitoring a user, the *Silent Monitor* button will turn blue.

3. To stop silent monitoring a user, click the *Silent Monitor* button and it will turn white again.

**Note:**

- For more information on configuring users, refer to the *iceAdministrator User Manual*.
- You can only monitor users with a lower user type (e.g., Administrators can monitor Supervisors, Team Leads, or Users, but cannot monitor other Administrators).

- Supervisors must be assigned to the same queue as the user that they wish to monitor, and Team Leaders must be assigned to the same teams as the user that they wish to monitor. Administrators do not have this restriction.
- If you silently monitor a user when your ice telephone line is on hook, ice must first place a call to you. When you pick up your ringing phone, you are connected with the call.
- If you are monitoring a user, the place call button will be disabled.
- Silent monitoring in multi-contact handling works similar to monitoring without MCH in that a supervisor monitors an agent, not a contact. This means that the supervisor will monitor all contacts that the user handles.
- A supervisor must have the MCH class of service enabled to monitor a MCH agent.
- The silent monitor button will be disabled in Wrapup state and enabled on multi IM and Email states

# Coaching and Barge-in


Coaching and Barge-in allow Supervisors to interact with the user during a live interaction. Coaching is the less intrusive of the two because, in the case of a call, the user would hear the Supervisor, but the caller would not. In the case of an IM, the user would see the Supervisor's messages, but the other party would not.

Barge-in is more intrusive because in the case of a call, the user and the caller would hear the Supervisor. In the case of an IM, the user and the customer will both see what the Supervisor types in the text box.

If you have the Silent Monitoring Notification class of service feature enabled for your user profile, the *Coach* button on the iceBar turns red while you are being coached. The Silent Monitoring Privilege feature determines if you have the ability to coach other users. Users without the Silent Monitor Privilege will see a greyed out *Coach* button.

There are two ways to initiate coaching a user:

<u>While Silent Monitoring a user:</u>

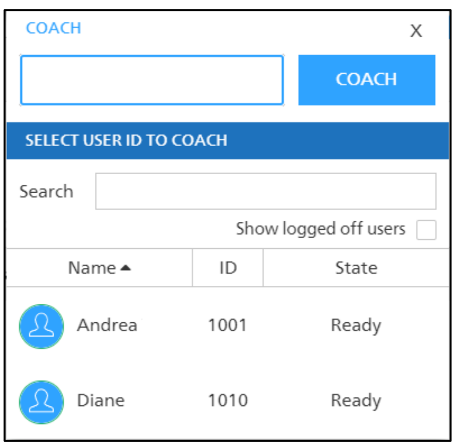
1. Click the *Coach* button on iceBar. Your *Coach* button will turn dark blue, indicating that you are coaching the user.

<u>To Coach a new user:</u>

1. Click the *Coach* button on iceBar.

   The 'Coach' dropdown appears.

   2. Enter the User ID of the user you wish to coach. You may click on the blue arrow to see a list of users and their states.



3. Click on the user to populate their User ID in the Coach field above, then click the *Coach* button. You may also double-click on the user you wish to coach to communicate with them while they are on a contact. Your Coach button will turn blue, indicating that you are coaching a user.

To Stop Coaching a new user:

1. Click the Coach button and the button will turn white. You will then be put into Silent Monitoring state.
2. Click the Silent Monitor button to stop silently monitoring the user.

To barge-in on a conversation you must first be coaching the user:


1. Click the Conference button on iceBar.
2. To undo the conference, click the conference button again and the button will turn white.

**Note:**

- For more information on configuring users, refer to the *iceAdministrator User Manual*.
- You can coach users with a lower user type (e.g., Administrators can coach Supervisors, Team Leads, or Users, but cannot coach other Administrators).
- Supervisors must be assigned to the same queue as the user that they wish to coach, and Team Leads must be assigned to the same teams as the user that they wish to coach. Administrators do not have this restriction.
- If you coach a user when your ice telephone line is on hook, ice must first place a call to you. When you pick up your ringing phone, you are connected with the call.
- The conference button will be disabled after you barge-in.
- The coach button will be disabled in Wrapup state and enabled on multi IM and Email states.

# Multi-Contact Handling

Multi-Contact Handling allows a user to handle more than one contact at the same time. A user can handle email and IM contacts while handling a phone call. This feature includes additional User States, and additional functionality for the handling of multiple contacts using the toolbar, and the Personal Access Queue (PAQ).

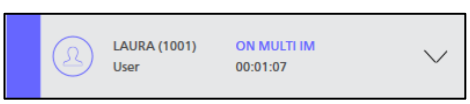
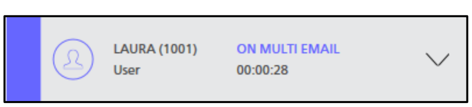
**Note:**

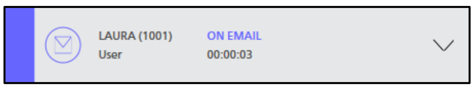
- To use the Multi-Contact Handling feature, the user's profile must have Allow Multi-Contact Handling enabled.
- The number of contacts handled by a user can be limited in the user's profile.
- For more information on configuring a user's profile to handle multiple contacts, please refer to the *iceAdministrator User Manual*.
- Users who have the multi-contact handling COS enabled will not be able to use the Elevate button.

## Multi-Contact User States

Upon accepting a contact, multi-contact handling users will be placed into the following states. These states indicate that they are handling multiple contacts or that they are available to handle multiple contacts.

The following table illustrates the multi-contact states:

| **Multi-Contact User States** | |
|---|---|
| **Sidebar Display** | **Description** |
|   | **On Call:** User is currently handling a call. In this state, the user could be handling multiple IMs and/or Emails as well. |
|   | **On Multi IM:** User is currently handling an IM. In this state, the user could be handling multiple IMs and/or Emails as well. |
|   | **On Multi Email:** User is currently handling an Email. In this state, the user could be handling multiple Emails. |

| Multi-Contact User States | |
|---|---|
| **Sidebar Display** | **Description** |
|   | **On IM:** User is currently handling an IM. In this state, the user could be handling multiple IMs and/or Emails as well. However, this state indicates that the user has chosen to not be alerted for any more voice contacts by moving an IM contact to row 0 in their PAQ. |
|   | **On Email:** User is currently handling an Email. In this state, the user could be handling multiple IMs and/or Emails as well. However, this state indicates that the user has chosen to not be alerted for any more voice contacts by moving an Email contact to row 0 in their PAQ. |

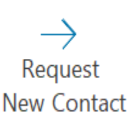
## Handling Multiple Contacts

If a user is handling a contact and is also configured to handle multiple contacts, the user will automatically be alerted for another contact that is waiting in the queue. The user does not need to change their state back to Ready to accept the next queued contact.

For more information on answering incoming contacts, refer to the Receiving a Call, Receiving an Email, and Receiving an IM sections of this manual.

**Note**: If you are using icePhone and handling multiple chats, each chat will open a separate chat window.

Request New Contact:




If a user is configured to handle multiple contacts and would like to manually request another contact rather than being automatically alerted, they can do so by clicking the *Request New Contact* button. To be able to use the *Request New Contact* button, the user's profile must have both Request to Select Next Contact and Allow Multi-Contact Handling enabled.

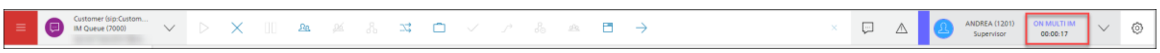
When these two settings are enabled, while a user is handling a contact, the user will not automatically be alerted for additional contacts. The user must click the *Request New Contact* button on their iceBar in order to be alerted for another contact.

For example, if a user is handling a voice call, the user will not automatically be alerted to any other contacts even though they are configured for multi-contact handling. The user must select the *Request New Contact* button on their iceBar to be alerted for another contact to handle at the same time.

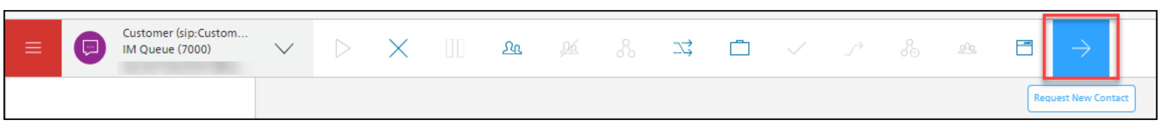
**Note:**

- The Request to select next contact COS must be enabled in iceAdministrator for the user to be able to use the button. For more information, refer to the iceAdministrator User Manual.
- The *Request New Contact* button will need to be added to the iceBar for Web. For more information on adding the button to the iceBar for Web, refer to the iceManager User Manual.

Follow the steps below to use the *Request* New Contact button when you are handling a contact:



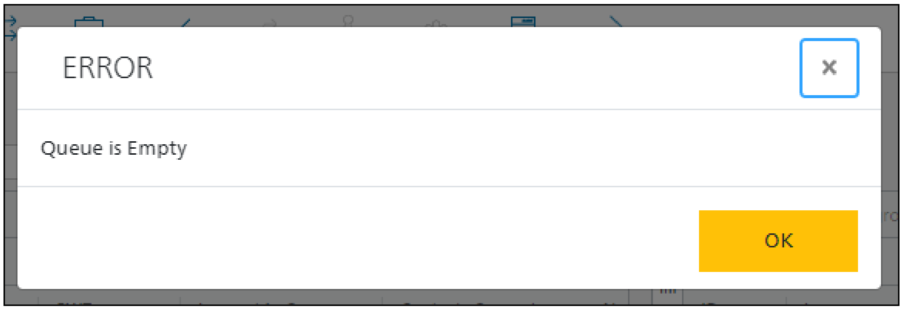
1. When you are ready to handle another contact at the same time, select the *Request New Contact* button on your iceBar.




2. You will be alerted for the next available contact.

3. Accept the contact. Your Contact Details Panel will update to reflect the number of contacts you are currently handling.

You may select the *Request New Contact* button to receive additional contacts until you reach the maximum number of contacts specified in your profile. If there are no contacts waiting in your assigned queues, you will see the following error message when you select the button:




**Note**: When you reach the maximum number of contacts configured for your profile, the *Request New Contact* button will be disabled. This button will also be disabled if your status is Not Ready, Pending Not Ready, Pending Log off or Silent Monitoring.

Using the Toolbar to Handle Multiple Contacts:

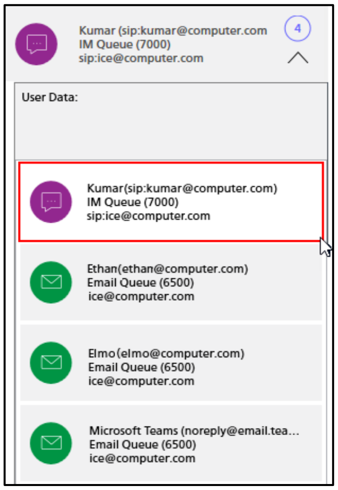
When a user is handling multiple contacts simultaneously, the toolbar can only be focused on a single contact. This means the buttons can only be used on one of the contacts currently being handled by the user. The buttons on the toolbar will be used on the contact that the toolbar is currently focused on.

To identify the contact on which the toolbar is currently focused, look at the contact information displayed in the Contact Details Panel:

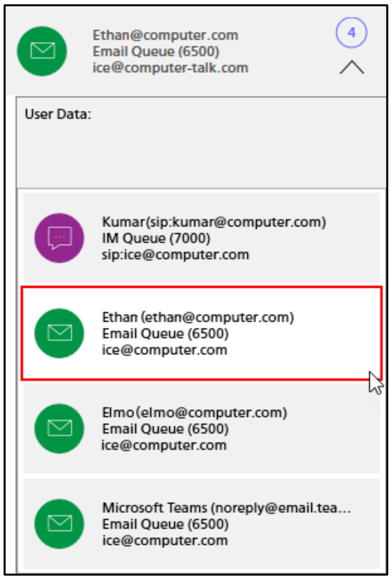

The number displayed in the top-right corner of the Contact Details Panel, as shown below, identifies the number of contacts the user is currently handling.

Follow the instructions below to change the toolbar's focus to another contact:

1. Select the Contact Details Panel to display the list of contacts currently being handled.

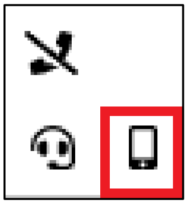



2. Select another contact in the list to change the toolbar's focus. Notice that the information displayed in the Contact Details panel switches to reflect the new contact that the toolbar is focused on.




If you are using the icePhone, switching the focus contact will open the icePhone for that contact on your iceManager page.

Clicking on the icePhone button on the iceBar for Web will also open the focus contact:



For example, if you are focused on a chat contact, clicking the icePhone button will pop up the chat window on your iceManager page.

If you are focused on a voice contact, clicking the icePhone button will open the icePhone for the voice contact.

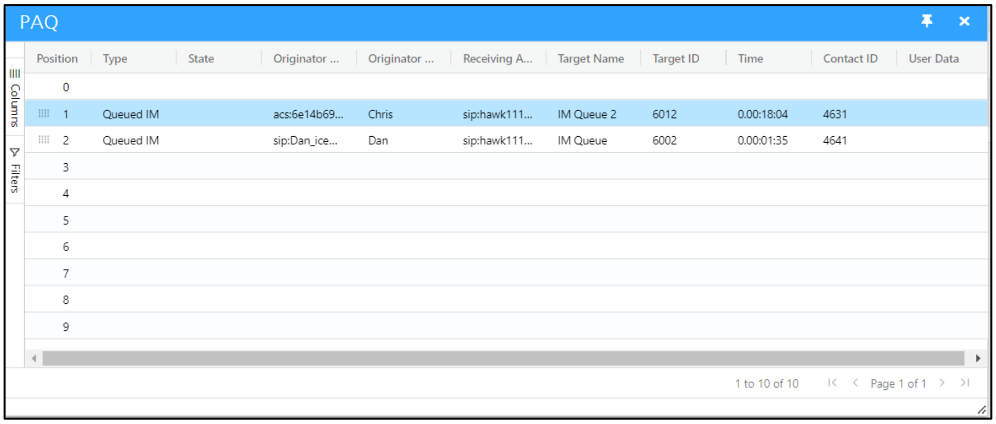
**Note:**

- The *Consult* button will be disabled for a multi-contact handling user while the user is consulting on an IM contact.
- Closing the chat window does not end the chat. If you close the chat window during your chat, you can reopen the window at any time by clicking on the icePhone button.
- If the other chat participant sends you a message while your chat window is closed, the chat window will pop open on your screen to show the new message and your conversation history.

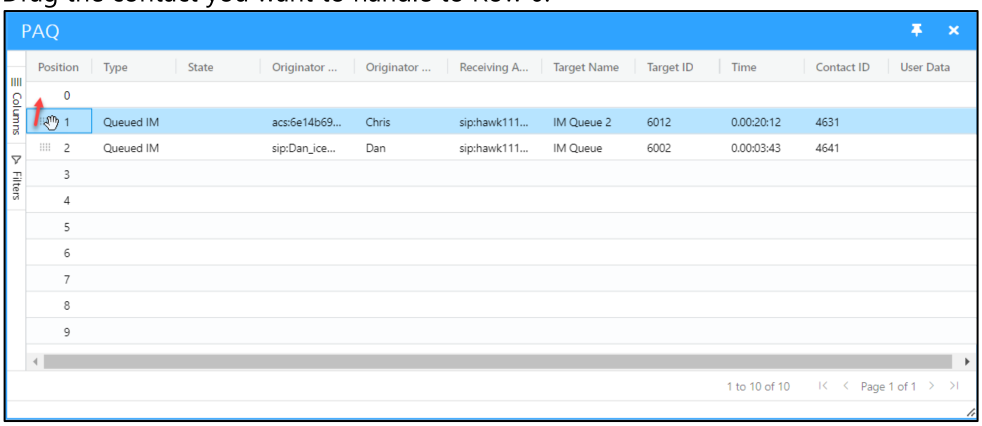
## Managing Multiple Contacts using the PAQ

When a user is handling multiple contacts simultaneously, the PAQ can be used to manage the contacts and the number of contacts being handled.

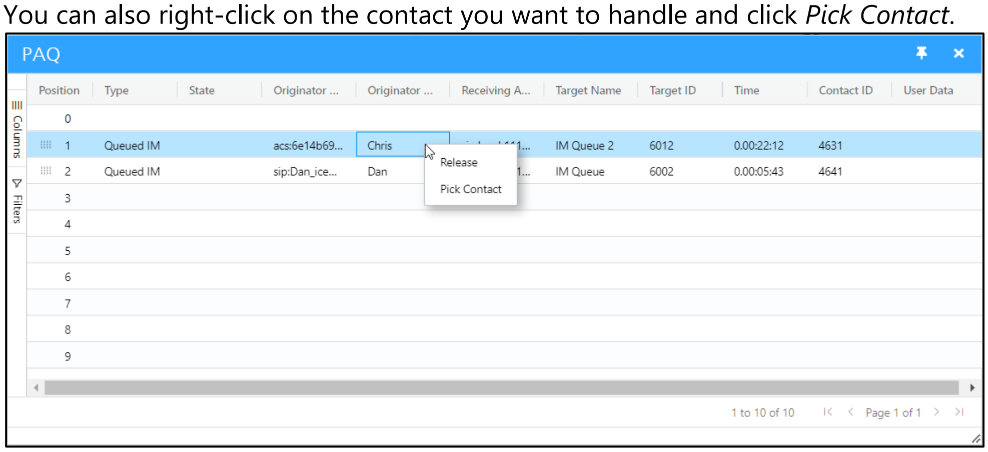
To change the toolbar's focus to another contact, select the row with the contact you want to change the focus to.




Drag the contact you want to handle to Row 0.

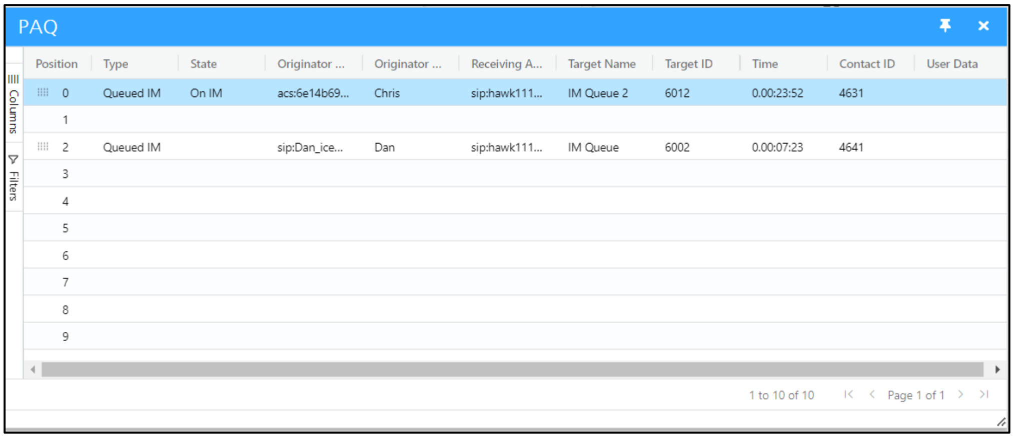



You can also right-click on the contact you want to handle and click *Pick Contact*.




Row 0 within the PAQ can be used to stop the system from alerting you for queued voice contacts.

To stop the system from alerting you for more queued contacts, drag and drop one of the contacts from another row into Row 0:




For more information on the PAQ, please refer to the iceBar User Manual.

# Appendix A: Global Settings

Many features of iceBar for Web are controlled by global settings on the ice server. These features are configured during the implementation of ice to meet your contact center's needs. After installation, changes can be made to the global settings by certified technicians.

# Global Settings that affect iceBar for Web

## Not Ready Reasons

By default, Not Ready Reasons are displayed when the user toggles from the Ready to the Not Ready state, as described on page 56.

Not Ready Reasons can be customized in the iceManager settings. The default reasons can be deleted or modified (i.e., the name of the buttons that appear in the tooltip can be modified), and new reasons can be added. In addition, the icons can be modified or deleted altogether, leaving only text labels as the Not Ready Reasons.

Not Ready Reasons can be disabled if they are not required. This will allow users to toggle between the Ready and Not Ready states without selecting a reason.

**Note:** Once a Not Ready Reason has been added or modified, you will have to restart iceBar for Web to see the changes.

For more information, refer to the *iceManager User Manual*.

## Line of Business Codes

By default, two Line of Business (LOB) codes are displayed when the user clicks the *LOB* button, as described on page 90.

LOB codes can be customized in the iceManager settings. The default codes can be deleted or modified (i.e., the names of the codes can be modified) and new codes can be added.

**Note:** Once a LOB code has been added or modified, you will have to restart iceBar for Web for the changes to appear.

For more information on how to configure the line of business codes, refer to the *iceManager User Manual*.

## Forced Line of Business Codes

By default, LOB codes are optional. The user may decide not to tag a call with a LOB code.

The settings in iceManager settings can be configured so that LOB codes are forced. With this setting, the user must select a LOB code before he or she can take another call. The settings can also be configured so that multiple LOB codes must be selected for each call.

## Log on to all Queues Only

By default, users can log on to all assigned queues or select an individual queue to which they are assigned.

The settings in iceManager settings can be configured so that users are not presented with the option to select a queue. Instead, they are logged on to all queues to which they are assigned upon clicking the *Logon* button.

For more information on how to configure log on queue selection, refer to the *iceManager User Manual*.

## Canned Responses

The canned responses can be configured in iceManager settings.

For more information on how to configure the canned responses, refer to the *iceManager User Manual*.

# Appendix B: Microsoft Teams

If your contact center is using iceBar for Web in conjunction with Microsoft Teams, users have some additional options for call handling.

## Call Handling

Upon receiving Microsoft Teams' Toast Window notification, you have the ability to answer or reject the call.


You can then proceed with using the Microsoft Teams phone control options, or you can use iceBar for Web for call handling.

## Microsoft Teams Presence Synchronization

Bidirectional presence mappings are created between Microsoft Teams and ice user states. The text displayed in the Microsoft Teams presence status can be customized. Presence state mappings are defined in an XML configuration file. For more details, see the ice PresenceSync implementation guide.

Sample configurations:

| ice to Microsoft Teams Mappings | |
|---|---|
| **ice** | **Microsoft Teams Status** |
| Ready | Available |
| Not Ready | Not Ready |
| Wrapup | Wrapup |
| Alerting | On-the-phone |
| Placing Call | On-the-phone |
| Initiating Call | On-the-phone |
| On Call | On-the-phone |
| Consulting | In-a-conference |
| Conferencing | In-a-conference |
| Monitoring | On-the-phone |
| On Email | On a queued email [Queue name] |
| On IM | On a queued IM [Queue name] |

| Microsoft Teams to ice Mappings | |
|---|---|
| **Microsoft Teams Availability** | **ice Presence State** |
| None | Ready |
| Online | Ready |
| Idle | Not Ready |
| Busy | Not Ready |
| Idle Busy | Not Ready |
| Do Not Disturb | Not Ready |
| Be Right Back | Not Ready |
| Away | Not Ready |
| Offline | Not Ready |

# Index