iceBar for Desktop

User Manual

Server Version 14.x

Part Number: UM_ICB_14.x_20240815
iceBar versions 14.x

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Welcome to iceBar

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), web chats, Short Message Service (SMS), social media postings and messages, video calls, etc.). **iceBar** is the perfect tool to help you handle contacts received through ice.

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

- **Getting Started**: major concepts, the logon procedure, the logoff procedure, common error messages, and the major components of iceBar.
- **iceBar Options**: use and configure iceBar, allowing you to log on and handle contacts, as well as view important information about contacts received and queued.
- **Contact History**: view information about recently handled or missed contacts.
- **Personal Access Queue**: view information about the current contact, as well as contacts that are queued for handling.
- **Queue Statistics:** view real-time information about the queues in your contact center.
- **Handling Contacts**: use contact handling features, such as receiving or responding to an email, and answering or placing a call.
- **iceCampaign**: contact prospects that are part of an existing outbound calling campaign.

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

Note:

- iceChat, email, and recordings are premium features of ice. The setup of these features is not addressed in this manual. For information, refer to the iceChat User Manual, and iceManager User Manual.
- Social media posts are handled as email messages, and social media messages are handled as IMs.
- Many features of iceBar are customizable by the **ice Administrator** (the person in your office responsible for designing/maintaining ice). The ice Administrator has chosen the features of iceBar that are accessible in your contact center. This manual contains information on all features of iceBar. Your configuration may differ from those demonstrated in the manual. Therefore, some features discussed in this manual may not be available on your configuration of iceBar.

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, as you may want to reference how iceBar is reflected in these products;
- 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 and understand some important iceBar concepts.

The sections that follow describe the components of iceBar, important terms and concepts, logon and logoff procedures, and resolutions to the most common error messages.

Once familiar with the interface of iceBar, you may refer directly to Chapter 7: Handling Contacts, for detailed information on how the iceBar is used to manage contacts. If required, you can review Chapters 2 through 7 for more information on the components of iceBar.

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

Components of iceBar

This table provides a brief description of iceBar components. For more information on each component, refer to the corresponding page(s).

Component	Description	Page
iceBar Toolbar	The **iceBar** toolbar is used to connect to ice, handle contacts, and view queue statistics. It displays information about the user's state and allows for quick access to buttons. Contact History and the PAQ Window are also accessible through the iceBar toolbar. 	38
System Tray Icon	The **System Tray icon** () provides access to additional buttons that are not displayed on the iceBar toolbar. The system tray icon also provides user state information.	70
Contact History	The **Contact History** window stores information about recently handled or missed contacts. This can include clients you have called, contacts received from a queue, or other contacts received through iceBar.	123
PAQ Window	The **Personal Access Queue (PAQ)** is a holding place for your direct contacts: those you are currently handling and those that are waiting for you. The **PAQ Window** is the component of iceBar that displays the activity in your PAQ (i.e., contacts and their status). Using PAQ Window, you may Pick contacts that are waiting in your PAQ, and you may also Park calls into your PAQ.	134
Queue Statistics	The **Queue Statistics** window contains real-time information for the queues in your contact center. This window includes information on the number of contacts handled, the number of contacts abandoned, the number of contacts currently waiting in the queue, and the duration of the current longest wait time a queued contact is experiencing.	155

Key Concepts

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

Remote Users and No Telephone Users

A remote user is an iceBar 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 Montréal. Remote users include Teams users. A remote user has a network connection to ice through the iceBar application. When the remote user logs on to iceBar, 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.

A no telephone user is an iceBar user who does not have an associated telephone set. This type of user is generally one who is dedicated to handling contacts other than telephone calls, such as emails, instant messages, SMS messages, or social media content.

iceBar Email Users

Email users are users set up to receive email and social media post contacts. They must have a valid email address and the 'Can Handle Email Contacts from ice' property enabled for their user profile in iceAdministrator.

IM Users

IM users are users set up to receive instant messages, web chat, social media messages, and SMS contacts through ice. They must have a valid IM address, and the 'Can Handle IM Contacts from ice' property enabled for their user profile in iceAdministrator. For more information, refer to the iceAdministrator User Manual.

On Hook vs. Off Hook

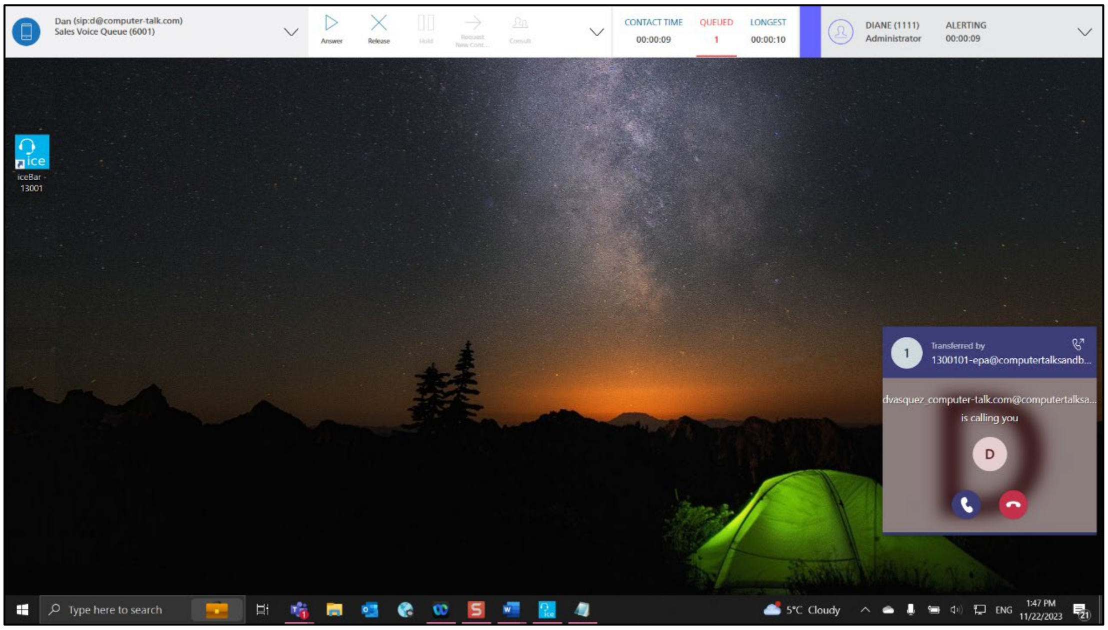
Consider a traditional telephone set with a handset and base.

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 call that ice initiates when the user is alerting for or placing a call.

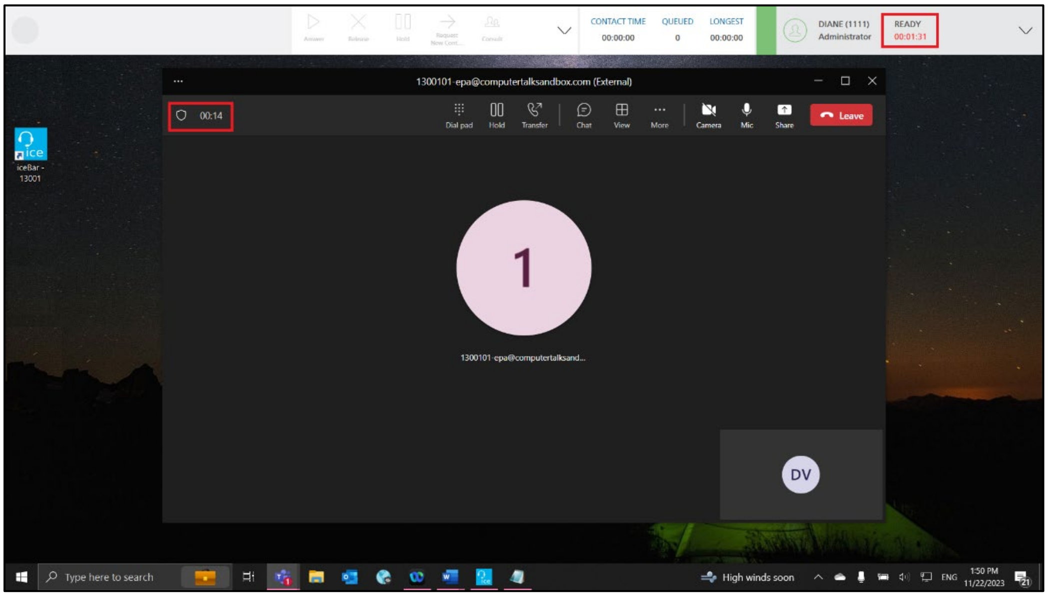


Once this connection is established, the user is **off hook**.

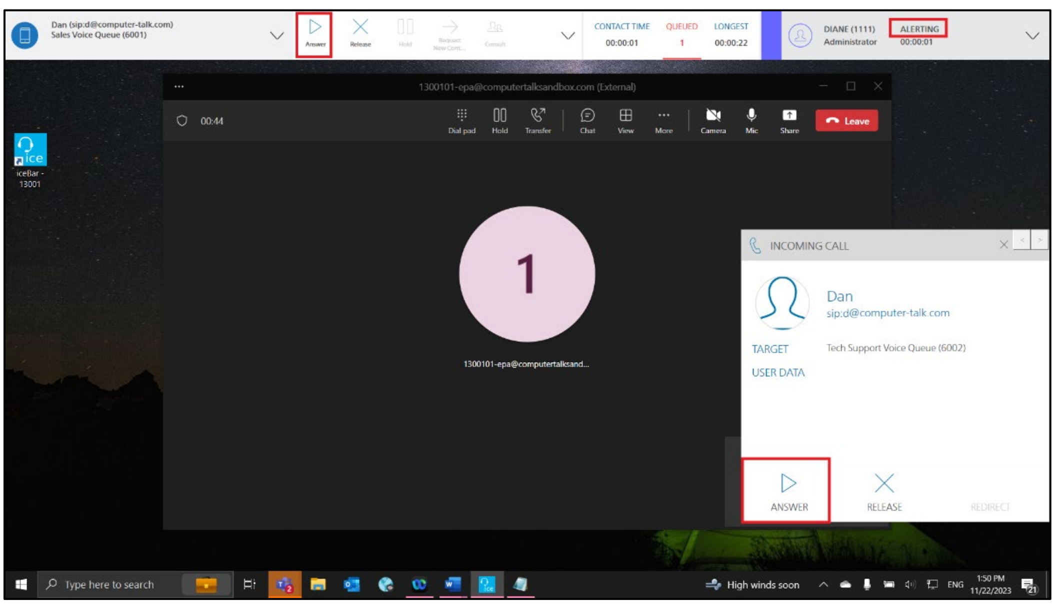
If a call or email is presented to the user when the phone is **off hook**, a beep sounds in the user's handset or headset.

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

The concept of a queued contact vs. a direct contact is particularly important for contact centers that wish to use the Personal Access Queue (PAQ). For information on the PAQ Window, refer to Personal Access Queue .

A **queued contact** is one that originates from a queue in ice. Users receive a contact from the queue based on the amount of time 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.

When a user is handling a contact or in the Not Ready state, direct contacts can wait in the user’s PAQ, which is a holding place for direct contacts. A user does not enter the Wrapup state after handling a direct contact.

A **transferred queued contact** is one that originated in a queue, was answered by User A, and is then 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 Wrapup state when the contact is completed. For more information on the Wrapup feature, refer to the iceAdministrator User Manual.
- Unlike a contact coming directly from the queue, a transferred queued contact can enter a User’s PAQ. For example, if User B is handling a contact or in the Not Ready state when User A transfers the queued contact to User B, then the contact waits in User B’s PAQ.

Launching iceBar

There are two ways to launch iceBar, depending on your contact center's configured options:

- Start up your workstation

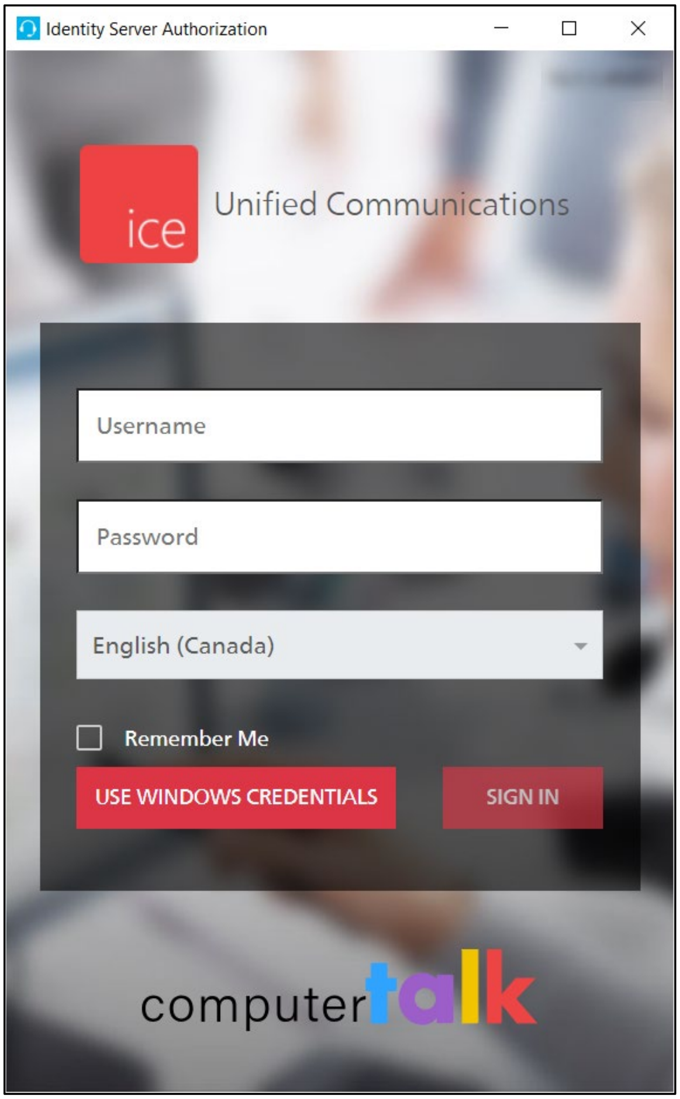
    OR

- Double-click the iceBar desktop icon

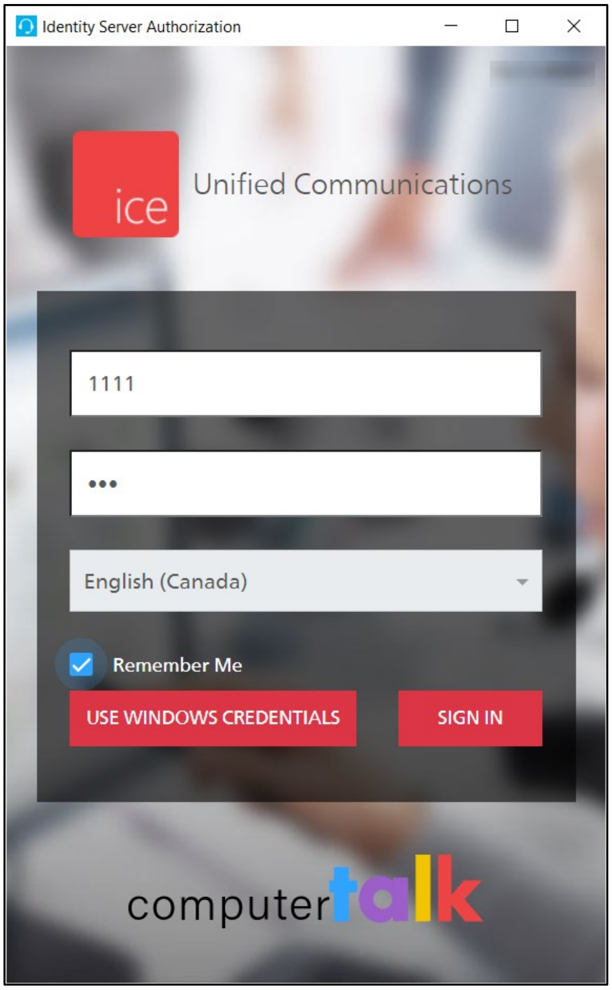
Once you launch iceBar, the application will load.

Identity Server Authorization

After you launch iceBar, the Identity Server Authorization window will open:


Identity Server Authorization
ice
Unified Communications
Username
Password
English (Canada)
Remember Me
USE WINDOWS CREDENTIALS
SIGN IN
computertalk

The Identity Server Authorization window will prompt you to enter your User ID and Password.



You can enable the Remember Me checkbox to save your User ID.

Click the Use Windows Credentials button if you have Single Sign-On enabled. You may be prompted to enter your Windows Credentials.

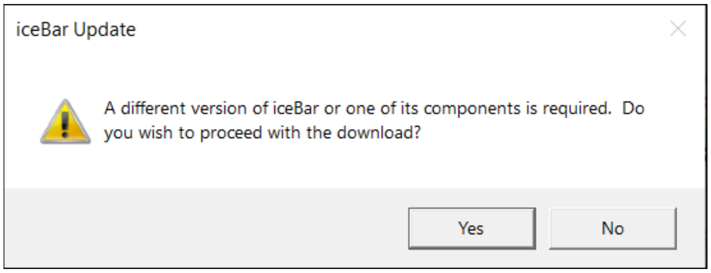
Otherwise, click the Sign In button to proceed.

The toolbar will load with your profile settings at the top of your screen.

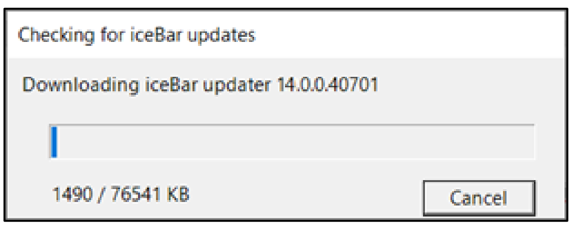
Note: You will be required to enter your password each time you login for security purposes.

Updating iceBar

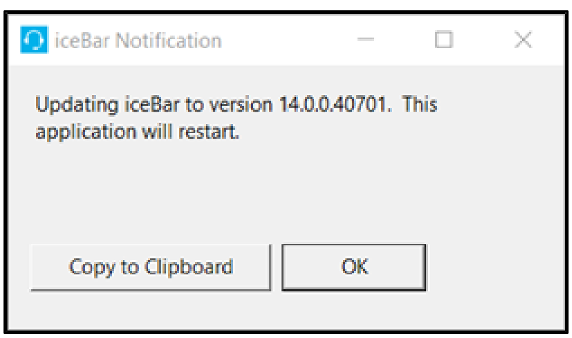
If iceBar has determined that the version on your workstation requires updating, you will see the following window asking if you wish to proceed with the update:



Click Yes to continue with the update. The following window will display, indicating that it is downloading the correct version:



The window shows the version that is downloading. Once the updating version of iceBar has been downloaded, a window appears indicating that iceBar will now restart:



Click OK to install the updated version of iceBar on your workstation.

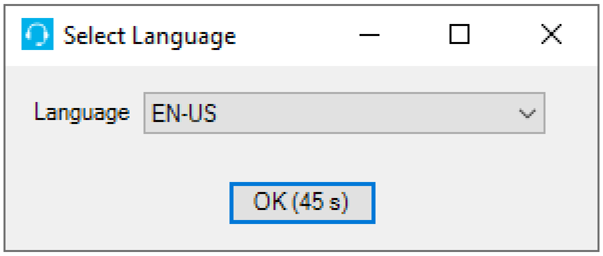
When the installation is complete, iceBar will restart normally.

If you would not like to update your iceBar at this time, you can click No to cancel the update. IceBar will start normally.

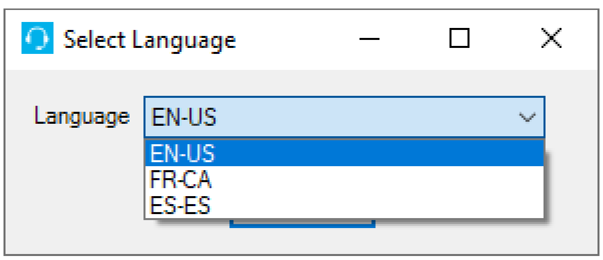
Note: You can skip iceBar updates up to 3 times.

Selecting a Language

If your contact center has been configured for multiple languages, the iceBar language selection window will appear when you launch iceBar.



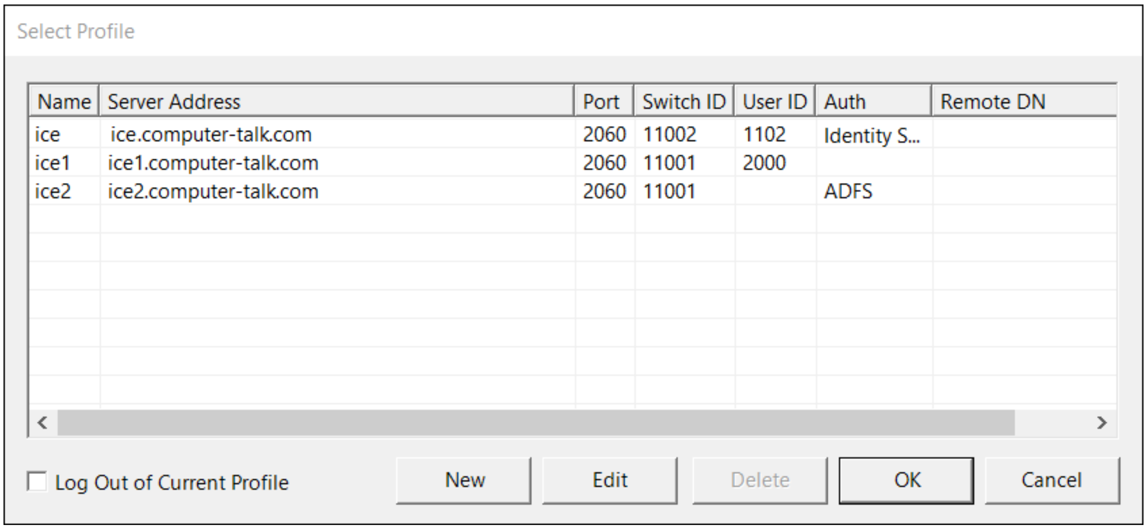
This contact center is configured for multiple languages. Select the one that you require.



Selecting a Profile

If your contact center has been configured so that users have multiple profiles, you will be prompted to select an iceBar **Profile** when you launch the application.

The section that follows describes how to select a profile.



Multiple profiles allow the user to easily sign on when they work from multiple locations (e.g., office, home, hotel, public internet site, etc.). It is also useful for those who may be required to log onto multiple ice servers or use different user IDs, or workstations during their shift.

<u>To select a profile:</u>

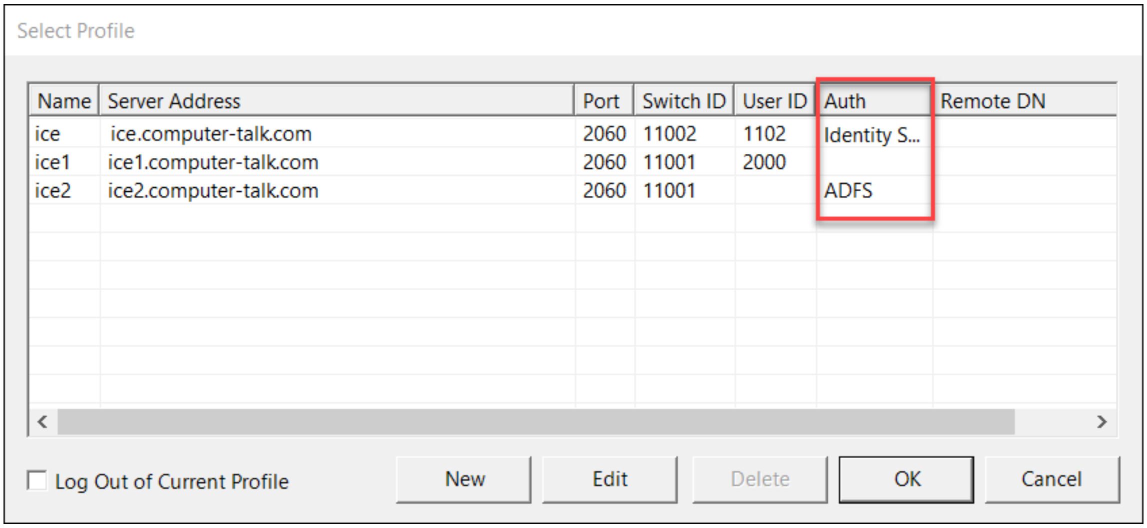
1. Select the profile that you wish to use by single-clicking/highlighting it.
2. Click *OK*.

Note: If you do not select a specific profile, your default profile will be selected automatically after a configurable amount of time (default is 60 seconds). Your default profile is the one you last used.

For more information on profiles, including how to edit existing profiles, create new profiles, switch profiles, and configure the amount of time before a profile is automatically selected, refer to page 111.

Single Sign-On

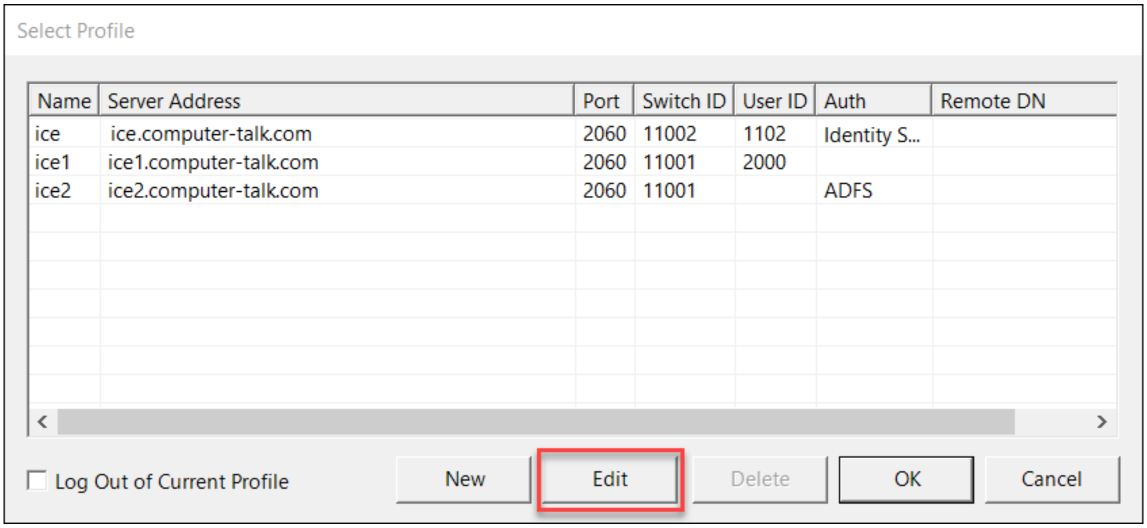
If your organization has enabled Single Sign-On for your iceBar deployment, you will be able to sign on using one of the identity management platforms, including ADFS (Active Directory Federation Services) or Okta. If Single Sign-On is enabled for you, you will see an entry in the Auth (Authentication) column under profiles:



If there is an entry in the Auth column for the profile you wish to sign onto, you can skip to the Signing On with Single Sign-On section.

Enabling Single Sign-On

If you know that Single Sign-On is configured, but the Auth column is empty, select the profile you wish to use and click the *Edit* button:

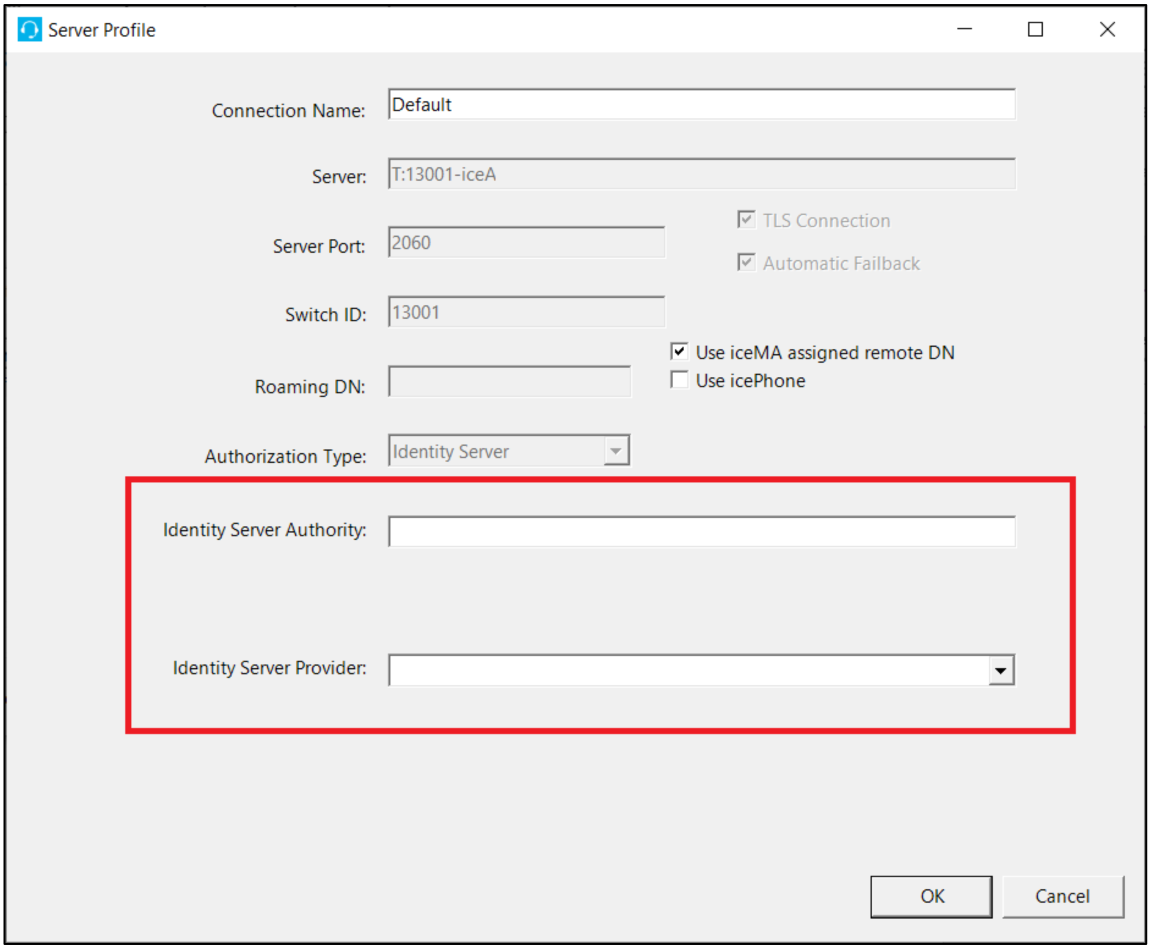


The Server Profile dialog box will appear. In order to activate Single Sign-On for the profile, click the Authorization Type drop-down menu and select *Identity Server*. Four fields will appear at the bottom of the window.

Note: If you do not see *Identity Server* in the Authorization Type drop-down menu, it is because the server version is older than ice 9.0. Select ADFS from the drop-down menu and ensure that all fields that appear below are filled out.

Ensure that the Identity Server Authority and the Identity Server Client Verifier fields are filled out. Then select the appropriate Identity Server Provider from the drop-down menu. ADFS users will select ADFS and Okta users will select Okta.

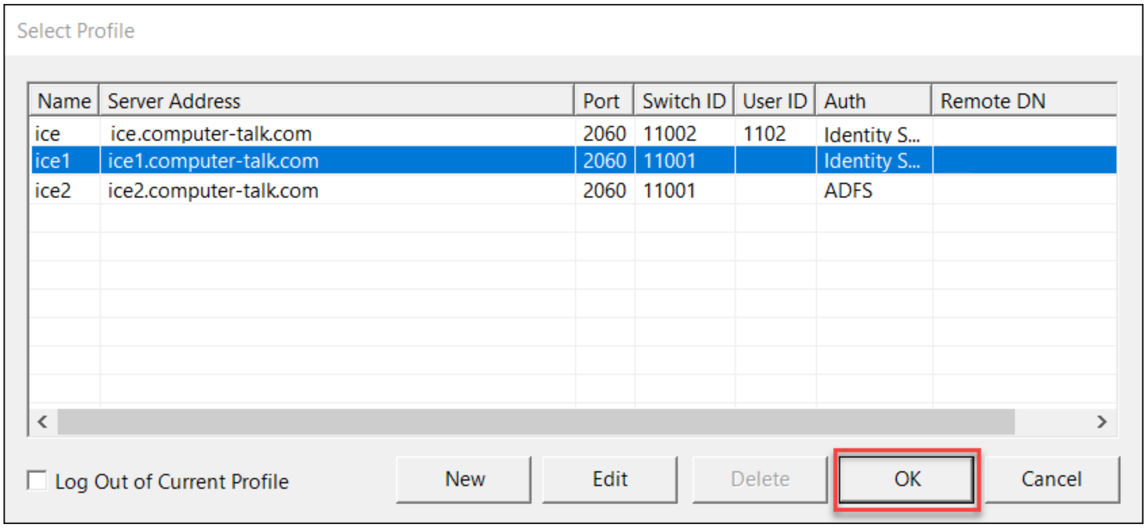
Note: If any of the text boxes are empty, check with your administrator to get the correct information for these boxes.



Once Single Sign-On is properly configured, you can sign on to your iceBar profile.

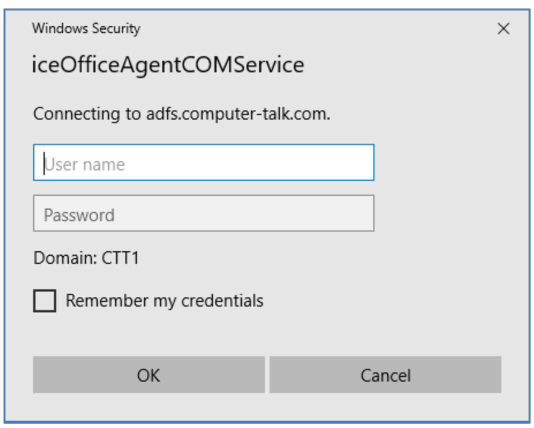
Signing On with Single Sign-On

Once Single Sign-On is properly configured, select your desired profile from the list and click *OK*.



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

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



ADFS users will use their Windows credentials to log in, which are the same credentials that you use to log on to your computer or your company email. Enter your username and password in the boxes.

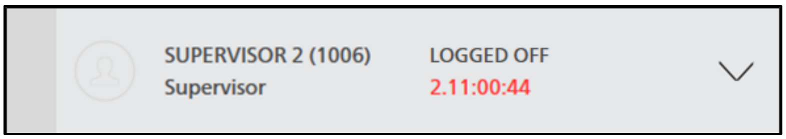
Okta users will be redirected to the Okta sign-in page and use their Okta credentials to log in.

Logon Procedures

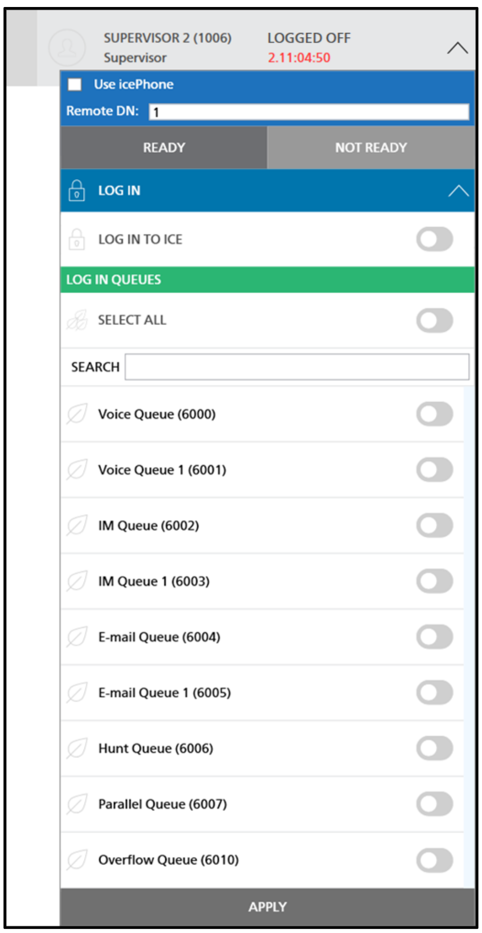
Users have the option to logon to ice and queues, or to log on to ice only.

To log on to ice and queues:

1. Click on the drop-down in the User Panel



Click *Log In*. The following drop-down menu appears, showing all queues you have access to.



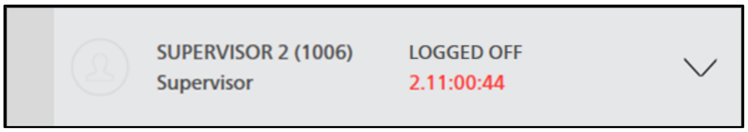
Note: To use the icePhone to handle contacts, the “Use icePhone” checkbox must be enabled before logging in.

2. Use the toggle switch for *LOG IN TO ICE*. An active switch is shown as .

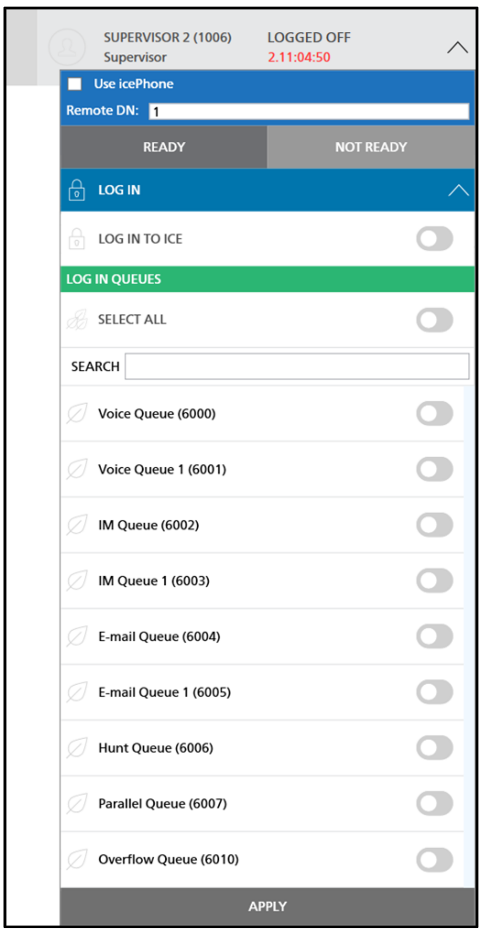
3. Under the LOG IN QUEUES section, use the toggle switches to select the queues you want to log into. You can use the toggle for *SELECT ALL* to log into all available queues.
4. Click *APPLY*. The drop-down menu will disappear, and ice will log you onto ice.

To log on to ice only:

1. Click on the drop-down arrow in the User Panel



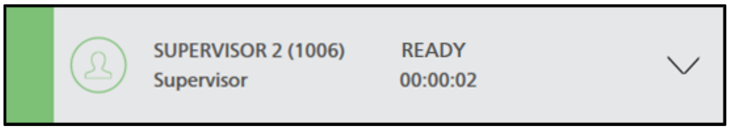
Click *Log In*. The following drop-down menu appears, showing all queues you have access to.



2. Use the toggle switch for *LOG IN TO ICE*. An active switch is shown as .

3. Click *APPLY*. The drop-down menu will disappear and ice will log you onto ice.

   Your status bar will now be in color.



Note:

- If 'Password Callback' is enabled in your user profile, you will receive a call from ice upon logon. Answer the call and enter your password on the keypad of the telephone set, followed by the # key. If you have entered the correct password, you will hear two beeps from ice to indicate you have successfully logged on. For information on configuring users, refer to the iceAdministrator User Manual.
- iceBar can handle multiple users on a single workstation if each user has a separate Windows account.
- Users can change their own password. For more information, refer to page 120.
- If required, a user's password can be reset in iceAdministrator. For more information, refer to the iceAdministrator User Manual.
- Users can also use the *Logon* button in the User or Buttons panel to initiate the logon process. This is only available if the *Logon* button is added to the User or Buttons panel.
- The queue logon options are configurable, including *Force Logon All Queues* and *Show Queue Picker*. These settings will also be reflected in iceMonitor. For more information, refer to the iceManager User Manual.

Logoff and Exit Procedures

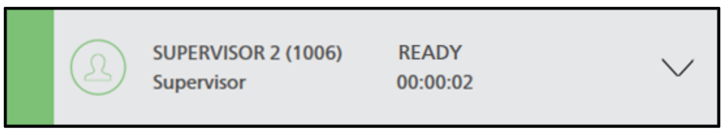
Users should always follow logoff procedures at the end of their shift. Failure to do so could result in skewed statistics, calls being connected to unattended telephone sets or error messages for users attempting to log on during the subsequent shift.

Note: You can log off from selected queues or selected profiles without exiting from iceBar.

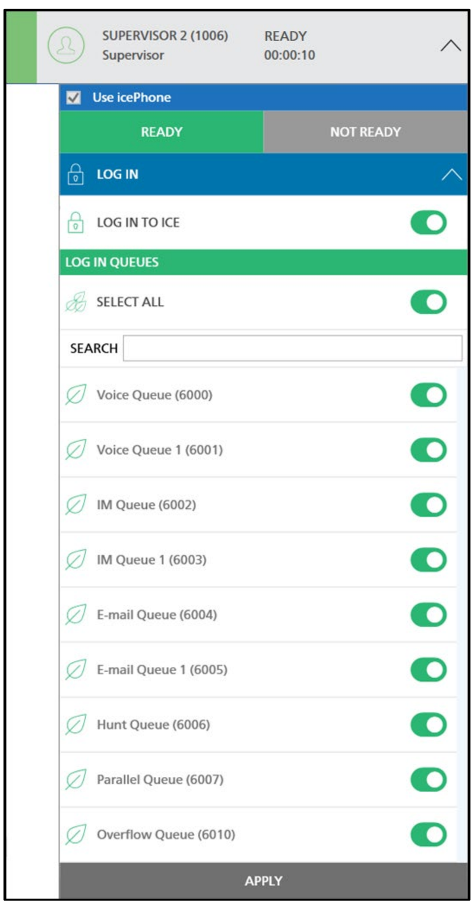
Users have the option to logoff of queues and ice or queues only.

To logoff of queues and ice:

1. Click on the drop-down arrow in the User Panel

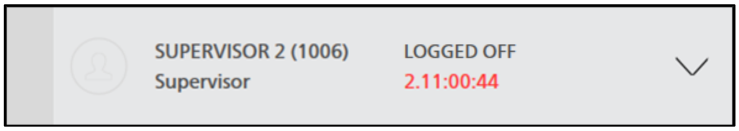


2. Click on *Log In*. The following drop-down appears, showing all queues you have access to.



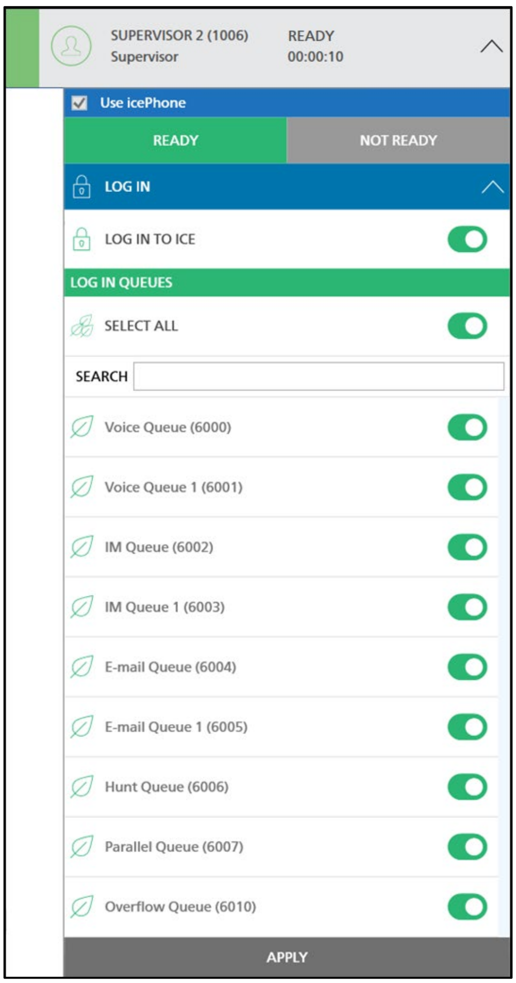
3. Toggle off *LOG IN TO ICE*. This will toggle off all available queues and off of ice.
4. Click *APPLY*. The drop-down menu will disappear and ice will log you onto all of the selected queues.

   Your status bar will now be greyed out if you are not logged on to ice.



<u>To logoff queues only:</u>

1. Click on the drop-down arrow next to your Name, Role, and Status Bar.
2. Click on *Log* In. The following drop-down appears, showing all queues you have access to.

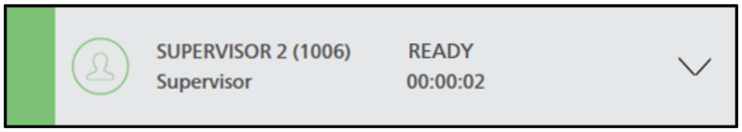


3. Select the specific queue to toggle off.

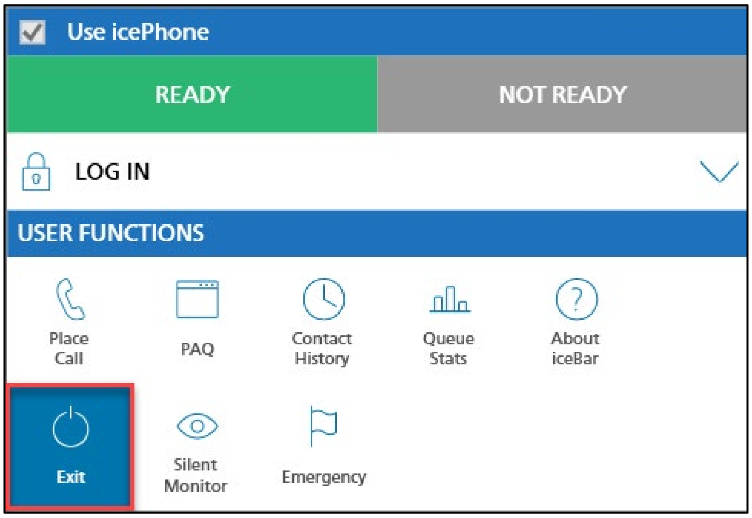
4. Click *APPLY*. The drop-down menu will disappear and ice will log you off all of the selected queues.

To Exit:

1. Click on the drop-down arrow in the User Panel.

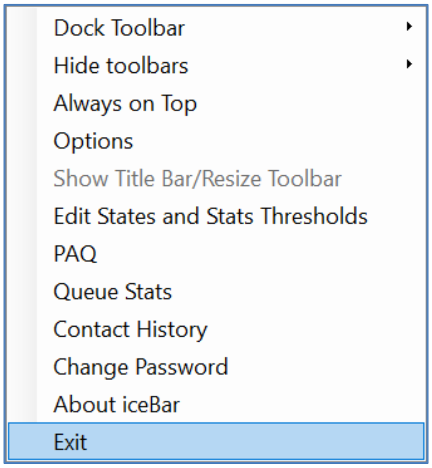


2. Click on the *Exit* button to close iceBar.



Alternatively, to Exit:

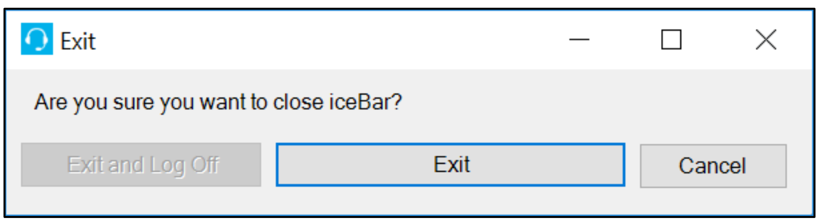
1. Right-click anywhere on the iceBar to see the following options.



2. Select *Exit*.

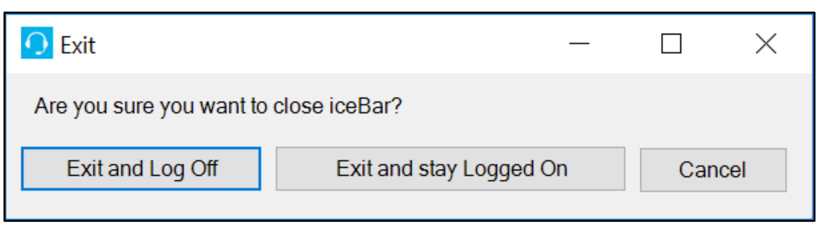
   The iceBar application closes.

   Your ice configuration may include an alternate Exit window:



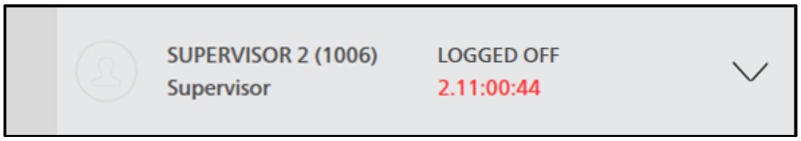
Selecting *Exit* closes iceBar. Selecting *Cancel* keeps the iceBar open.

If you have not logged off of your queues before attempting to exit, you will see the following pop-up.



You may select *Exit and Log Off*, which will allow you to exit safely from iceBar, or you may choose to *Exit and stay Logged On*, which will allow you to close the application but remain logged on to the server and queues.

It is strongly recommended that you ensure that your state says Logged Off before exiting iceBar. If you *Exit and stay Logged On*, then only the iceBar application closes. 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.



Another alternative to Exit:

1. In your system tray, right-click on the iceBar icon.
2. Click *Exit*.

Note:

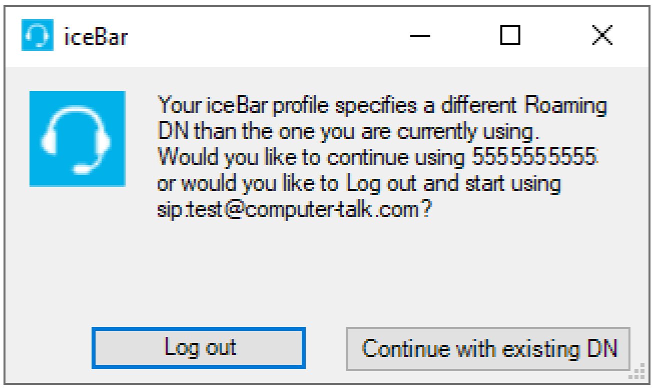
- Upon successful log off, ice plays a single tone, which is heard only when your ice telephone line is off hook.
- By default, the 'Log Off of Queues' dialog box has the 'Log Off of ice' checkbox selected. This option allows you to log off from all queues to which you are currently logged on. Alternatively, the list allows you to select one or more queues to which you are currently logged on. If you are not logged on to any queues (because you have no queue assignments), the only option is 'Log Off of ice'.
- Users can also use the *Logoff* button in the User or Buttons panel to initiate the logoff process. This is only available if the *Logoff* button is added to the User or Buttons panel.

Common Error and Warning Messages

The sections that follow describe some common error messages that may appear.

iceBar Logged in Elsewhere

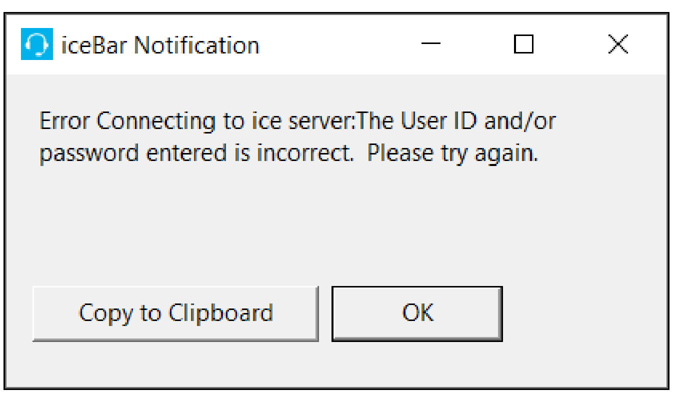
If a user is currently logged on at another phone, the following message appears:



A user can run iceBar on multiple workstations, but not multiple phones. To resolve the problem, use iceMonitor to log off the user. The user should then be able to log on elsewhere. For more information, refer to the iceMonitor User Manual.

Authentication Error

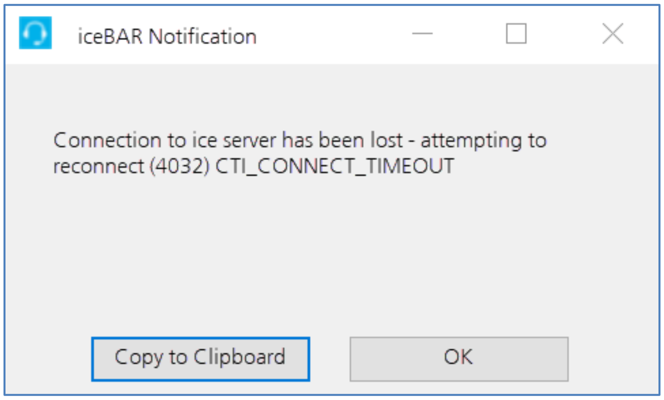
If a user types the wrong User ID, or if a user has entered the wrong password, the following message appears:



To resolve this problem, an ice Administrator can reset a user's password or verify a User ID in iceAdministrator. For more information, refer to the iceAdministrator User Manual.

Connectivity Error

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



You will notice that the system tray icon also changes to reflect that iceBar is not connected to the ice server:

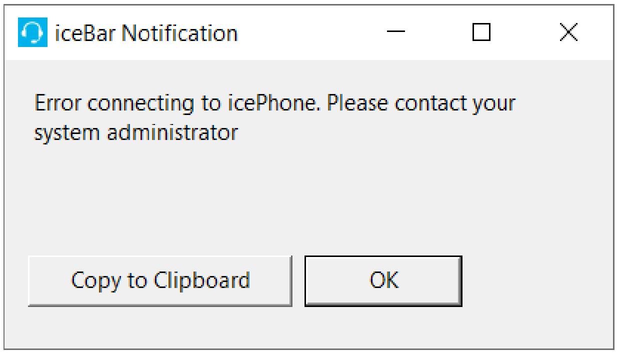
Disconnected iceBar: 

Connected iceBar: 

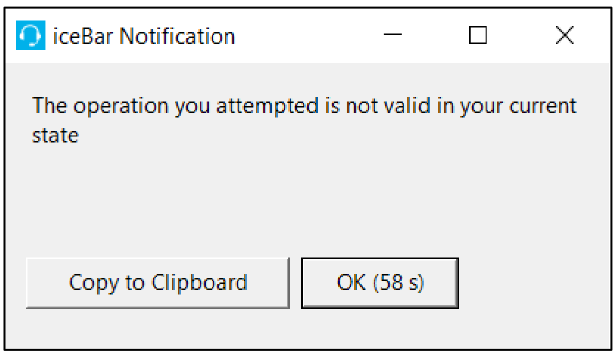
iceBar will keep attempting to reconnect until it is reconnected. When network difficulties are resolved, you may re-launch the iceBar application.

icePhone Connectivity Error

When logging in with the Use icePhone box enabled, you may experience an icePhone Connectivity Error. The following window will open:



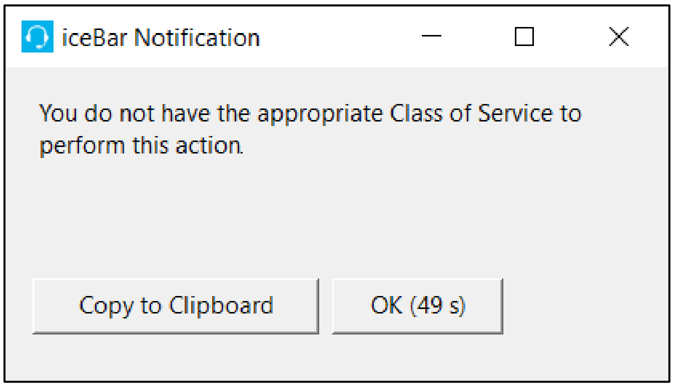
Click Ok. The following window will open:



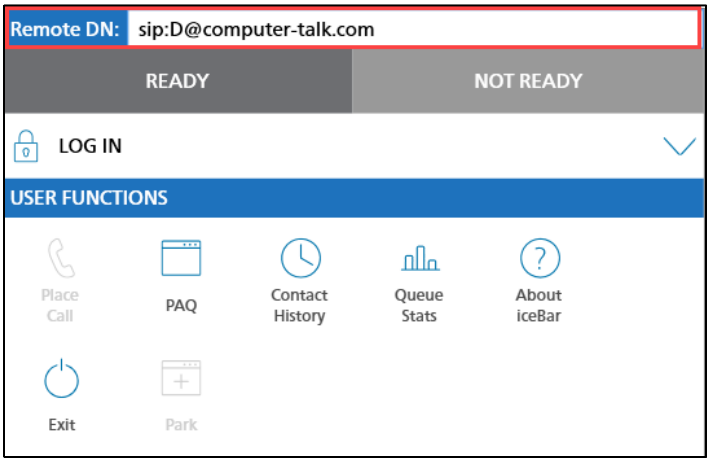
Click Ok to close the window.
To resolve this issue, please contact your administrator to check your icePhone settings.

Remote DN Connectivity Error

When logging into iceBar, your remote DN may automatically say *8:acs:* when logging in, if not configured. You will receive the following window pop up:

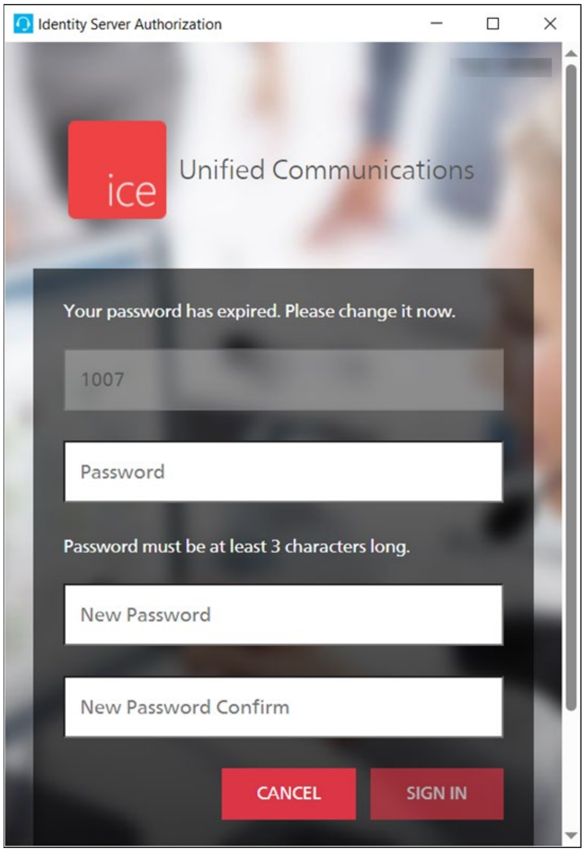


This happens when your ACS settings has been disabled in your Class of Service profile in iceAdministrator. You will have to configure your remote DN on iceBar in order to successfully log in:

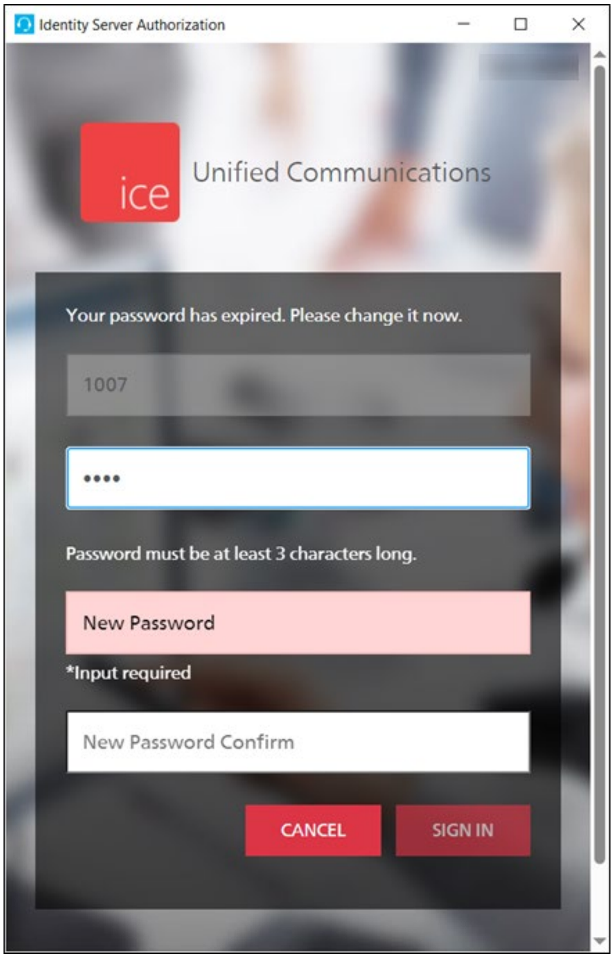


Password Expiry

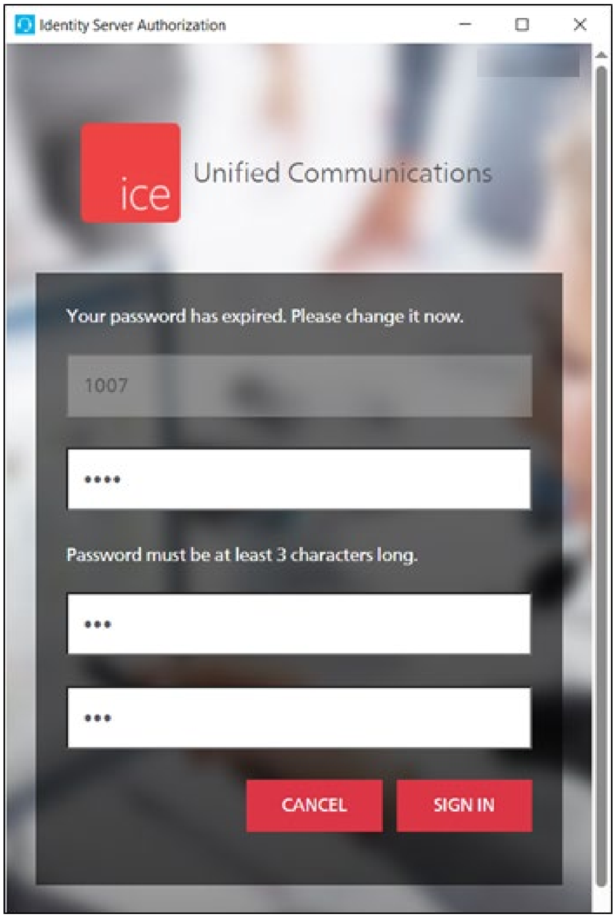
iceBar users may be required to change passwords for security reasons. If you see the following window after launching iceBar, you are required to change your password before you can proceed:



Enter your old password in the Password box.



Enter your new password in the New Password box and in the New Password Confirm box.

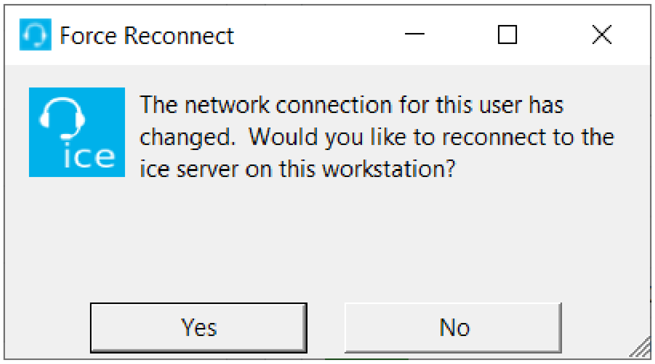


Click Sign In to proceed or Cancel to go back to the Sign in page.

For more information on passwords, please refer to Changing your iceBar Password on page 120.

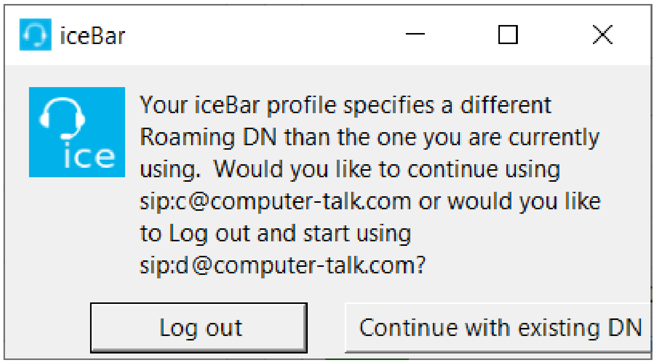
Force Disconnect

If your network connection has changed or you are logged into iceBar on two different workstations, you will receive the following message:



Select *Yes* to reconnect on your current workstation or *No* to cancel.

If you have changed your connection address on your new workstation, you will be prompted with the following message:

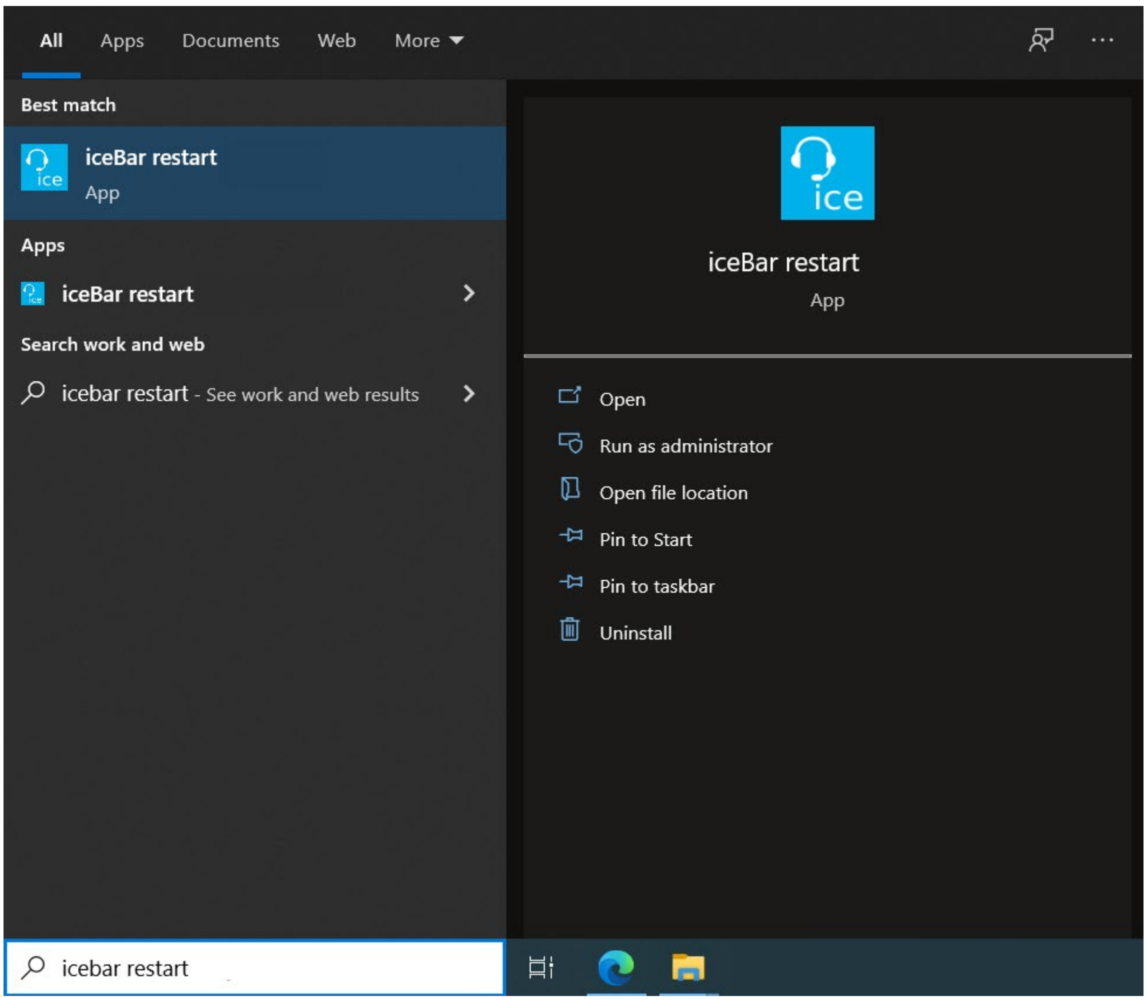


Select *Log out* to use the new Roaming DN. Select *Continue with existing DN* to continue using your current DN.

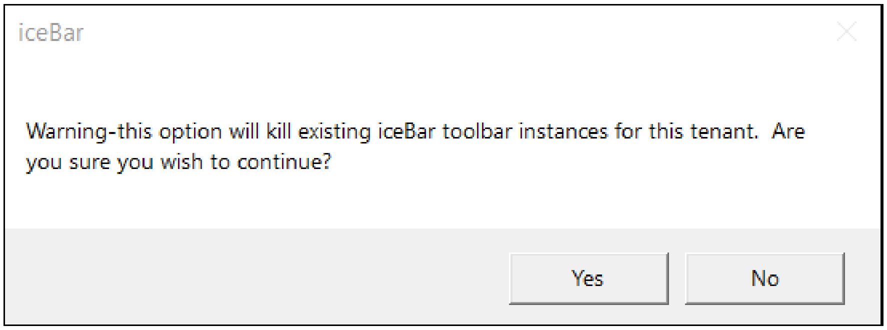
iceBar Restart

You may be asked to perform an iceBar restart to clear your iceBar settings.

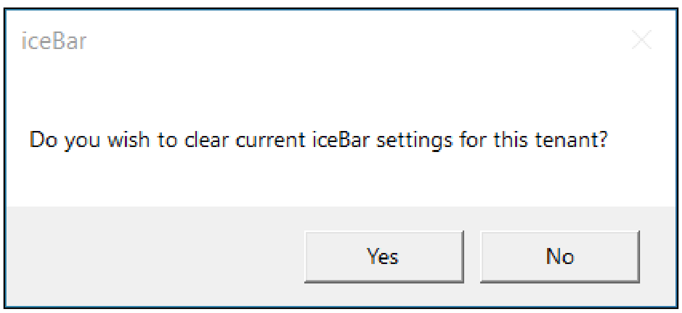
1. To do this, first launch the iceBar restart from your desktop.



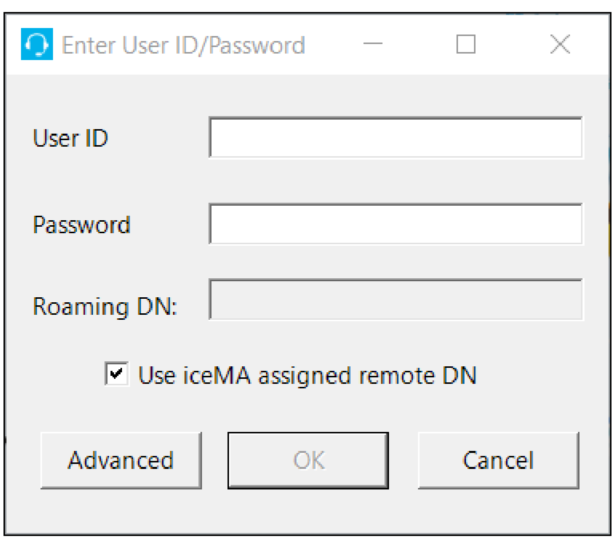
2. The following window will open. Select *Yes* to end all open instances of iceBar on your workstation and continue. To cancel and open iceBar without making any changes, select *No*. You will be taken to Step 4 to enter your User ID and Password.



3. When prompted to clear your iceBar settings, select *Yes* to clear or *No* to save your current settings.



4. You will then be prompted to enter your User ID and Password.



Note: Clearing your iceBar settings will also clear your user iceBar logs. For more information on the iceBar restart, please refer to the *HowTo - Supervisor Functions: iceBar Restart* video.

Chapter 2: iceBar Options

iceBar has many options for customization. In this chapter, you will learn about the various options available to you and how to configure them for optimal usability.

Topics covered in this chapter:

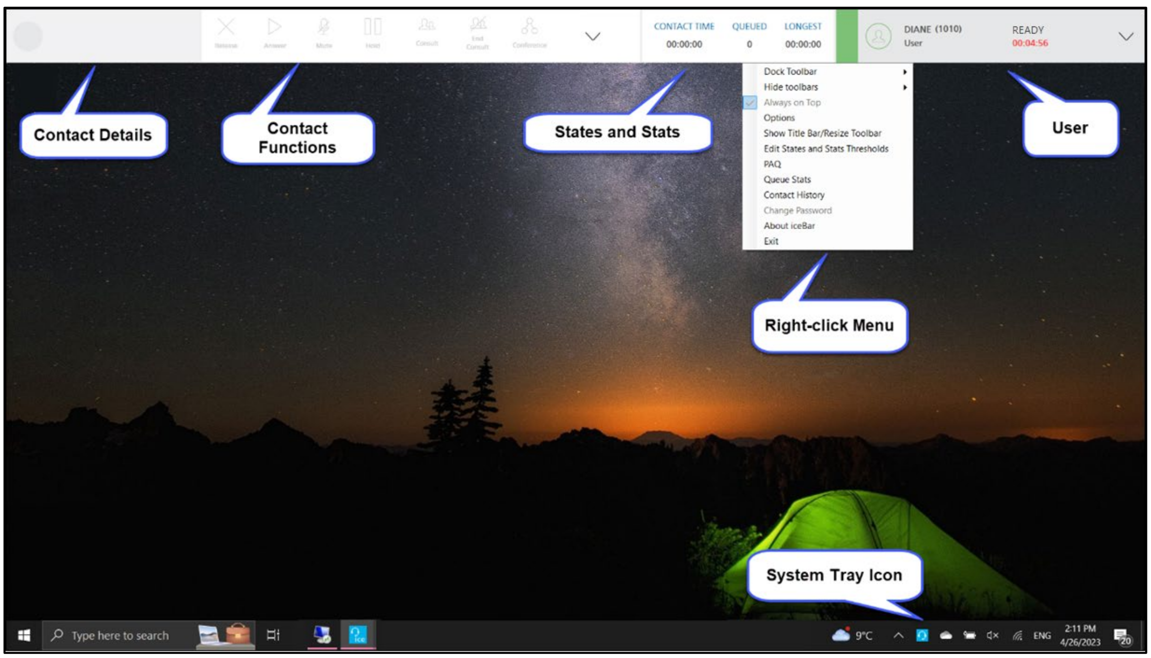
- Toolbar Options
- Setting Thresholds
- Notifications
- Call Options
- Startup Options
- IM Options
- LOB/Resolution Code Options
- Profiles
- Changing your iceBar Password

Toolbar Options

iceBar allows you to:

- Log on and handle contacts
- View information about your current state and the contacts you are receiving
- View a list of users and their current states
- View information about contacts waiting in queues
- Access other components of iceBar

Each time you launch the iceBar application, the **toolbar** occupies a portion of your computer screen. In this chapter, you will learn about the panels that make up iceBar, and how to configure them to meet your needs.



The toolbar is made up of a state sidebar and four panels:

- Contact Details
- Contact Functions
- States and Statistics
- User

Other components of iceBar include a Right-click Menu and a System Tray Icon.

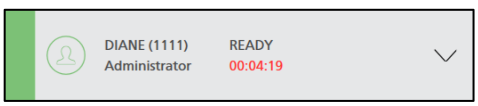
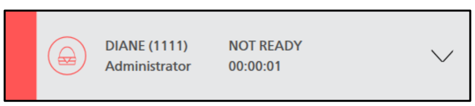
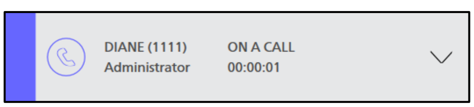
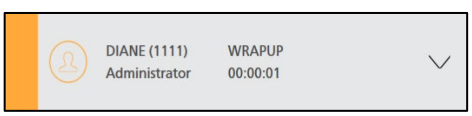
The following sections provide an overview of these panels and components and instructions on how to configure them to meet your needs.

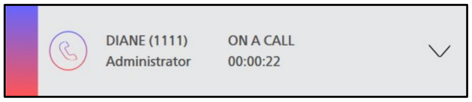
Understanding the User Panel

You can use the User Panel for easy access to user profile information including user's name, ID, state, and state time. The User Panel is also used for state change, logging in and out of ice, and logging on and off queues. The User Functions are also located in the User Panel.

Understanding the State Sidebar

The State Sidebar is a visual representation of the user's status. Once a user is logged on, the State Sidebar will be colored red or green based on the user profile configurations in iceAdministrator. Similarly, when the user accepts a call, email or IM, the State Sidebar changes color to reflect.

State Sidebar summary		
Sidebar Display	**Description**	**Page**
	**Ready:** user is ready to receive contacts	184
	**Not Ready:** user is not ready to receive contacts	184
	**On Contact:** user is currently speaking with a contact	187
	**Wrapup:** user has finished a call but is not yet ready to receive the next one	186

State Sidebar summary		
Sidebar Display	**Description**	**Page**
	**Pending State:** While on a contact, a user may select to be in a pending Not Ready state. When the contact is released, the user will be put into a Not Ready state.	188

User Profile

The User Profile section of the User Panel shows information regarding the profile that is currently configured to the toolbar and the current state.

User Panel	
Category	**Description**
Username	Your full name as it is configured in your iceAdministrator profile
User Type	Your user type. This can be User, Team Lead, Supervisor, or Administrator.
State	Your current state. Some possible states include: Ready, Not Ready, Logged Out, Held, Holding, Consulting, Conferencing, Meeting, Workflow, Alerting, In PAQ, On Call, On Email, On IM, and Wrapup.
State Time	Your state time is the duration of time that you have spent in your current state. When your state changes, this timer is reset.

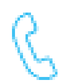
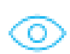
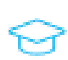
Other Functions

When you click on the User Panel, a drop-down menu is presented with the following additional functions:

Function Display	Use Function to…	Page
	Toggle between Ready and Not Ready states.	184
	Log in/out of ice and log on/off queues.	18

User Functions

User Functions is a section on the User Panel that provides the user with additional buttons. These buttons are not meant to be used to handle contacts. Instead, they are used to assist the user in other functions. The following are a few buttons that are placed in the User Functions by default:

Function Display	Use Function to…	Page
	Place an outbound call.	193
	Open user's contact history.	287
	Start an Instant Message.	233
	Start silent monitoring a user, or to notify you that a supervisor or administrator is actively silently monitoring you.	202
	Start coaching a user, or to notify you that a supervisor or administrator is actively coaching you.	204

Note: The user can customize the User Functions to show buttons they want to use. The user can also hide buttons they don't want to use.

Understanding the Contact Details Panel

The Contact Details panel is similar to call display on a telephone. This portion of the toolbar shows the name and number of an inbound caller.

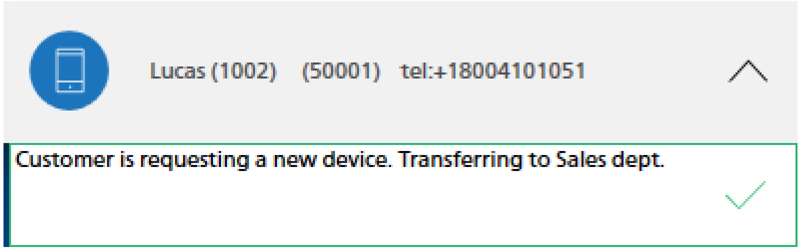
Unlike a traditional telephone this panel can also show:

- 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. The user data can be edited or added to as required.

In the scenario below, Lucas is on a call with a customer. Lucas is updating the notes in the User Data section to reflect his discussion with the customer.



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 user name, or the name of an email sender. In the example above, it's "Pow".

Information in the Contact Details panel	
Information	**Description**
<Originator Address>	Displays the phone number of a caller, the User ID of a caller or the email address of a sender. In the example above, it is 4128029297.
<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 user name appears in this field. In the example above, Target Name is not displayed because it was not configured in iceAdministrator.
<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. In the example above, Target ID is 6809.
<Receiving Address>	When receiving a call, displays the number the caller has dialed. When receiving an email, displays the email address to which the message has been sent. When placing a call, displays the number that you have dialed. In the example above, it is 18009272828.
<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 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). Click on the field to change it to an edit box. Press *Enter* once you have entered or modified the data.

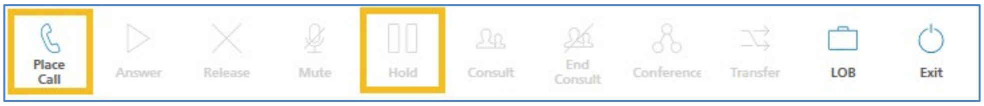
Note:

- The User Data field can be locked down. For more information, see the Toolbar Properties section on page 38.
- The ice Administrator can configure the User Data field. For example, it may be changed to show the account number of the caller. For more information, refer to Form Settings on page 322.
- 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.

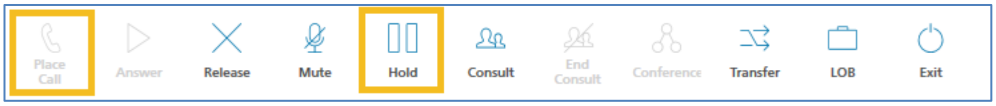
Understanding the Contact Functions Panel

You can use the **Contact Functions Panel** for easy access to answer calls, place callers on hold, and perform many other contact control functions. Common buttons allow users to place calls on hold, consult, conference, and transfer contacts.

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 illustration 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 become available for use, as shown below.

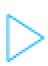
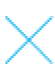


When a user is on a call, IM or email, buttons such as Release, Hold, Consult, Transfer and Conference become available on the Contact Functions panel. Some may also be disabled depending on the modality of the contact. For example, Consult is not currently available when on an IM.

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.

Note: The buttons may be displayed differently depending on your configuration. The name of the button may be displayed to the right of the icon or the name of the button may not be displayed (i.e., you will only see the icon). For more information on how to configure the button display, see the Toolbar Properties section on page 38.

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

Buttons panel summary			
Button	**Available when**	**Use Button to...**	**Page**
 Logon	The application is open.	Log on to ice.	18
 Logoff	Logged on.	Log off of ice.	21
 Answer	Alerting with a contact.	Answer a call alerting at your workstation if off-hook.	190
 Release	On a contact.	End the contact you are on.	200
 Place Call	Logged on.	Place a call to another user, or to an external number.	126
 Start Email	Logged on.	Initialize an outbound email.	251

Buttons panel summary			
Button	**Available when**	**Use Button to…**	**Page**
Start IM	Logged on.	Start an IM conversation with another user.	248
Hold	On a call.	Place a caller on hold. The caller hears music while on hold.	198
Mute	On a call.	Mute your microphone.	199
Transfer	On a call.	Transfer a caller to another user, queue or external number.	225
Consult	On a call.	Consult a third party when you are on a call.	257
End Consult	On a consult or on a conference.	While on a consult, release the active party and return to the caller on hold OR While on a conference, release the third party and stay on the line with your original caller.	259
Conference	On a consult.	Initiate a conference call with your original caller while you are consulting.	260
Pick	Logged on.	Pick a contact out of a queue or Personal Access Queue (PAQ) OR pick up a call that is ringing or held at another user's workstation.	151

Buttons panel summary

Button	Available when	Use Button to...	Page
Call Forwarding	The application is open.	Set call forwarding options.	88
Swap	On a call and a caller is waiting in your PAQ.	Swap your current call with a caller waiting in your PAQ.	275
Park	On a contact.	Park a caller in your PAQ.	149
LOB	On a contact.	Tag a call with a Line of Business code.	277
Record	On a contact.	Initiate a recording of the current call. The button blinks if your conversation is being recorded.	206
Recording Privacy Mode	User is on a call.	Toggle to interrupt/resume a recording that may or may not be in progress.	208
Silent Monitor	Logged on	Receive a notification when an ice Administrator is silently monitoring you or initiate silent monitoring.	202
Coach	Logged on	Receive a notification when an ice Administrator is coaching you or initiate silent monitoring.	204
Voicemail	Logged on.	Access your third-party voicemail system.	90

Buttons panel summary			
Button	**Available when**	**Use Button to...**	**Page**
Quick Text	Application is open.	Send a Quick Text message to another iceBar user.	283
Emergency	Logged on.	Send an emergency alert message to emergency contacts.	285
PAQ	Application is open.	View Personal Access Queue (PAQ) window.	134
Apply Resolution Code	In Email state.	Attach a resolution code to the email currently being handled. Also used to create new Resolution codes.	220
Contact Search	Logged on, when in Ready state.	Search for contacts and their SIP addresses. iceBar uses that information to populate the Enter number to call dialog box.	106
Contact History	Application is open.	View Contact History.	287
Queue Stats	Application is open.	View Queue Statistics.	155
iceCampaign	Your contact center is enabled for iceCampaign.	Open the iceCampaign user interface in a pop-up window.	296
Elevate	User is on a call or IM.	Create a separate multi-party conference, for application sharing and video.	288

Buttons panel summary			
Button	**Available when**	**Use Button to...**	**Page**
Options	Application is open.	Open the iceBar Options window to configure iceBar.	37
Change Password	Application is open.	Open the Change Password window to change your password.	120
States & Stats	Application is open.	Open the States and Statistics section of iceBar in a separate window.	63
Profiles	Application is open.	Open to add, modify, or delete user profiles.	111
Exit	Application is open.	Close iceBar.	21
About iceBAR	Application is open.	Opens the About iceBar window.	75
Add Participant	On a call.	Add additional participants to a call	264
Conference Roster	In the In Meeting state.	View all participants on the call	265
Request New Contact	In a multi-contact user state.	Request to receive a new contact during multi-contact handling	290

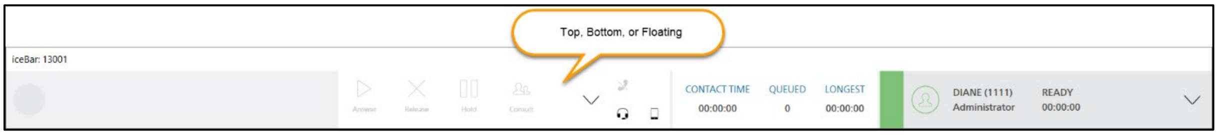
Configuring the Buttons: Location

You can access the iceBar buttons in several different ways. For example, you might choose to use it exclusively within the standalone toolbar. Alternatively, you might choose to use only the system tray icon and perform all of your contact handling from there. The following table describes all of the possible locations for the iceBar buttons.

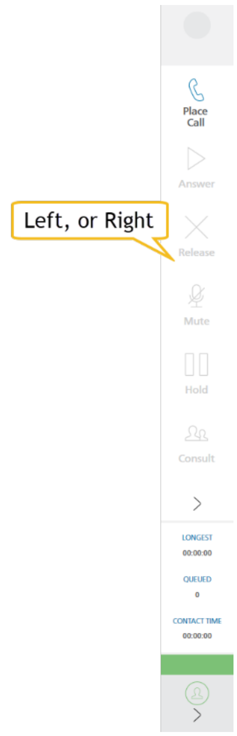
Locations for Buttons Panel	
Location	**Description**
Standalone Toolbar	This optional docked toolbar contains the four panels that make up iceBar: Contact Details, Contact Functions, User Functions, and States/Stats. The Contact Functions panel and User Functions panel can be configured to have different buttons to fit user requirements.
System Tray	The system tray iceBar icon sits in your system tray at the bottom of your screen.

Docking and Undocking the Standalone Toolbar

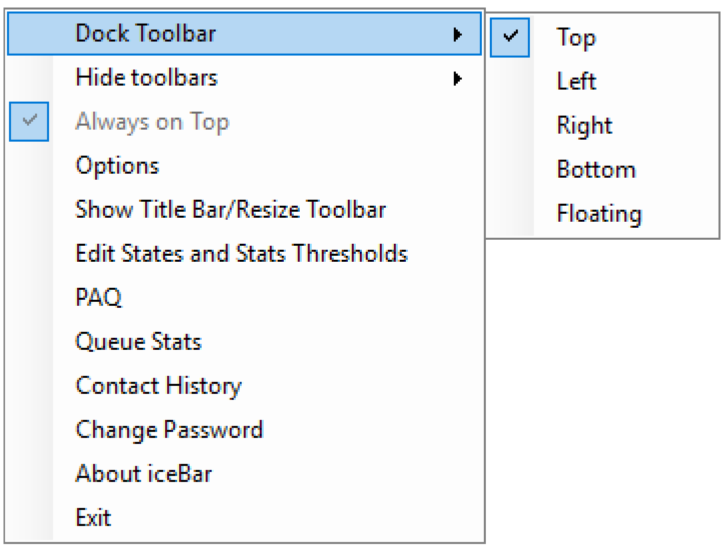
iceBar's standalone toolbar can dock to the top, bottom, left, and right of the user's screen to facilitate easy contact handling. This also applies to a workstation with multiple screens (i.e., the toolbar can be docked to a second or third screen). The toolbar can also be undocked using the floating option which allows the user to move the toolbar freely around the screen.



<u>To dock the standalone iceBar:</u>



1. Right-click any blank space on the iceBar.
2. Hover over 'Dock Toolbar'



Five options will appear: Top, Left, Right, Bottom, and Floating.

3. To dock the toolbar horizontally select 'Top' or 'Bottom'. To dock the toolbar vertically select 'Left' or 'Right'.

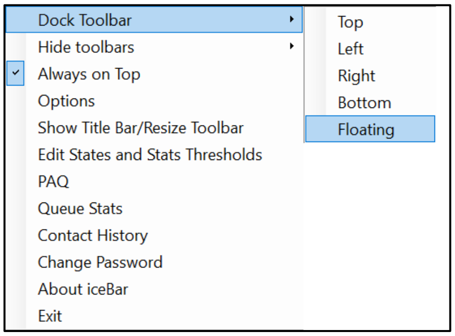
   Note: You can choose which monitor you wish to dock the standalone iceBar to, by moving the iceBar to that monitor before following the docking instructions above.

<u>To undock the standalone toolbar</u>

1. Right-click any blank space on the iceBar.

A menu appears.

2. Hover over ‘Dock Toolbar’



3. To undock the toolbar select ‘Floating’. The toolbar remains horizontal when ‘Floating’ is selected.

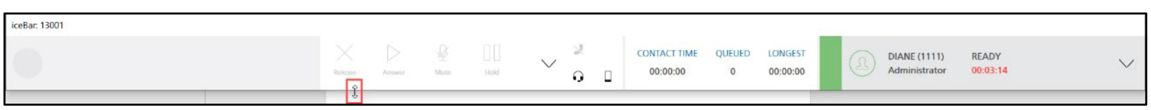
Note: If you are running Windows, you may experience an issue when trying to dock your toolbar on a secondary display with scale settings that are different from your primary monitor. For best results with multiple displays, ensure your scaling settings between your primary and secondary monitors are closely matched.

Resize the Toolbar

You can change the total length of the iceBar only when the toolbar docking is set to floating. While docked, the different panels can be resized, however, the States and Statistics panel is a fixed size.

<u>**Change the Height of the Toolbar**</u>

1. Place your cursor at the bottom of the toolbar. The cursor should change.



2. Click and drag to the desired size. The larger the toolbar the fewer icons that will fit on the contacts tab.

Change the Width of the Contact Details, Contact Functions, and User User Functions panel

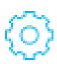
1. Place your cursor over the distinct areas.

2. Click and drag to the desired size.

Editing the Buttons Panel: Appearance

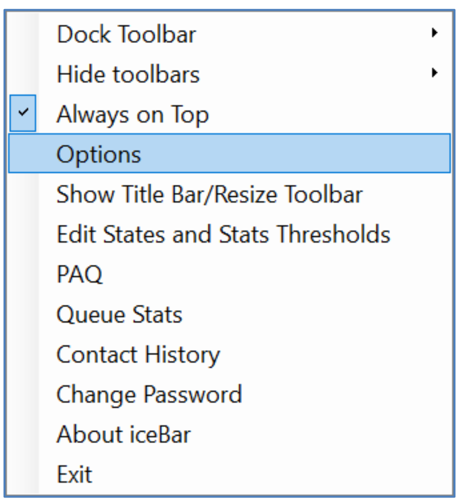
You can choose which buttons appear on the user and contact functions toolbars. Refer to the table in the previous section for a complete description of the buttons.

Adding Buttons to the Toolbar

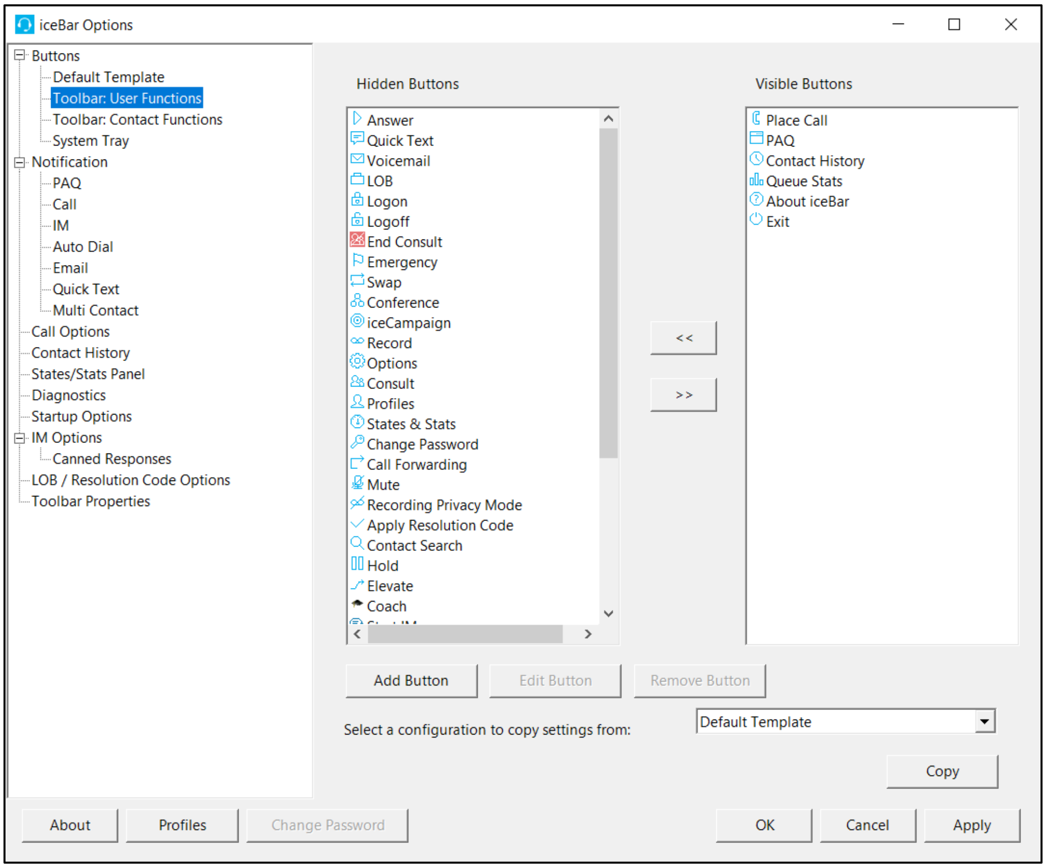


Note: If you have the Options button configured on the toolbar, click on it and proceed to step 2.

1. Right-click anywhere on the iceBar and click *Options*.



2. Highlight the toolbar that you wish to modify. Two columns are now displayed to the right of the list.



The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.

3. In the column on the left, highlight the button that you wish to add to the panel.

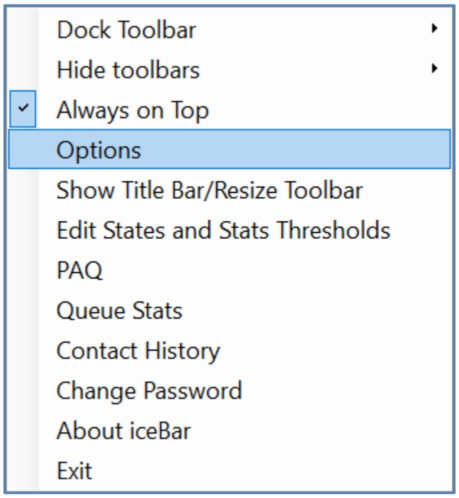
4. Click to move the selected button to the right column. The button is added to the panel when you click *Apply*.
5. Click *OK* if you are finished making changes.

Note: By default, inactive buttons appear greyed out on the toolbar. If you wish to have all buttons appear in color, select the checkbox “Do not gray out disabled buttons”.

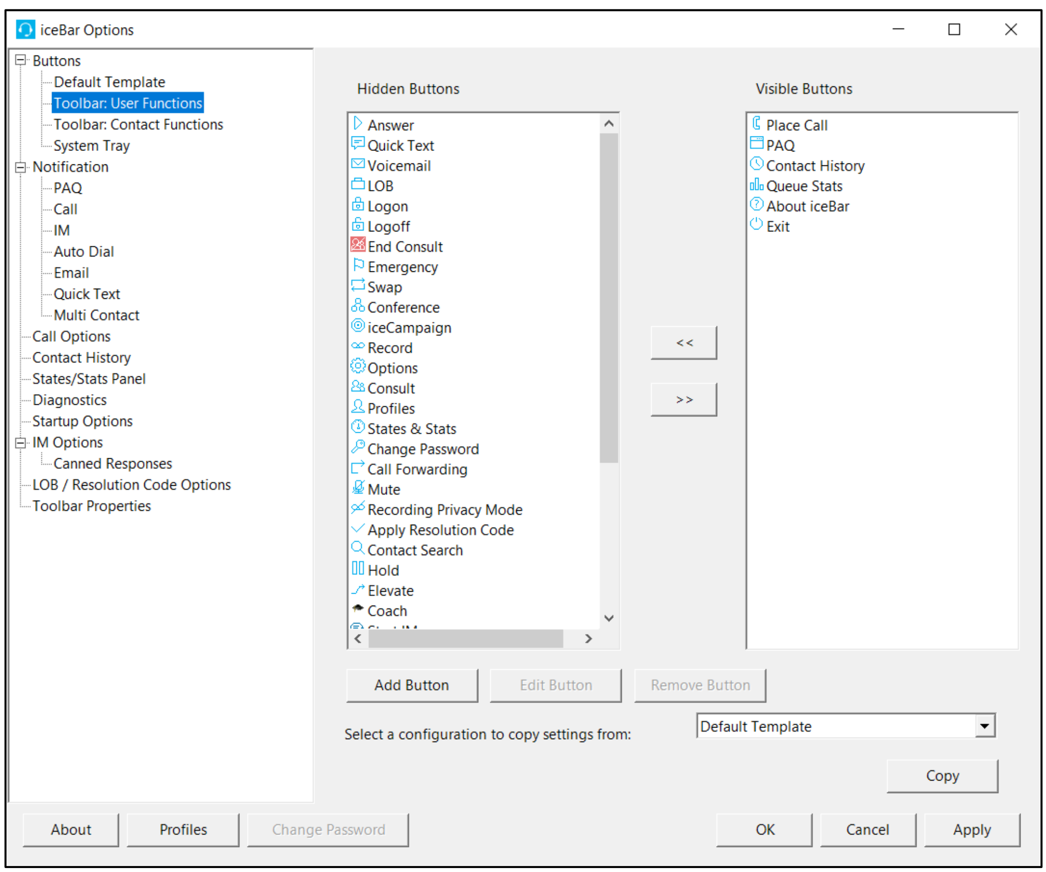
Removing Buttons to the Toolbar

Note: If you have the Options button configured on the toolbar, click on it and proceed to step 2.

1. Right-click anywhere on the iceBar and click *Options*.



2. Highlight the toolbar that you wish to modify. Two columns are now displayed to the right of the list.



The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.

3. In the column on the right, highlight the button that you wish to remove from the Buttons panel.
4. Click

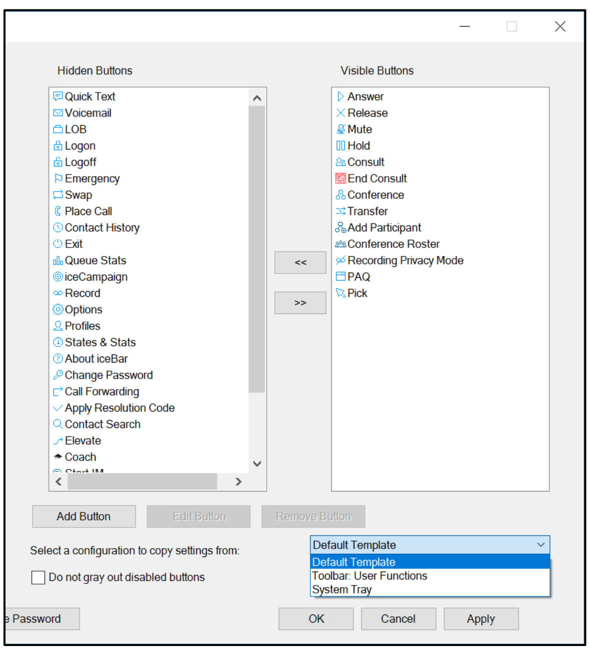
to move the selected button to the left column. The button is removed from the panel when you click *Apply*.
5. Click *OK* if you are finished making changes.

Note: By default, inactive buttons appear greyed out on the toolbar. If you wish to have all buttons appear in color, select the checkbox “Do not gray out disabled buttons”.

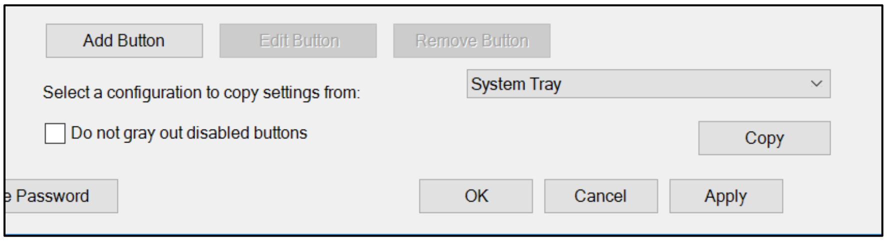
Copying the Settings from Another Toolbar

An alternative way to configure your Buttons panel is to copy the settings from another toolbar:

1. Navigate to the panel you wish to configure as outlined in steps 1 – 3 above.
2. Notice the drop-down menu at the bottom of the dialog box, entitled ‘Select a Toolbar to Copy Settings From’:



3. Select a toolbar you wish to copy from by highlighting it in the drop-down list.
4. Click *Copy*.



5. Notice that the Hidden and Visible columns are now populated with the buttons associated with the copied toolbar.

6. Click *Apply*. Click *OK* or *Cancel* to exit the Options window.

Note: If you wish to hide the Buttons panel from view, refer to iceBar options on page 37.

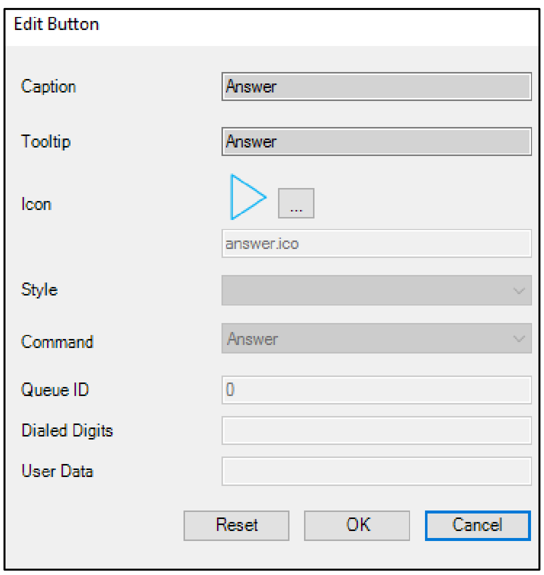
Customize Buttons

iceBar allows you to edit the appearance of a particular button by changing some of its properties, such as its icon, tool tip, and caption. Custom Buttons can be edited further, as detailed in the steps that follow.

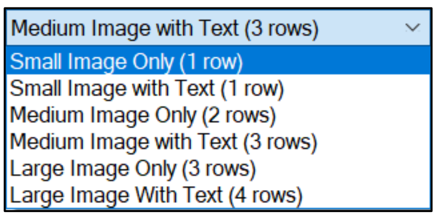
To edit a button:

If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.
2. A menu appears.
3. Select 'Options'.
4. The iceBar Options menu appears.
5. Select 'Buttons' from the tree view by either double-clicking on 'Buttons', or by single clicking the '+' beside 'Buttons'.
6. Locate the button you wish to edit on any of the Buttons panels on which it appears.
7. Select the button by highlighting it with a single-click.
8. Click *Edit Button*. A dialog box appears:



9. Make the desired changes outlined in the table below.
10. Click *OK* to apply your changes or click *Reset* or *Cancel* to discard your changes.

<table>
<tr><th colspan="2">Edit Button Options</th></tr>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>Caption</td><td>Edit the text that will be displayed in the caption.</td></tr>
<tr><td>Tooltip</td><td>Edit the text that will be displayed in the tooltip section.</td></tr>
<tr><td>Icon</td><td>Change the icon.
1. Click the ellipsis button to open the 'select icon' window.
2. Click on the desired icon you wish to use
3. Click OK to apply your changes or Cancel to discard your changes.</td></tr>
<tr><td>Style</td><td>Click the drop-down button to select a size (i.e., Small, Medium, or Large) and Image Only or Image with Text. Both criteria will dictate how many rows are required for the button. Based on the Rows per Column field, the button displayed button will range in size. For more information, refer to the Toolbar Properties section on page 38.


Note: This option is only available when the icon is in visible buttons field.</td></tr>
<tr><td>Command</td><td>Click the dropdown menu to select the command that you wish to associate with this button.
Note: This option is only available for new icons.</td></tr>
<tr><td>Queue ID</td><td>Enter a Queue ID to be associated with this button, if applicable.
Note: This option is only available for new icons.</td></tr>
</table>

Edit Button Options	
Parameter	**Description**
Dialed Digits	Enter Dialed Digits to be associated with this button, if applicable. **Note:** This option is only available for new icons.
User Data	Enter User Data to be associated with this button, if applicable. **Note:** This option is only available for new icons.

Adding Buttons

iceBar allows you to add custom buttons with additional capabilities to iceBar.

Note: You will not be able to add both the End Off-hook and Request Off-hook buttons. These buttons will only be available if you have icePhone enabled in your user configuration.

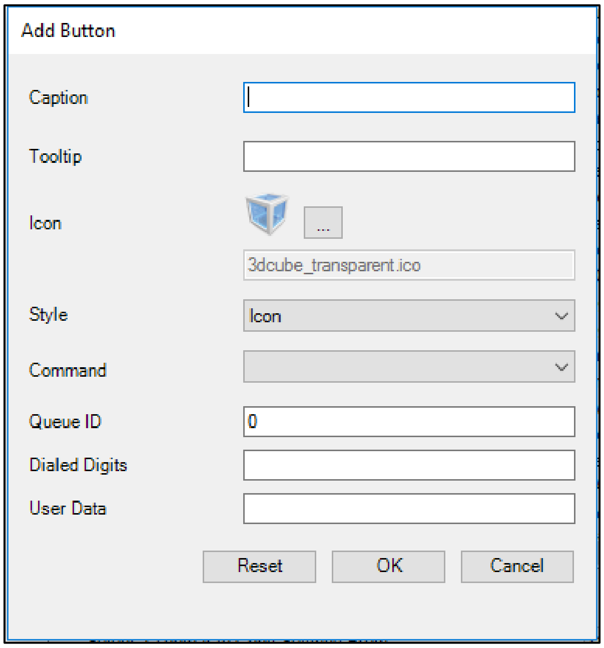
To add a button:

Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.

   A menu appears.
2. Select ‘Options’.

   The iceBar Options menu appears.
3. Select ‘Buttons’ from the tree view by either double-clicking on ‘Buttons’, or by single clicking the ‘+’ beside ‘Buttons’.
4. Select the button panel where you wish to add the button.
5. Click *Add Button*. A dialog box appears:



6. Add the information about the new button.

Note: More information about the parameters in the table below

7. Click *OK* to add the new button or click *Reset* or *Cancel* to discard your changes.

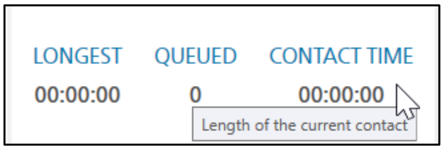
Add Button Options	
Parameter	**Description**
Caption	Insert the text that will be displayed in the caption.
Tooltip	Insert the text that will be displayed in the tooltip section.
Icon	Add icon. Click the ellipsis button to open the ‘select icon’ window. Click on the desired icon you wish to use Click *OK* to apply your changes or *Cancel* to discard your changes.

Add Button Options	
Parameter	**Description**
Style	Click the drop-down button to select whether you wish for this button to display an icon only, text only, or both icon and text.
Command	Click the drop-down menu to select the command that you wish to associate with this button.
Queue ID	Enter a Queue ID to be associated with this button, if applicable.
Dialed Digits	Enter Dialed Digits to be associated with this button, if applicable.
User Data	Enter User Data to be associated with this button, if applicable.

Understanding the States and Statistics Panel

The **States and Statistics panel** allows you to view information about your status, as well as a summary of real-time and statistical information for the queues selected in the 'Queue Statistics' window.

Hover your mouse pointer over a field to see its name in a tool tip.



Note: The 'Queue Statistics' window displays full details on each queue's statistics and real-time information. By default, Queue Statistics shows information for your assigned queues, but Queue Statistics can be configured to show a custom list of queues. For more details on configuring the 'Queue Statistics' window, refer to page 161.

The table below describes each field that you can use in the States and Statistics panel. The first two fields are specific to you when you are logged on to iceBar. The remaining fields show information about the queues and are not specific to you (e.g., 'Handled' represents the total number of contacts handled by all users).

States and Statistics Panel	
Category	**Description**
Contact Time	The amount of time you have been handling your current contact. This includes Hold, Consult, and Conference time. The timer resets once a call is released.
GOS	Grade of Service (GOS) or Service Level for the current day. The GOS is the percentage of contacts that have been handled in less than the Target ASA (Average Speed of Answer), a threshold that is defined for the queue in iceAdministrator. A contact is included in the GOS calculation for a queue whether it is handled in the source queue or an overflow queue. When multiple queues are configured in the Queue Statistics window, this field reflects the average GOS for all configured queues.
GOS2	Grade of Service 2 (GOS2) is calculated in the same manner as GOS, as described above. However, to calculate GOS2, Target ASA2 is used, as defined for the queue in iceAdministrator.

States and Statistics Panel	
Category	**Description**
Queued	The number of contacts currently waiting in the queue. When multiple queues are configured in the Queue Statistics window, this field reflects the total calls waiting in all configured queues.
Longest	The number of seconds that the oldest active contact has been waiting in the queue. When multiple queues are configured in the Queue Statistics window, this field reflects the oldest contact for all configured queues.
Delay	The average time contacts spend in the queue. When multiple queues are configured in the 'Queue Statistics' window, this field reflects the average delay for those queues.
Handled	The total number of queued contacts that have been handled in the contact center. When multiple queues are configured in the 'Queue Statistics' window, this field reflects the total number of contacts handled.
ice Time	The current time, according to the ice server. Time of day conditions on ice (e.g., routing calls to the queues between 8am and 8pm) are based on ice server time. You may want to view the server time (which may be different from the time on your PC) if you wish to log on to the queue before it opens or stay logged on to a queue until it is closed. **Note:** If you change the time on your computer, ice time on iceBar will be modified temporarily (i.e., it will no longer be the same as the server time) but will correct itself.

Configuring the States and Statistics Panel

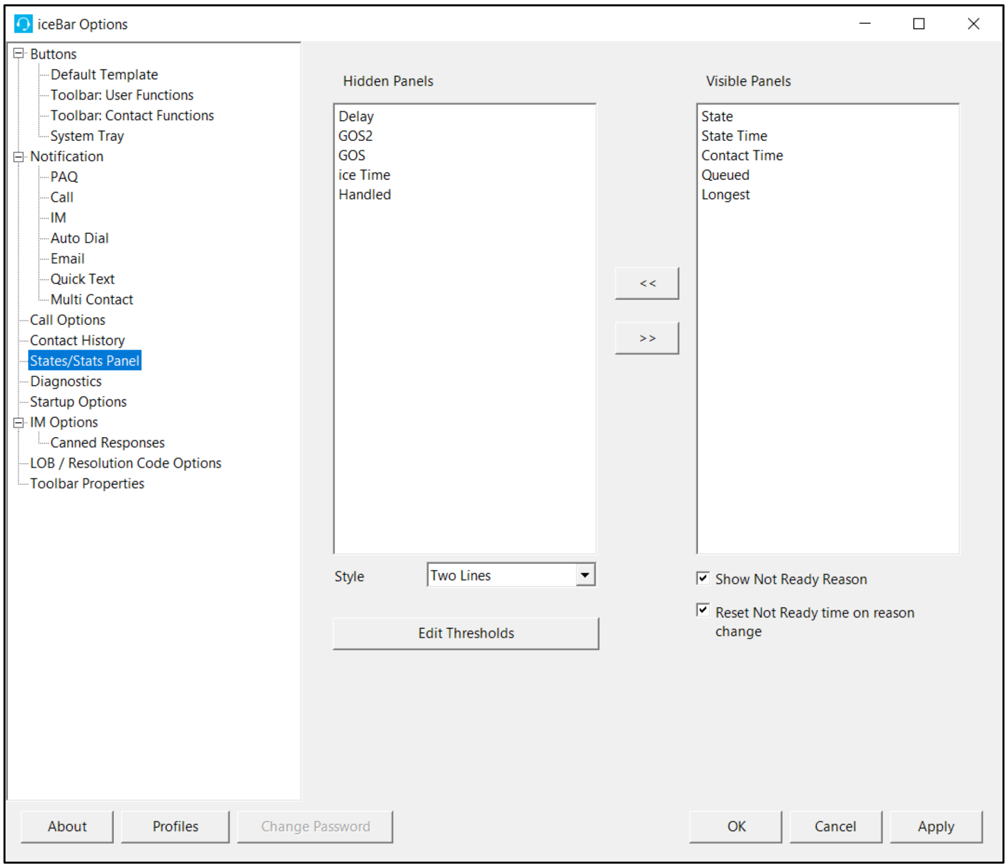
As with the Buttons panel, you can configure the fields to be displayed on the States and Statistics panel. In addition, you can set colors for the panel using the Options menu.

For a complete description of the information presented in this section, refer to the States and Statistics panel table on page 63.

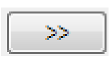
To configure the States and Statistics panel:

Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.
2. A menu appears.
3. Select 'Options'.
4. The iceBar Options menu appears.
5. Highlight 'States/Stats panel' from the tree view by clicking on it.
6. Two columns are now displayed to the right of the list.



7. Click a field in the Hidden Panels list that you wish to add to the States and Statistics panel.

8. Click  to move the selected field to the right column.

The field is added to the panel when you click *Apply*.

9. Click a field in the Visible Panels list that you wish to remove from the States and Statistics panel.

10. Click  to move the field to the left column.

11. The field is removed from the States and Statistics panel when you click *Apply*.

12. You can select whether the States and Statistics panel information appear as one line or as two lines. You may also choose not to have labels marking the fields. Select your preferences from the associated drop-down list.

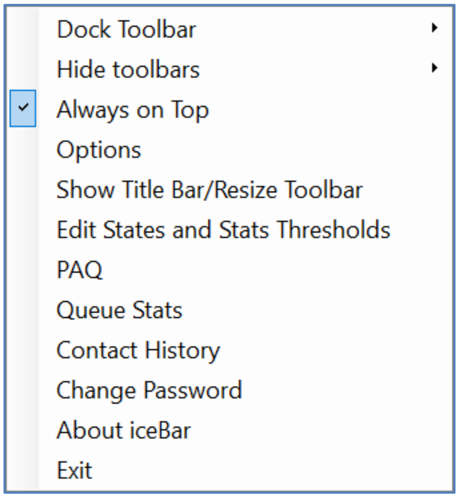
13. If you wish to have your user state reflect your Not Ready Reason, enable the checkbox “Show Not Ready Reasons”.

14. If you wish for the user’s State Time counter to reset upon changing their Not Ready Reason, enable the checkbox ‘Reset Not Ready time on reason’ change.

15. Click *OK* if you are finished making changes.
16. You may configure thresholds for the States and Statistics panel by clicking 'Edit Thresholds' in this window. Alternatively, it can be accessed through the Right-click menu as described in the section that follows.

The Right-click Menu

A drop-down menu, accessed by right clicking on a blank area of iceBar, allows you to modify the toolbars and access other components of iceBar.



The following table explains the features and functionalities of the components of iceBar accessible in the right-click menu.

Components of Right-click Menu		
Menu Option	**Sub Menu Options**	**Function**
Dock Toolbar	Top Left Right Bottom Floating	Allows you to configure how and where the iceBar appears on your screen. iceBar can be **Docked** or **Floating.** When docked, iceBar is attached to the edge of your screen. When floating, iceBar floats freely over any other applications you may be running.
Hide Toolbars	User Panel Contact Functions Contact Details States and Stats	iceBar is comprised of four panels. You may configure iceBar so that any or all of these panels are visible or hidden.

Components of Right-click Menu		
Menu Option	**Sub Menu Options**	**Function**
Always On Top	N/A	If the floating toolbar is used, the option is available to have iceBar appear always on top of other applications. **Note:** If your iceBar is set to Docked, users can deselect the "Always on Top" option.
Options	N/A	You can access and configure many options in iceBar, pertaining to what information you view and how it is displayed. The Options component is where you can change your password and make changes to your profile(s). For more information, refer to Chapter 2: iceBar Options.
Show Title Bar/Resize Toolbar	N/A	Not available in this version of iceBar. The menu option will be greyed out.
Edit States/Stats Thresholds	N/A	Allows you to set your own thresholds and configure how thresholds are displayed in your States/Stats panel.
PAQ	N/A	Opens Personal Access Queue (PAQ). For more information, refer to Chapter 4: Personal Access Queue
Queue Stats	N/A	Opens Queue Statistics. For more information, refer to Chapter 5: Queue Statistics.
Contact History	N/A	Opens Contact History. For more information, refer to Chapter 3: Contact History.

Components of Right-click Menu		
Menu Option	**Sub Menu Options**	**Function**
Change Password	N/A	Allows you to change your iceBar password.
About iceBar	N/A	Displays information on iceBar version, profile, User ID, and Client IP address(es). This also provides options to configure iceBar client configuration. For more information, please refer to About on page 75.
Exit	N/A	Closes the iceBar application.
Set as Primary Contact	N/A	Allows the user to set the focus contact. Only available when the user right-clicks the Contact Details panel and if the user has Multi-Contact Handling configured for their profile.
Copy User Data	N/A	Allows the user to copy the contents of the user data field. Only available when the user right-clicks the Contact Details panel.

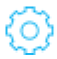
Understanding the System Tray Icon

Similar to the Buttons panel, the **System Tray** icon can be configured with menu options that allow you to handle contacts and access other components of iceBar. In fact, you might choose to perform all contact handling from the System Tray icon. The System Tray icon is a smaller version of the iceBar icon on your desktop.

You can use the System Tray icon in the following ways:

- Click the System Tray icon to view menu options. Left-click the menu option you wish to use. You can use these menu options in the same way that you would use the Buttons panel. For more information, refer to Chapter 7: Handling Contacts.
- View the System Tray icon to determine whether your state is Ready, Not Ready, Wrapup, or Disconnected.

Configuring the System Tray



Options

<u>To change the menu options displayed in the System Tray icon menu:</u>

Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.

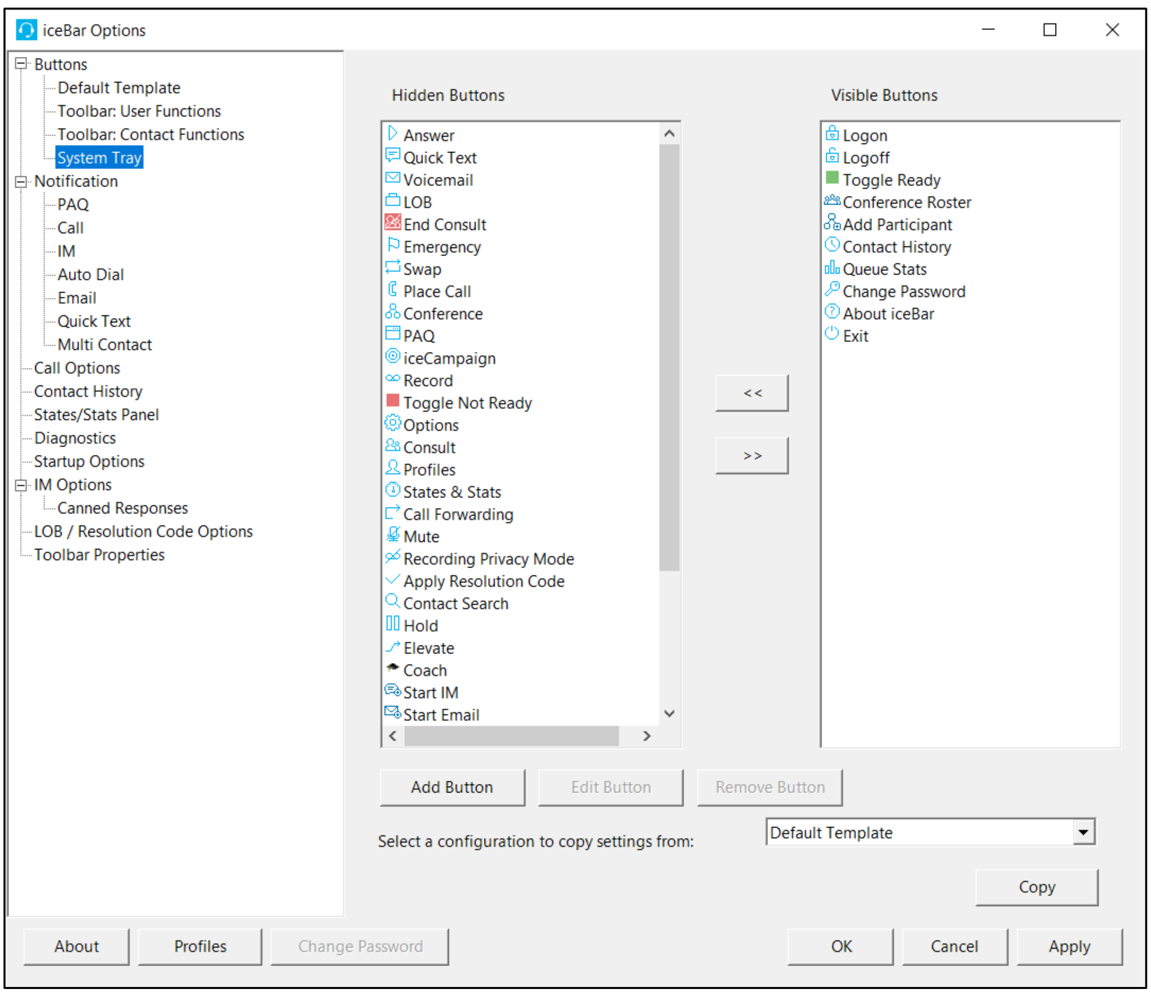
   A menu appears.

2. Select 'Options'.

   The iceBar Options menu appears.

3. Highlight 'System Tray' from the tree view by clicking on it.

   Two columns are now displayed to the right of the list.



4. Click a button in the Hidden Buttons list that you wish to add to the System Tray menu.
5. Click >> to move the selected button to the right column.

   The field is added to the menu when you click *Apply*.
6. Click a button in the Visible Buttons list that you wish to remove from the System Tray menu.
7. Click << to move the button to the left column.

   The button is removed from the System Tray menu when you click *Apply*.
8. Click *OK* if you are finished making changes.

Configuring the Toolbar Properties

Users have the ability to customize their toolbar further by choosing which aspects to keep hidden and which to keep visible. This is specific to the panels, buttons, and contact details.

Show and Hide Panels

To show a panel:

1. Under iceBar Options select Toolbar Properties. At the top there will be two columns – left is for hidden panels, right is for visible panels
2. In the left column highlight the panel you wish to show on your toolbar.
3. Click >> to move the panel to the right column. The panel is added to the toolbar when you click *Apply*.
9. Click *OK* if you are finished making changes.

To hide a panel:

1. Under iceBar Options select Toolbar Properties. At the top there will be two columns – left is for hidden panels, right is for visible panels
2. In the right column highlight the panel you wish to hide on your toolbar.
3. Click << to move the panel to the left column. The panel is removed from the toolbar when you click *Apply*.
4. Click *OK* if you are finished making changes.

Customize Button Settings

With every iceBar button there is an associated image and text. Users are given the freedom to decide what they would like displayed on their iceBar toolbar.

Show and hide Contact Details

Contact details include originating and received contact information, target information, and user data. Users have the ability to customize what they would like to see when they are handling a contact.

To show a Contact Detail:

5. Under iceBar Options select Toolbar Properties. Under Contact there are two columns – left side is for hidden details and right side is for visible details
6. In the left column highlight the contact detail you wish to show on your toolbar.
7. Click

 to move the contact detail to the right column. The detail is added to the toolbar when you click *Apply*.
8. Click *OK* if you are finished making changes.

To hide a Contact Detail:

1. Under iceBar Options select Toolbar Properties. Under Contact there are two columns – left side is for hidden details and right side is for visible details
2. In the right column highlight the contact detail you wish to hide on your toolbar.
3. Click

 to move the contact detail to the left column. The detail is removed from the toolbar when you click *Apply*.
4. Click *OK* if you are finished making changes.

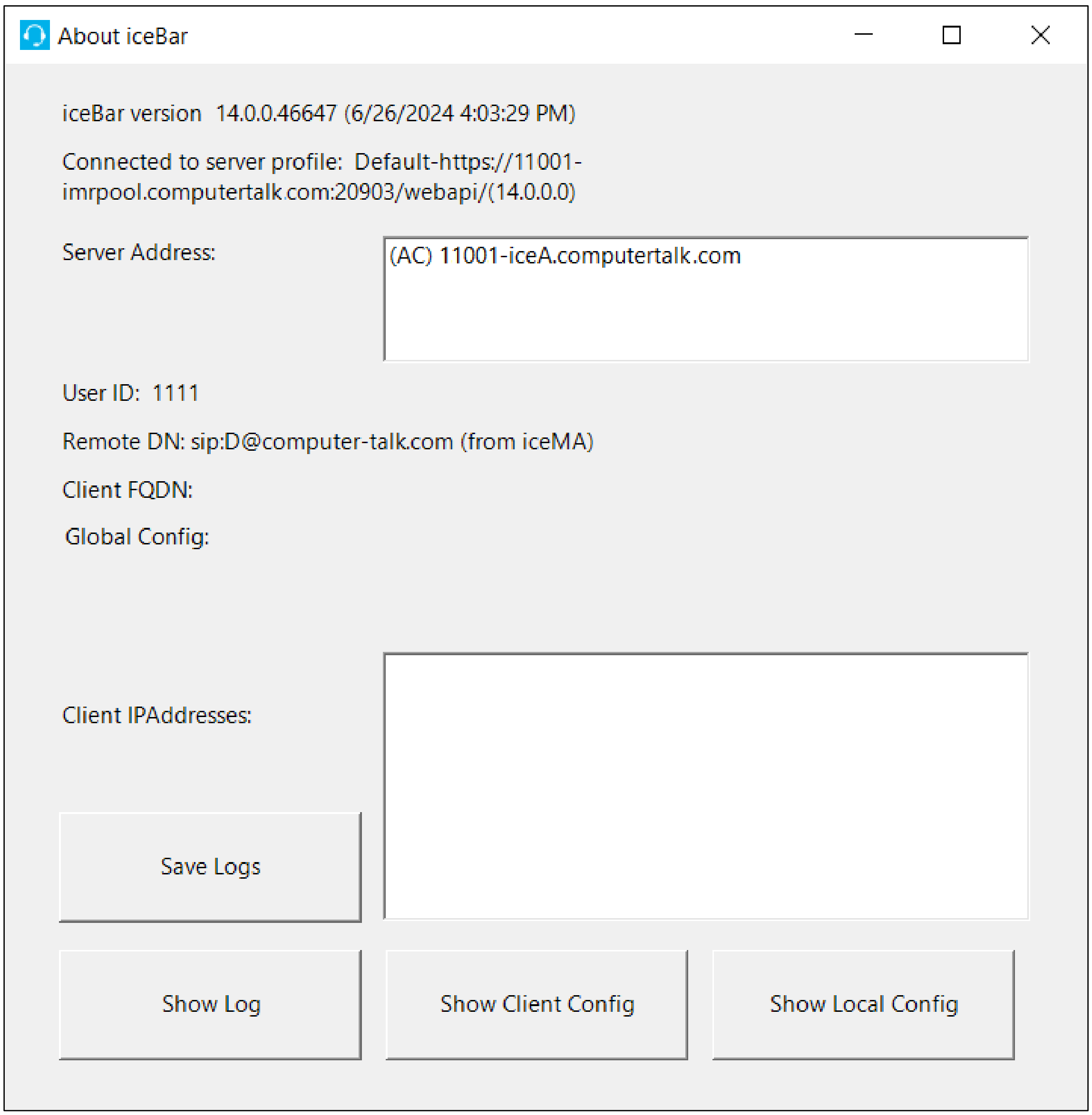
Note:

- You can enable the editing of the User Data field by selecting the Enable User Data checkbox. By default the user data field cannot be modified. By selecting the checkbox, you can make notes in the User Data field while handling a contact.
- If you decide that you would like a little extra space in the Contact Details panel, you have the option to hide the contact icon by selecting the Hide contact icon checkbox.
- Similar to the above note, if you decide you would like a little extra space in the User Functions panel, you have the option to hide the user icon by selecting the Hide user icon checkbox.

About iceBar

The About iceBar dialog box displays information on the iceBar version, profile, User ID, and Client IP address(es). The iceBar version is useful for troubleshooting and other technical support efforts.

This dialog box also provides options to configure iceBar client configuration.



Caution: Modifying client configuration is an advanced topic. Please contact your ice administrator if your client configuration requires changes.

Setting Thresholds

Color thresholds can be set for every statistic on the States and Statistics panel. When the Warning Threshold is met, the field turns yellow, and when the Critical Threshold is met, the field turns red (the default colors can be modified as described in this section).

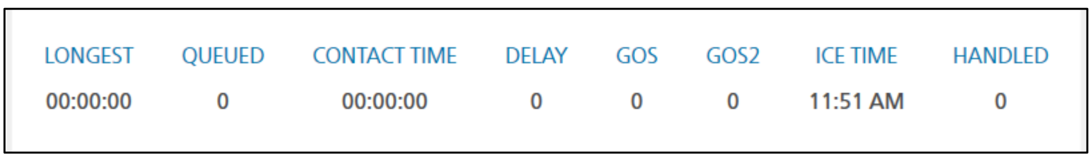
Consider the following examples of thresholds in use:

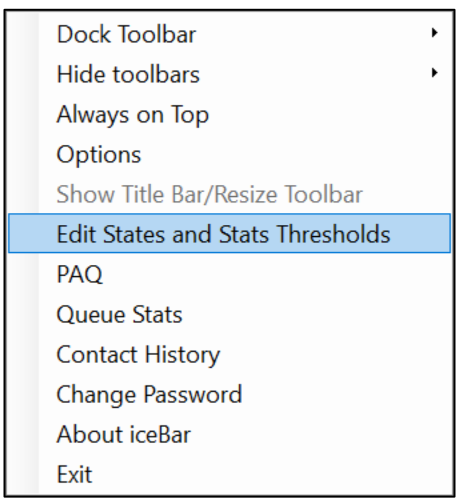
1. Thresholds can provide a visual alert when a high number of contacts are waiting in the queue. For example, the 'Queued' field can be set to turn yellow when five contacts are waiting in the queue and turn red when ten contacts are waiting in the queue.

Thresholds can provide a visual alert when the Grade of Service falls below specified percentages. For example, the 'GOS' field can be set to turn yellow when the statistic reaches 79% and turn red when the statistic reaches 69%.

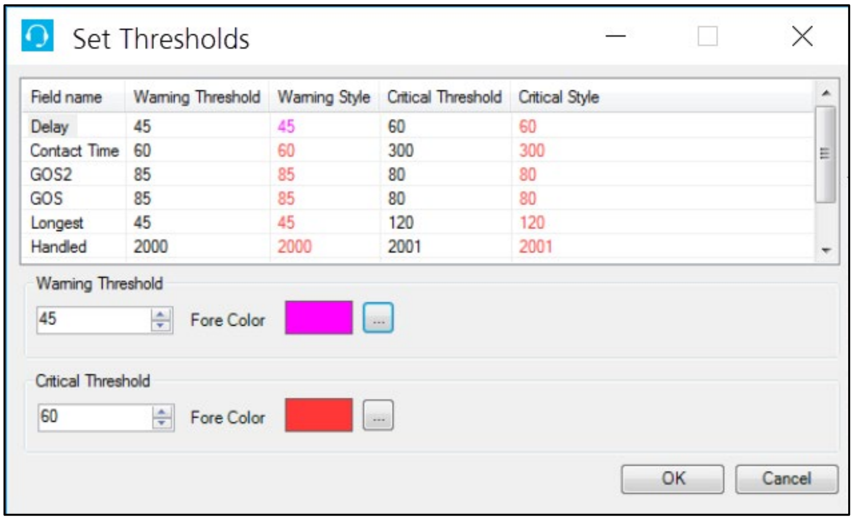
To configure the thresholds for statistics:

1. Right-click the States and Statistics toolbar and choose 'Edit States and Stats Thresholds' from the menu that appears.





2. The 'Set Thresholds' dialog box appears.



3. To change the Warning Threshold or Critical Threshold, select an appropriate number from the related spin box.

   For some statistics, the Critical Threshold must be higher than the Warning Threshold. For those statistics, you are able to select values that fall within the current permissible range.

4. Click *OK* to save your changes or proceed to step 5 to change the color of your thresholds.

5. Select the ‘Fore Color’ ellipsis button (...) to change the color of the text for Warning Threshold and Critical Threshold.

   The ‘Color’ dialog box appears.

6. Select a color from the choices offered or click ‘Define Custom Colors’ and define the color you wish to use from the palette provided.

7. Click *OK* to close this dialog box.

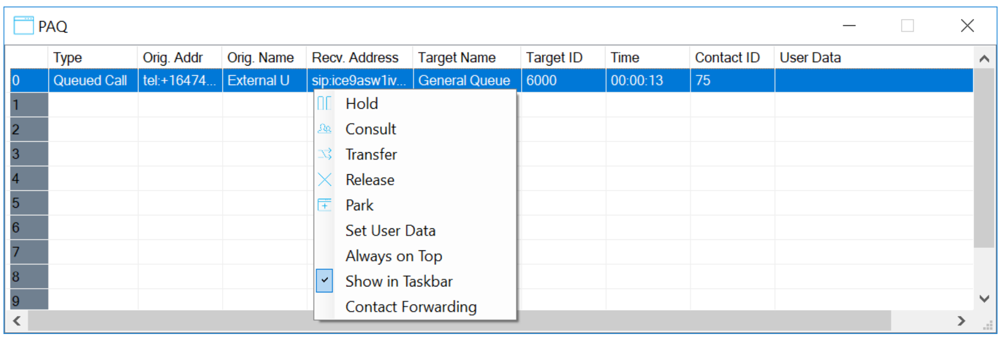
   You can also click *Cancel* to close the dialog box without applying your changes.

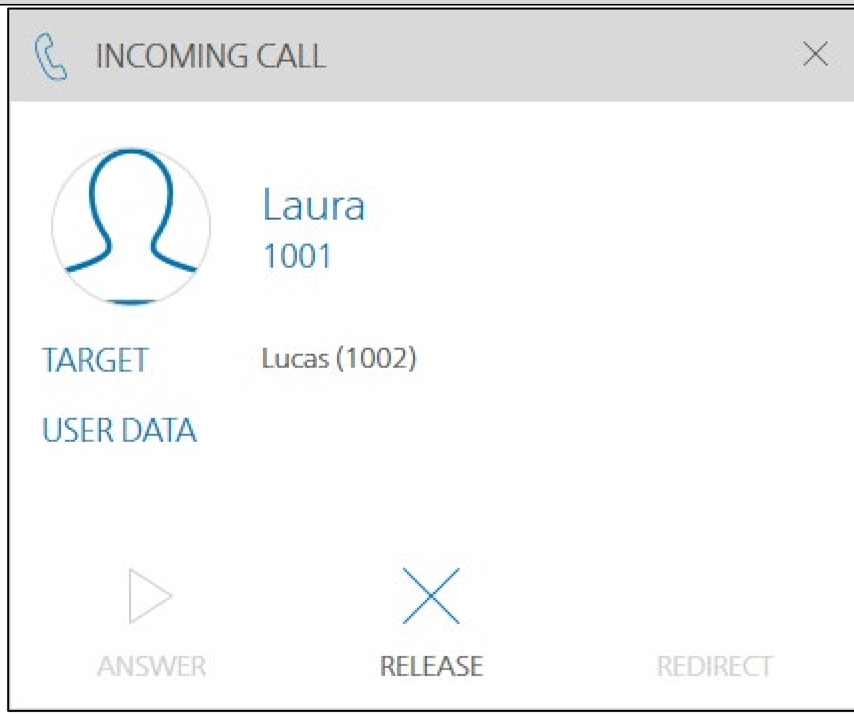
8. Click *OK* on the ‘Set Thresholds’ dialog box to save your changes.

Notifications

Understanding Notifications

iceBar allows the user to configure how they are alerted when a contact is presented to their workstation. Notification options include:

Notification Options	
Option	**Description**
"Popping" the PAQ	The Personal Access Queue window opens when the contact is presented. 
Show Toast Window	A Toast Window containing caller/contact information opens when the contact is presented.

Notification Options	
Option	**Description**
	
Play Sound	A .wav file that you specify alerts you that the contact is presented.
Flash Form Icon in Taskbar	The iceBar quick text form icon flashes to alert you when you have received a quick text.

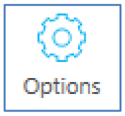
A user may wish to be notified in different ways for different types of contacts. Consider these different types of contacts and examples of how notifications might be customized for each:

Notifications with different types of contacts	
Type of contact	**Example**
PAQ	A contact enters your Personal Access Queue. iceBar can play a .wav file called “inpaq.wav” and pop your PAQ in this situation.

Notifications with different types of contacts	
Type of contact	**Example**
Call	A queued call is presented to your workstation. iceBar can play "ringing.wav" and present a toast window in this situation.
IM	An instant message is presented to your workstation. iceBar can play a sound once to alert you. **Note:** If a user is configured to use icePhone, iceBar can play a sound once to alert you when an instant message is received at your workstation.
Auto Dial	A voicemail in the queue or an outbound campaign contact is presented to your workstation. iceBar can play a sound to alert you and simultaneously pop up a toast window.
Email	An email is presented to your workstation. iceBar can play a sound to alert you and simultaneously pop up a toast window.
Quick Text	A quick text is presented to your workstation. iceBar can play a sound and flash the icon in the taskbar or pop your quick text form.
Multi Contact	The auto pop of the PAQ window is configurable for a user with the multi-contact handling COS enabled. This setting determines if the PAQ window opens for each additional contact received after the first. **Note:** To configure the PAQ window settings for the first contact a user receives, refer to the PAQ notification above. If "Pop PAQ" is selected, your PAQ window will open when you are presented with an additional contact. If "None" is selected, your PAQ will not open when you are presented with an additional contact. The "Pop PAQ" notification mode is the default setting.

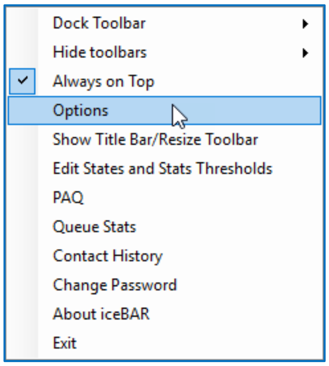
Configuring Notifications

To set notification options for PAQ, Call, IM, Auto Dial, Email, or Multi Contact:

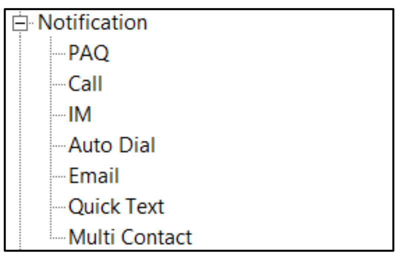


Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

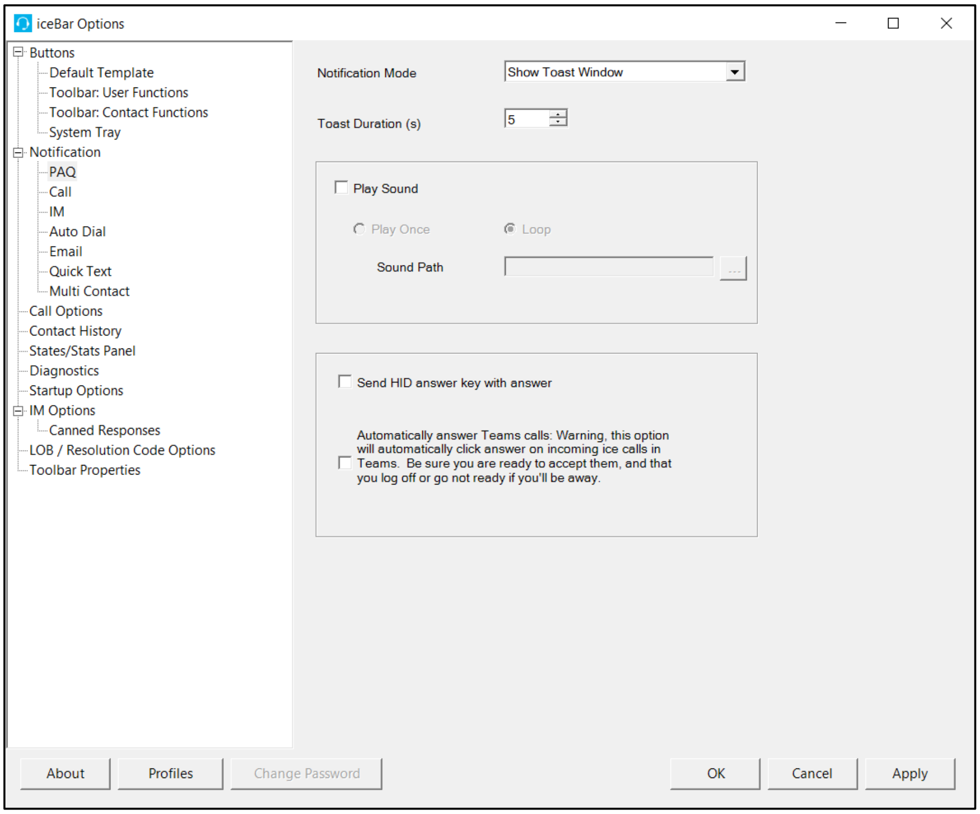
1. Right-click any blank space on the iceBar.
2. A menu appears.



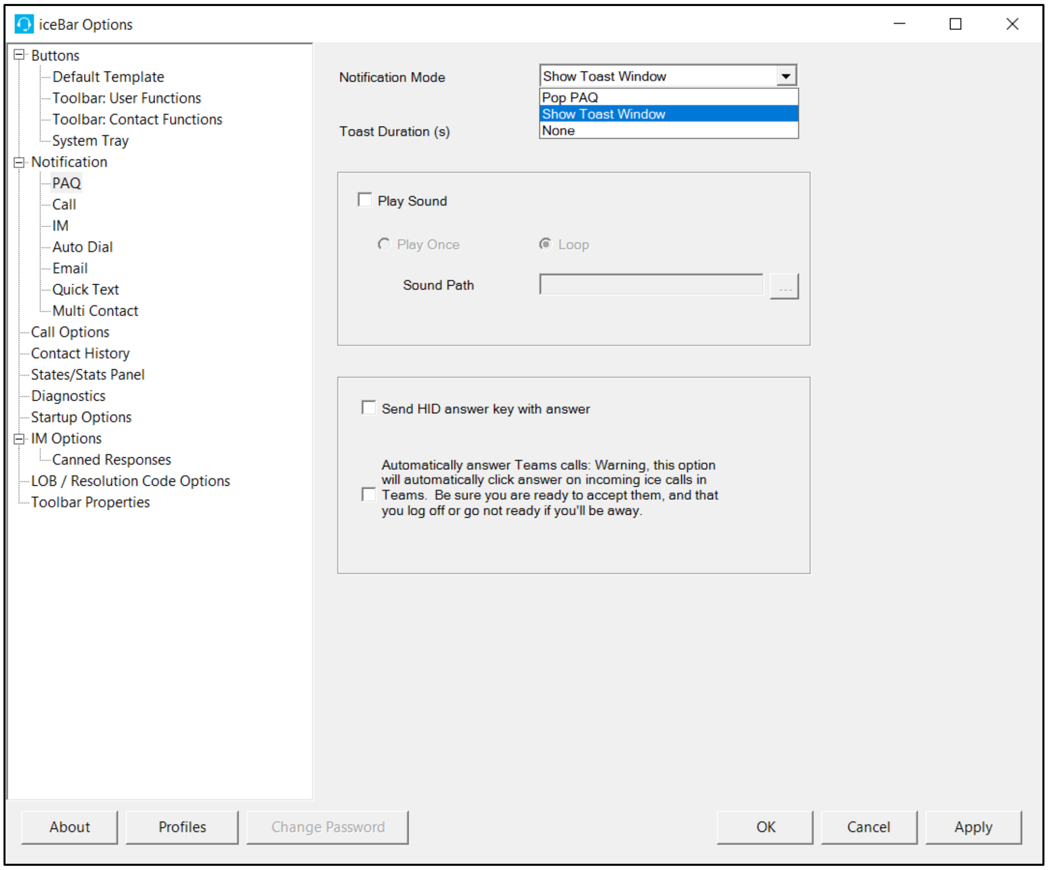
3. Select ‘Options’.
4. The iceBar Options menu appears.
5. Expand Notification from the tree view by either double-clicking on ‘Notification’, or by single clicking the ‘+’ beside ‘Notification.’
6. The tree view expands to show the different contact types for which you can configure notifications.



7. Select the contact type for which you would like to configure notifications. The selected dialog box opens on the right.



8. Select one of the three Notification Modes for this contact type from the drop-down list: Pop PAQ, Show Toast Window, or None.

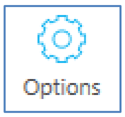


9. If you selected Show Toast Window, select the Toast Duration from the spin box located below the dropdown list. The Toast Duration refers to the length of time the toast window appears on the screen. The default is 5 seconds.
10. Select the 'Play Sound' checkbox to associate an audio file with this type of contact. Select either 'Play Once' or 'Loop' if you wish for the audio file to repeat.
11. Enter the path of the audio file you wish to use in the 'Sound Path' field or navigate to the location of the audio file using the ellipsis button.
12. The *Send HID answer key with answer* option allows users to answer incoming ice calls in Teams using the iceBar answer key as the call is alerting. When this option is enabled, users do not need to answer the Teams call to first in order to set themselves off-hook. They can answer directly from the iceBar *answer* button. **Note:** The user must not be set to auto answer as the answer button will be disabled.
13. The *Automatically answer Teams calls* option allows iceBar to automatically answer incoming ice calls in Teams. When this is enabled, users will not need to answer the Teams call first in order set themselves off-hook. iceBar will automatically answer the incoming call and connect the user to the call. Users must be ready to accept the call

and remember to set themselves to the not ready state if they are unavailable to answer.

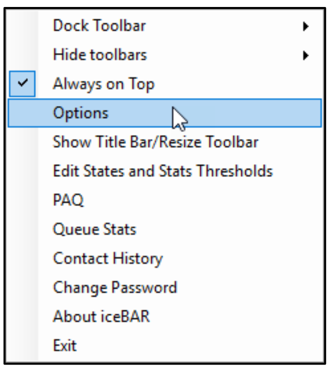
14. Click *Apply* to save your settings and click *OK* to close the dialog box.

<u>To set notification options for Quick Text:</u>

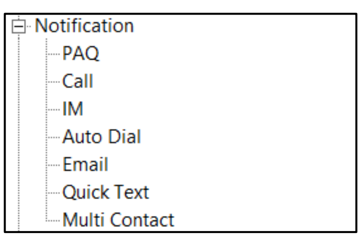


Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

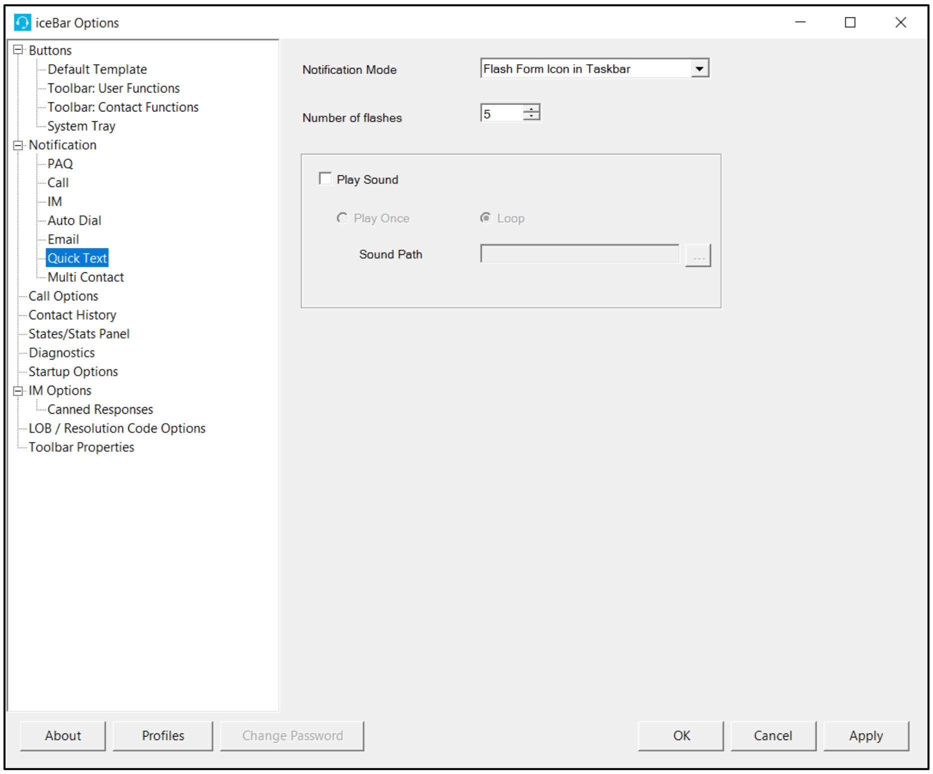
1. Right-click any blank space on the iceBar.
2. A menu appears.



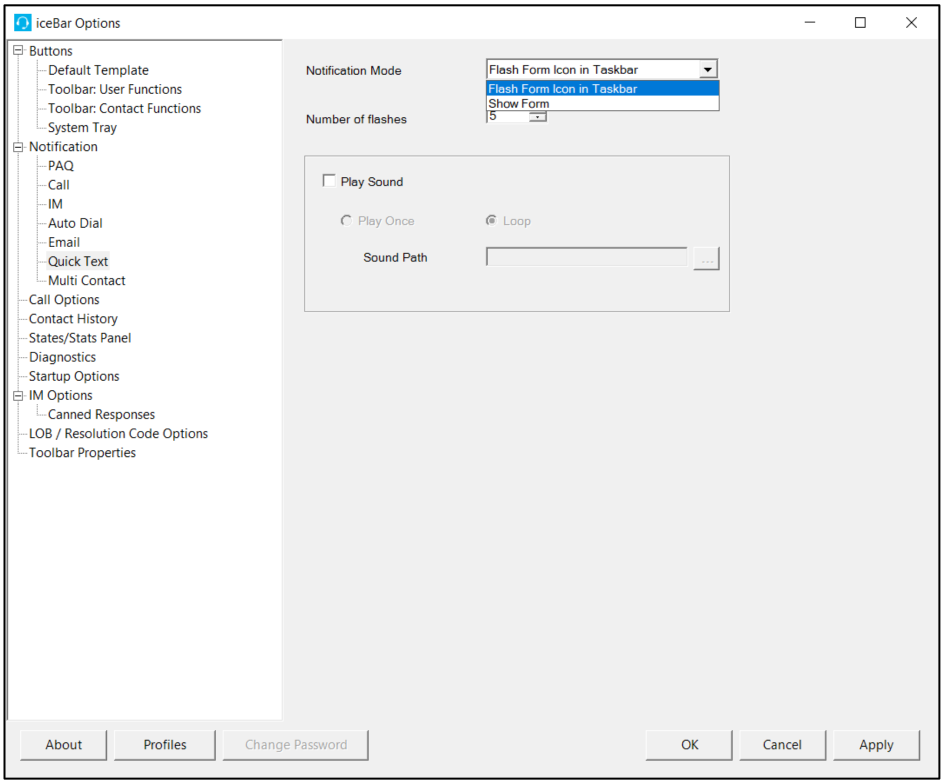
3. Select ‘Options’.
4. The iceBar Options menu appears.
5. Expand Notification from the tree view by either double-clicking on ‘Notification’, or by single clicking the ‘+’ beside ‘Notification.’
6. The tree view expands to show the different contact types for which you can configure notifications.



7. Select Quick Text. The dialog box opens on the right.



8. Select one of the two Notification Modes for this contact type from the drop-down list: Flash Form Icon in Taskbar or Show Form.



9. Select the Number of Flashes from the spin box located below the dropdown list. The Number of Flashes refers to the number of times that the chosen notification method flashes on the screen. The default is 5 flashes.
10. Select the 'Play Sound' checkbox to associate an audio file with this type of contact. Select either 'Play Once' or 'Loop' if you wish for the audio file to repeat.
11. Enter the path of the audio file you wish to use in the 'Sound Path' field or navigate to the location of the audio file using the ellipsis button.
12. Click *Apply* to save your settings and click *OK* to close the dialog box.

Call Options

Understanding Call Options

Dial History Depth:

iceBar stores the most recent numbers a user has dialed. When a user begins to key in a phone number to place a call, iceBar fills in the number if it is in the dial history. A user can also use the dropdown menu to look at the most recently dialed numbers. By default, the system stores the last 100 numbers. A user may configure the Dial History Depth to include more or fewer dialed numbers. The section that follows provides information on configuring this option.

PAQ Rows:

iceBar's PAQ Window displays a number of rows for contacts. The default setting is 10 rows. A user can configure the PAQ to display more or fewer rows. The section that follows provides information on configuring this option. For more information on PAQ Window, refer to Chapter 4: Personal Access Queue

Call Forwarding Options:

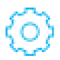
'Call Forwarding' determines how direct calls will be handled in specific situations.

In most situations, Call Forwarding settings are configured to send unanswered direct calls to a user's voicemail box. The section that follows provides information on configuring this option. You may also refer to Chapter 4: Personal Access Queue

Reach Numbers:

Users can specify destinations to which alerting calls can be redirected. Call Forwarding sends all calls automatically to a particular destination (e.g., unanswered calls in PAQ to voicemail). Reach Numbers, on the other hand, allows a user to make a decision after a call alerts at the workstation. The call can be forwarded to voicemail, a mobile device, or another number.

Configuring Call Options



Options

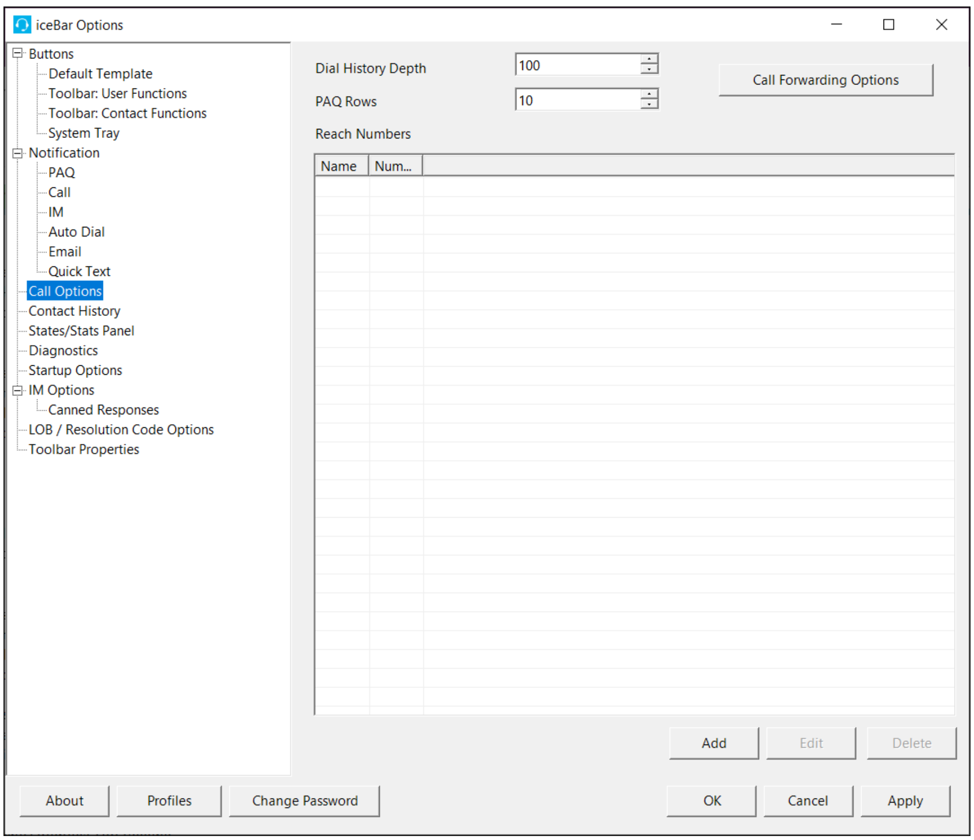
<u>To set Call Options for Dial History Depth, PAQ Rows, Call Forwarding Options and Reach Numbers:</u>

Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.

   A menu appears.
2. Select 'Options'.

   The iceBar Options menu appears.
3. Select 'Call Options' from the menu in the tree view by left clicking on it.



The right side of the window now displays some information and options.

To configure Dial History Depth:

1. Enter the desired number of contacts in the Dial History Depth spin box or use the associated up and down buttons to select the desired number.
2. Click *Apply* to enable the change. Click *OK* if you are finished making changes to your iceBar Options.

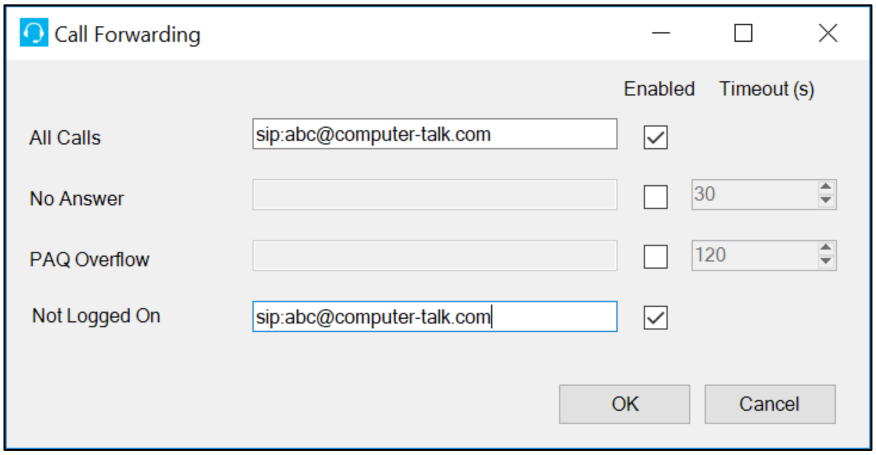
To configure PAQ Rows:

1. Enter the desired number of contacts in the PAQ Rows spin box or use the associated up and down buttons to select the desired number.
2. Click *Apply* to enable the change. Click *OK* if you are finished making changes to your iceBar Options.

To configure Call Forwarding Options:

1. Click *Call Forwarding Options.*

   A dialog box appears.



All Calls refers to all direct calls intended for this specific user. With this option enabled, calls will be immediately redirected to the specified number. Calls will not alert at the user's workstation.

No Answer refers to all direct calls that go unanswered after alerting at the user's workstation. When this option is enabled, all No Answer calls will be redirected to the specified number. The spin box allows you to specify a timeout, in seconds, to apply to this option. For example, if you specify 18 seconds, a direct call will alert for 18 seconds (3 rings) before being redirected.

PAQ Overflow refers to all direct calls that do not reach the user's PAQ because the PAQ is full. When this option is enabled, all PAQ Overflow calls will be immediately redirected to the specified number. The spin box allows you to specify a timeout, in seconds, to apply to this option. For example, if you specify 18 seconds, a direct call will alert for 18 seconds (3 rings) before being redirected.

Not Logged On refers to when a user is not logged on to iceBar. When this option is enabled, all direct calls for this user will be redirected to the number specified.

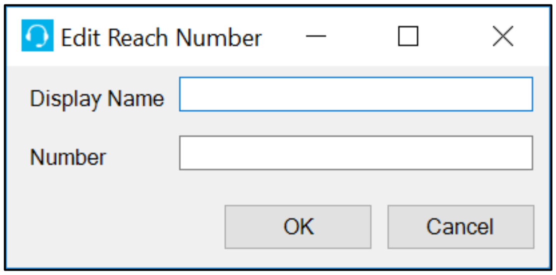
In most situations, including the above example, Call Forwarding settings are configured to send unanswered direct calls to a user's voicemail box.

It is strongly recommended that you see your ice administrator before making changes to Call Forwarding.

To configure Reach Numbers:

1. Click *Add.*

   A dialog box appears.

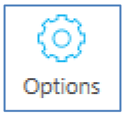


2. Enter the Display Name for the Reach Number (e.g., Mobile Phone).
3. Enter the phone number and click *OK*.
4. The reach number you added now appears in the Reach Numbers list. Click *OK* if you are finished making changes to your iceBar Options.

   For information on how to use Reach Numbers, refer to page 88.

Start-up Options

Configuring Start-up Options



Automatic Profile Selection Delay

When iceBar is launched and there are multiple profiles configured, a profile window appears, allowing the user to select a profile to use. By default, this window appears for 60 seconds before automatically selecting the profile which was last used.

To configure the Automatic Profile Selection Delay:

1. Choose the desired time delay, in seconds, from the spin box. The maximum value is 3600 seconds.
2. Click *Apply*.
3. Click *OK*.

Note: This spin box will be unavailable if the checkbox 'Do not show profile selection form on startup' is enabled.

IM Options

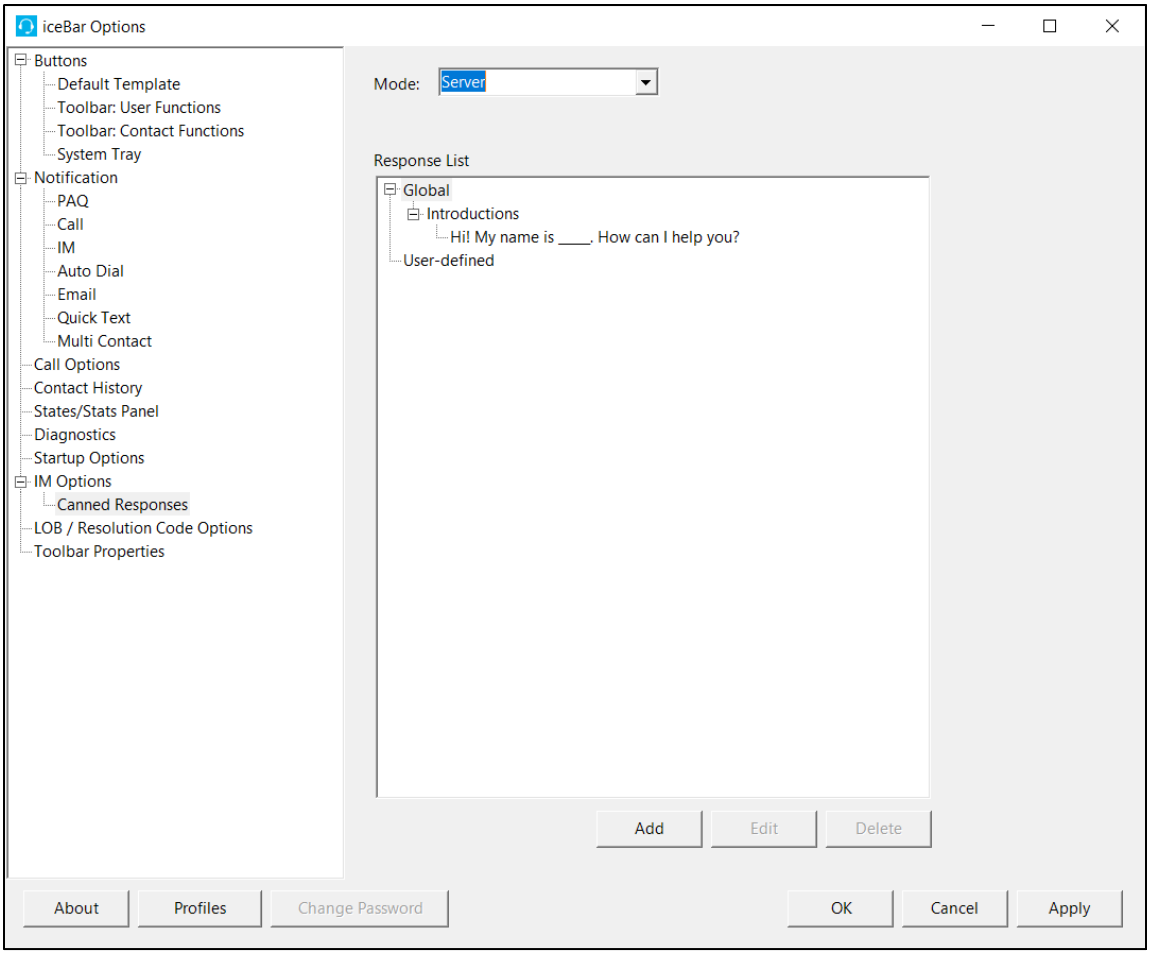
Configuring IM Canned Responses

Canned responses are predetermined responses to common questions. Users can select a canned response from a list of global and user-defined responses during an instant message conversation. Canned Responses can be configured in iceBar. For information on using Canned Responses, refer to Receiving an IM from Queue on page 233.

Users can only add, edit, and delete Canned Responses under the User-defined list.

To configure canned responses associated with their profile, users must go to iceBar Options and select Canned Responses from the left column.

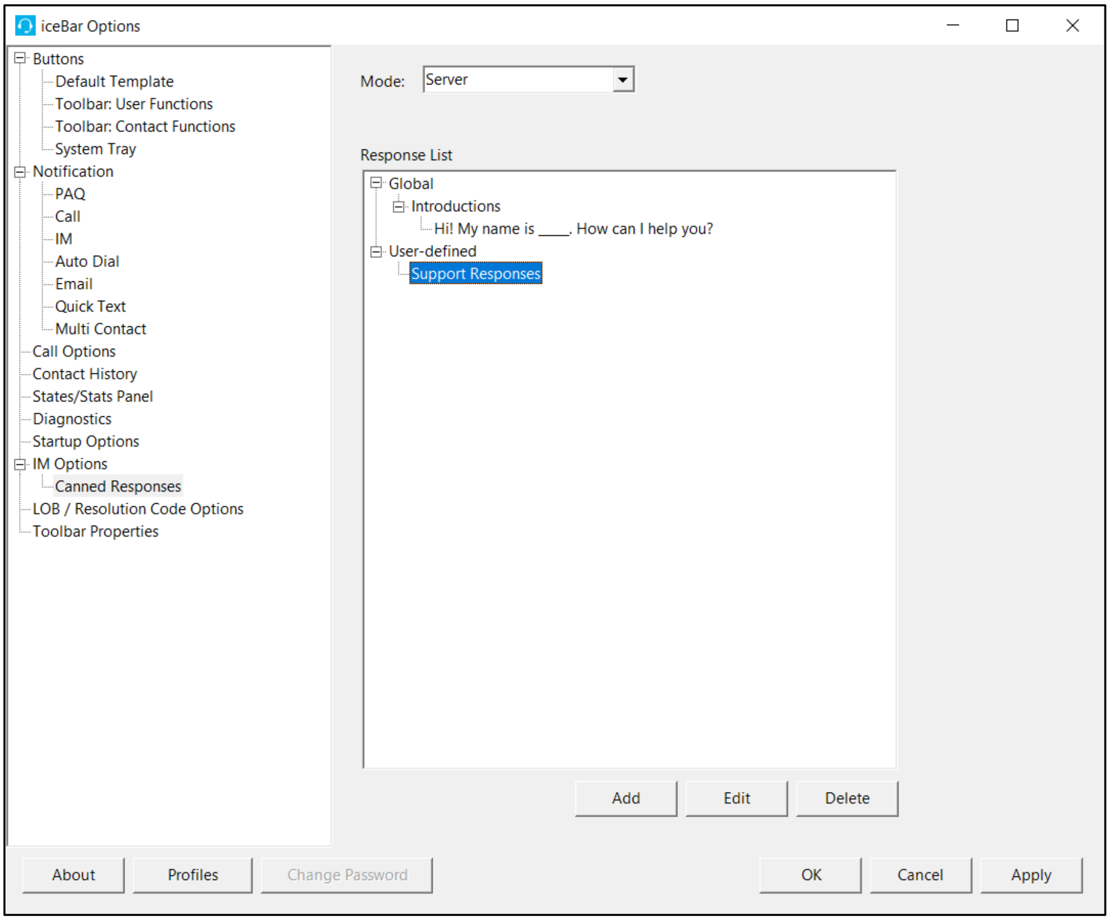
Users can make changes to items under the User-defined folder – they cannot configure Global responses. Only Administrators with access to the global configuration file for iceBar can modify, add, or delete global responses.


iceBar Options
Buttons
Default Template
Toolbar: User Functions
Toolbar: Contact Functions
System Tray
Notification
PAQ
Call
IM
Auto Dial
Email
Quick Text
Multi Contact
Call Options
Contact History
States/Stats Panel
Diagnostics
Startup Options
IM Options
Canned Responses
LOB / Resolution Code Options
Toolbar Properties
Mode:
Server
Response List
Global
Introductions
Hi! My name is ____. How can I help you?
User-defined
Add
Edit
Delete
About
Profiles
Change Password
OK
Cancel
Apply

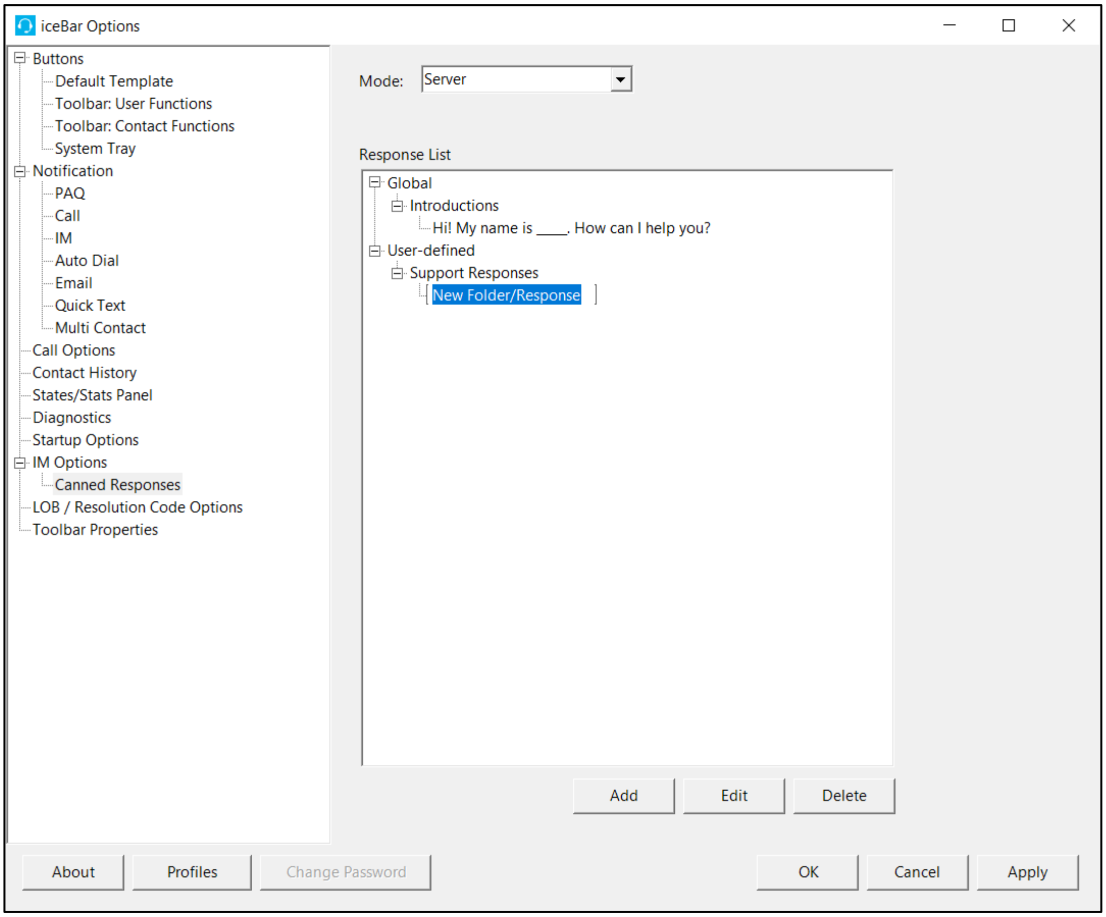
Adding, Editing, and Deleting an IM Canned Response

To add a new response:

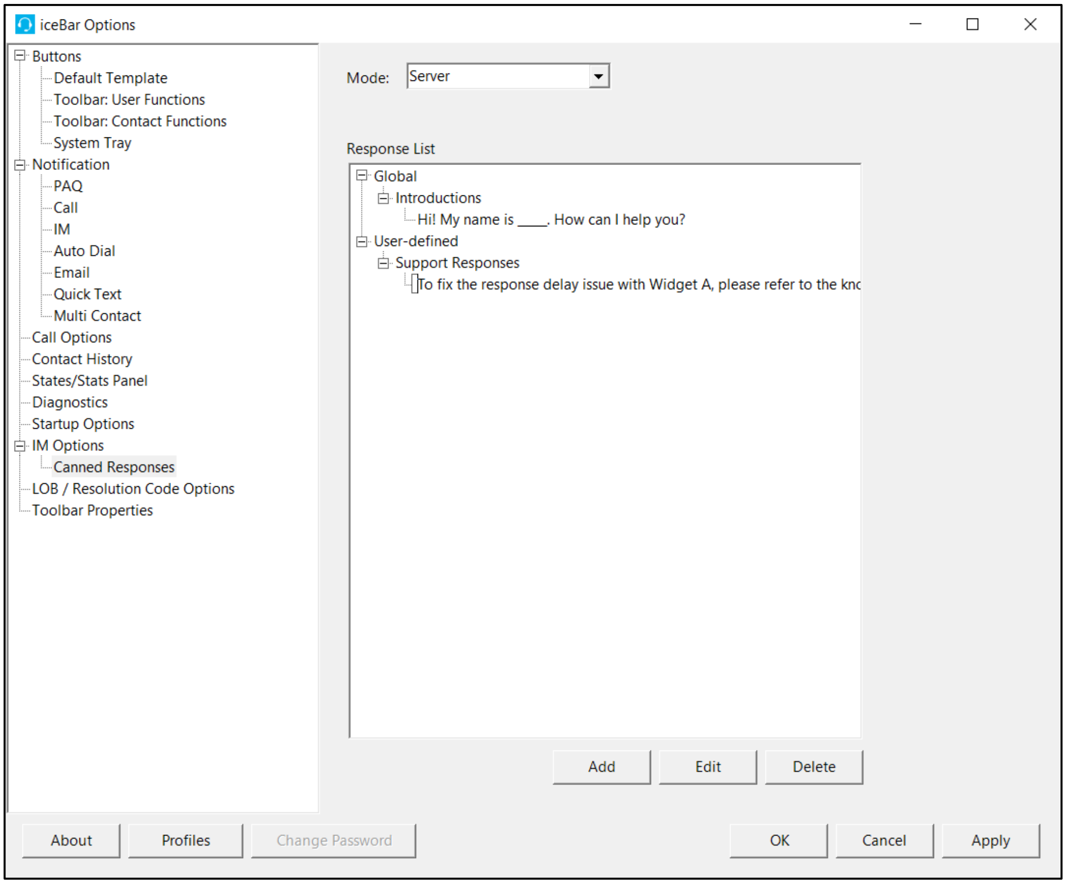
1. Highlight a file folder or a user response. In the screenshot below, Support Responses is highlighted.



2. Click Add. A new entry will appear under Support Responses, as per the screenshot below.

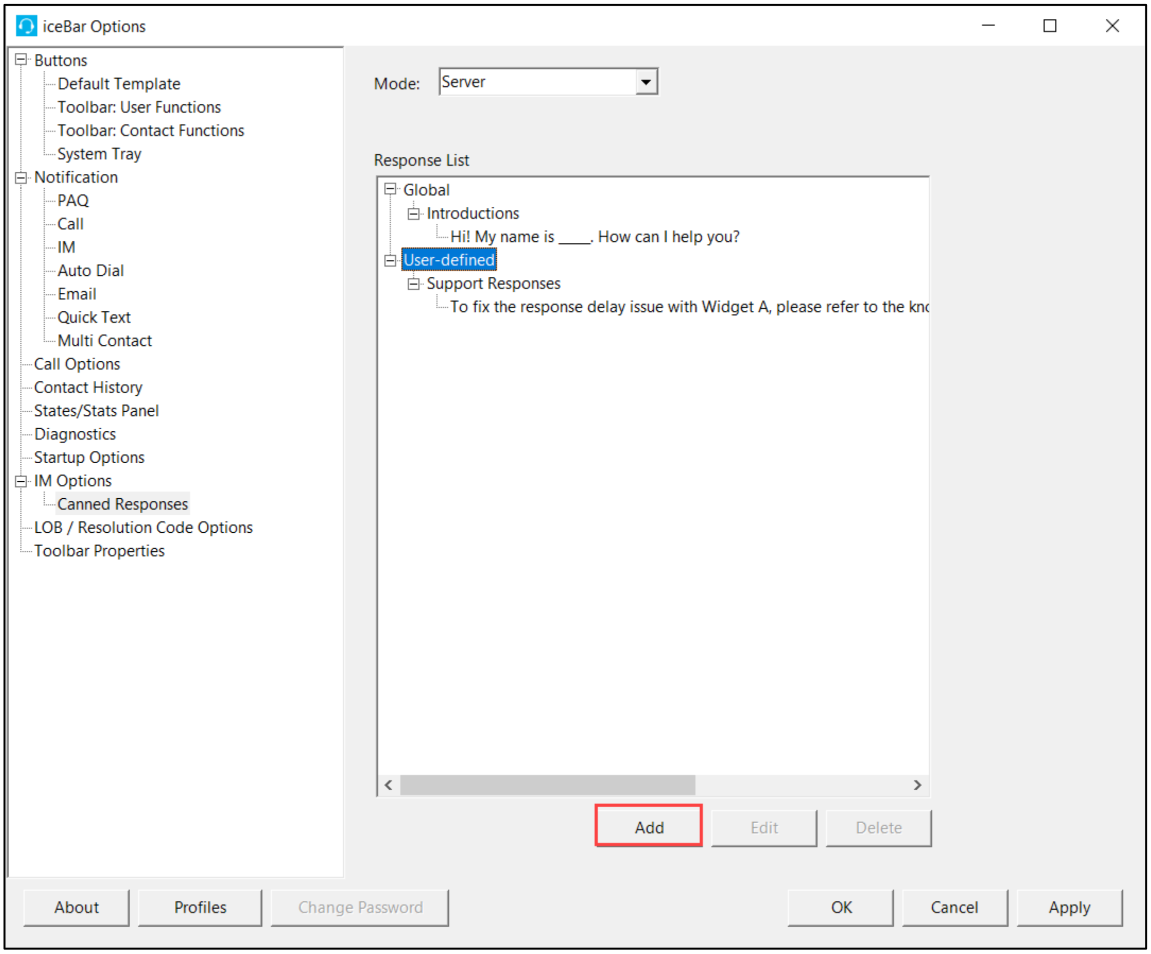


3. Replace the text with the response you want to include in the Response List. In the screenshot below, the New Folder/Response text has been replaced with “To fix the response delay issue with Widget A, please refer to the knowledge base articles located at www.WidgetIssues.com”.

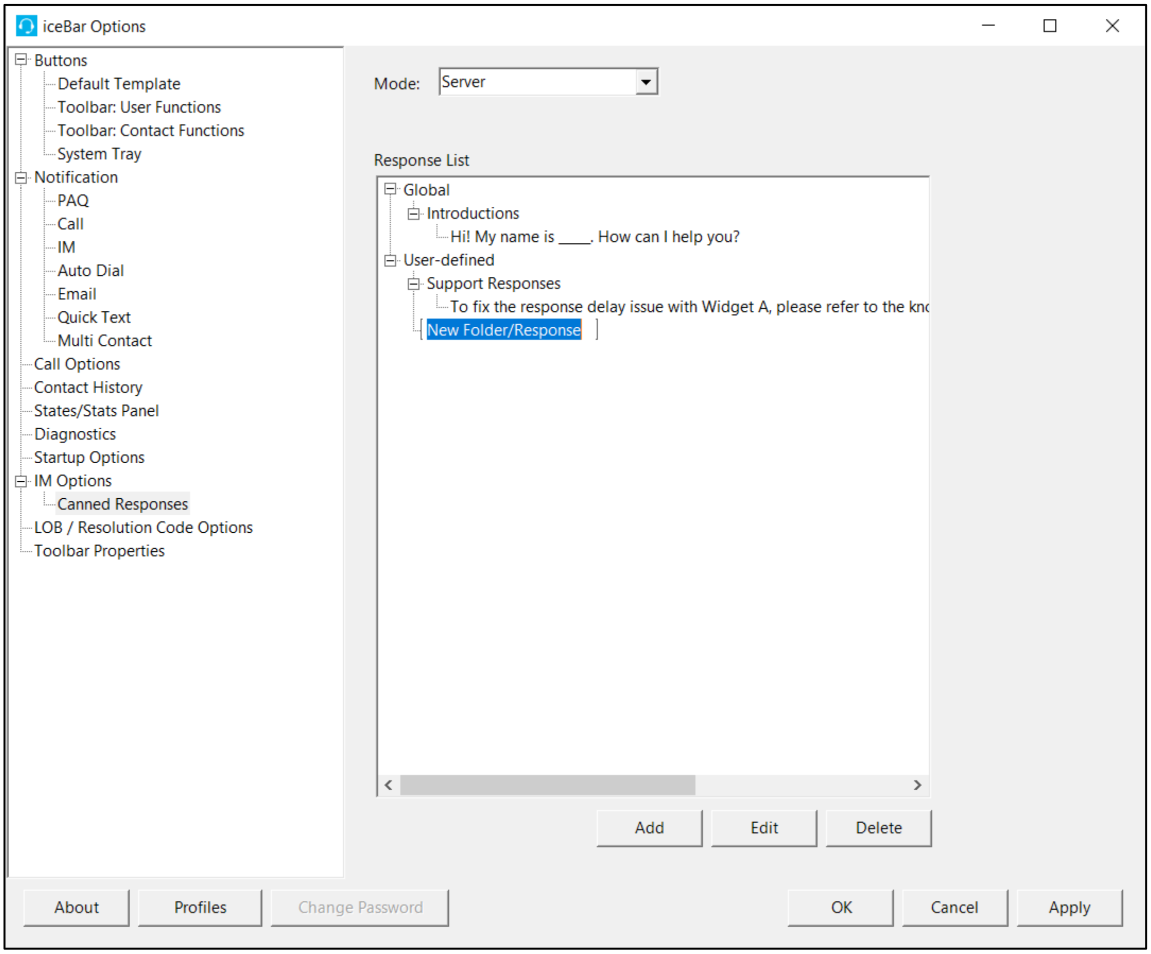


To add a new subfolder:

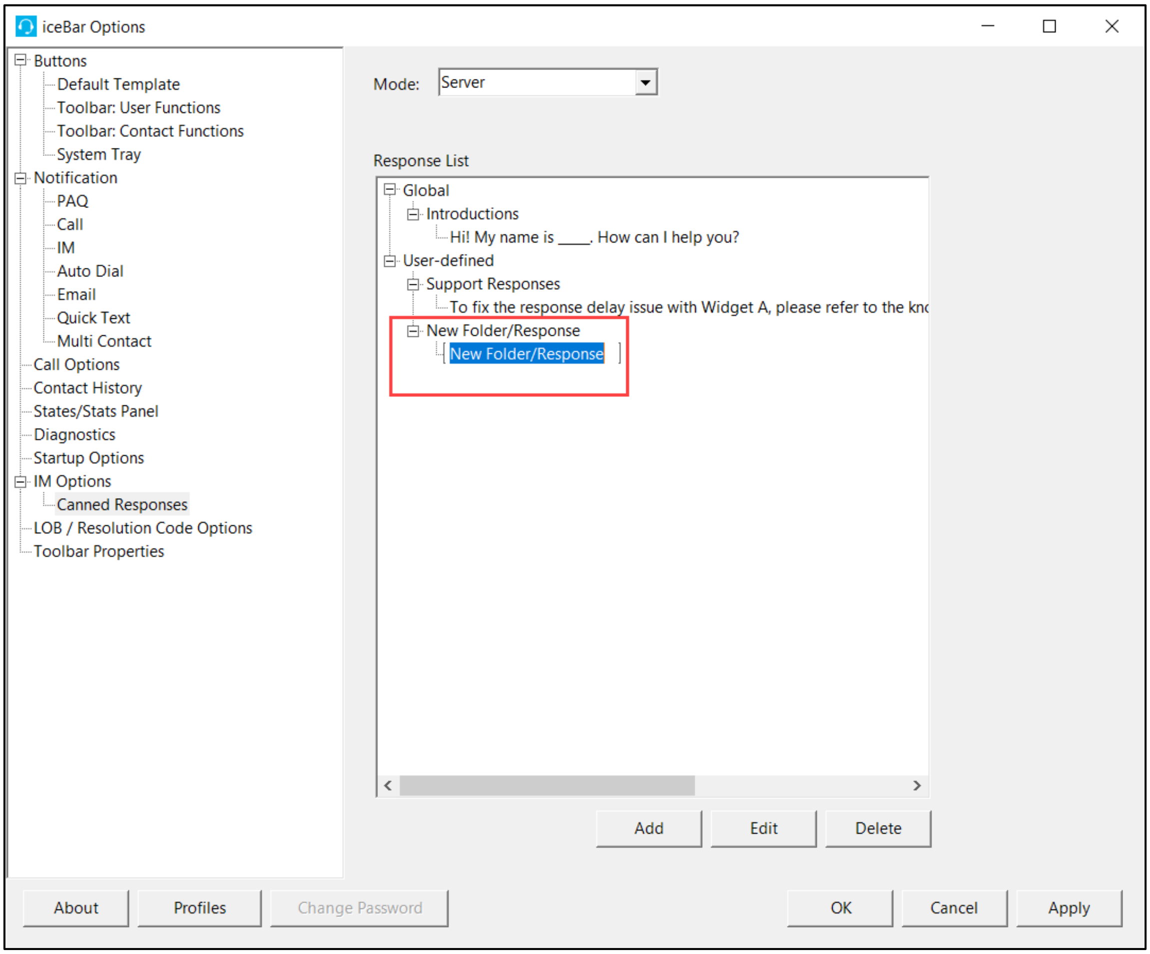
1. Highlight User-defined.



2. Click Add. A New Folder/Response textbox will appear.



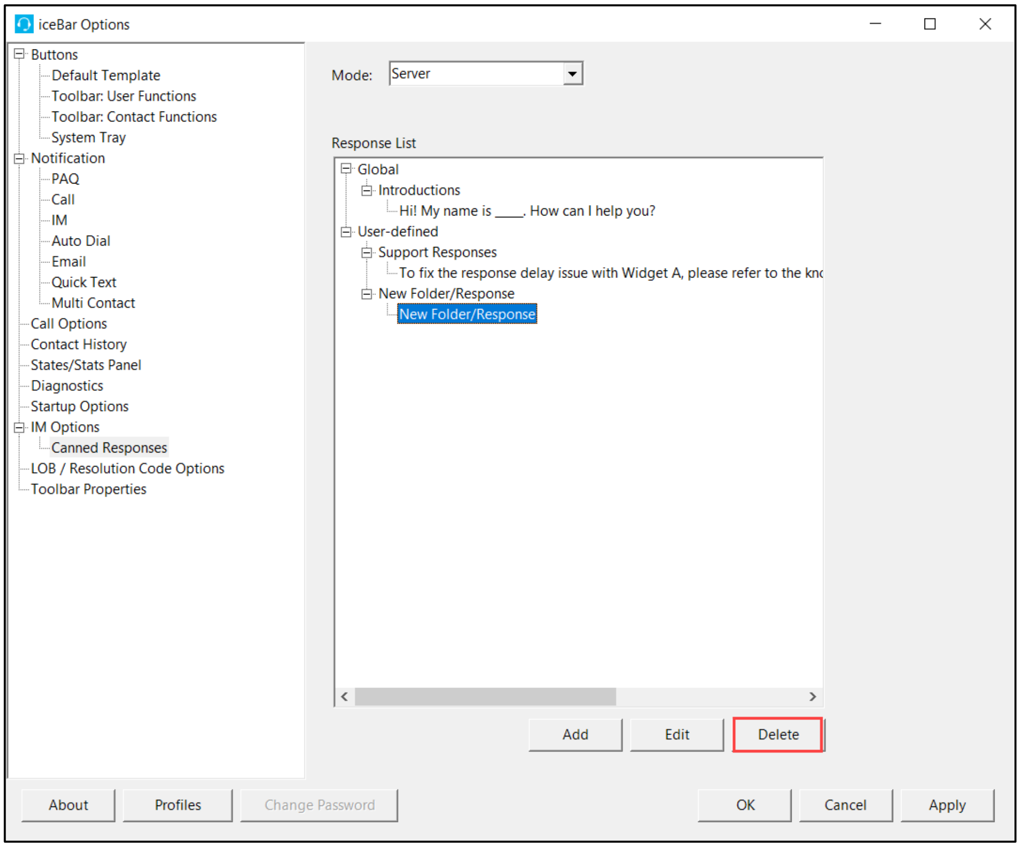
To add responses under a subfolder highlight the subfolder and click *Add*.



Note: Canned responses are sorted alphabetically.

To remove a response:

1. Highlight the file or message you want to delete.



2. Click Delete.

Note: iceBar does not show a delete confirmation message – the message will be deleted once you select Delete.

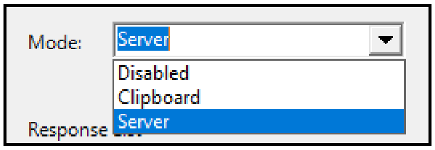
To modify an existing response, users must highlight the file they want to modify and select Edit.

Once you click *Edit*, you can modify the message directly in the details view.

Once you close and re-open the iceBar Options window, the responses will appear in alphabetical order.

Selecting a mode

Canned responses have a few modes to select from. Each option provides a different way for a user to send the canned response to the chat window.



The following table describes each option that is available:

Mode	Description
Disabled	Disable the canned response feature.
Clipboard	To use this option, follow these steps: 1. Select the response from the Canned Response window. 2. Click the Copy button to copy the response to your workstations clipboard. 3. Manually paste the response into the chat window.
Server	To use this option, follow these steps: 1. Select the tab at the top of the Canned Response window corresponding to the IM contact you wish to send a message to. 2. Select the response from the Canned Response window. 3. Click the Insert button to send the response to you're your chat window.

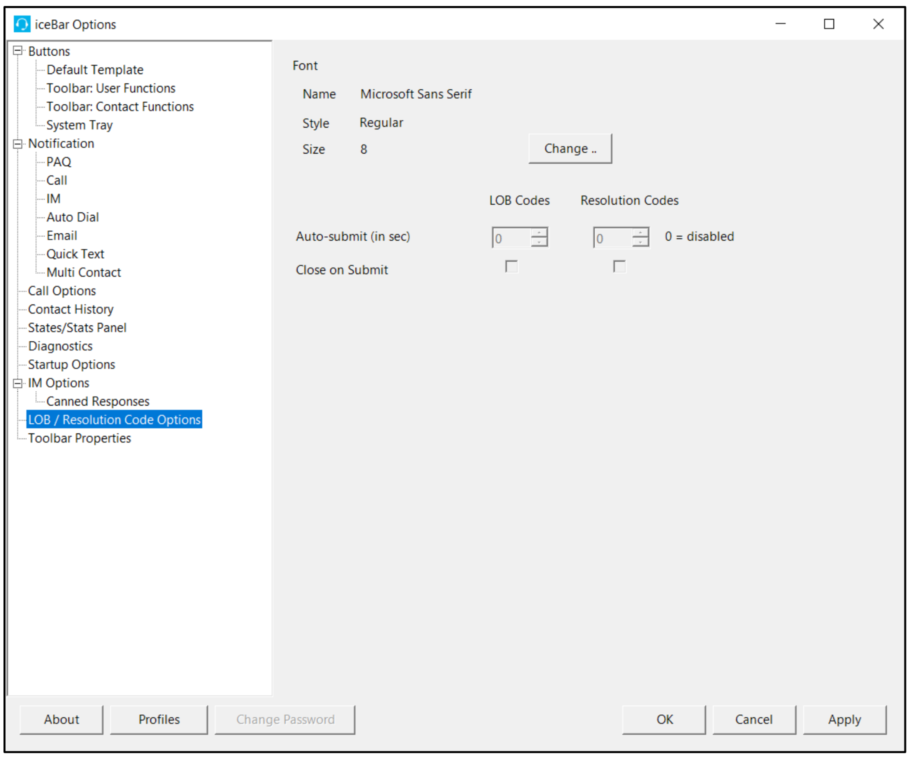
LOB/Resolution Code Options

Understanding LOB/Resolution Code Options

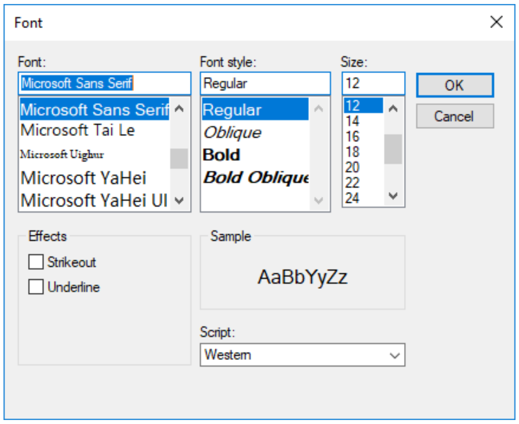
You have the ability to classify your interaction with a contact using a LOB (Line of Business) and Resolution Code. For more information on when and how to use LOBs see page 277, and for Resolution Codes see page 220.

Configuring the Font for LOB/Resolution Codes

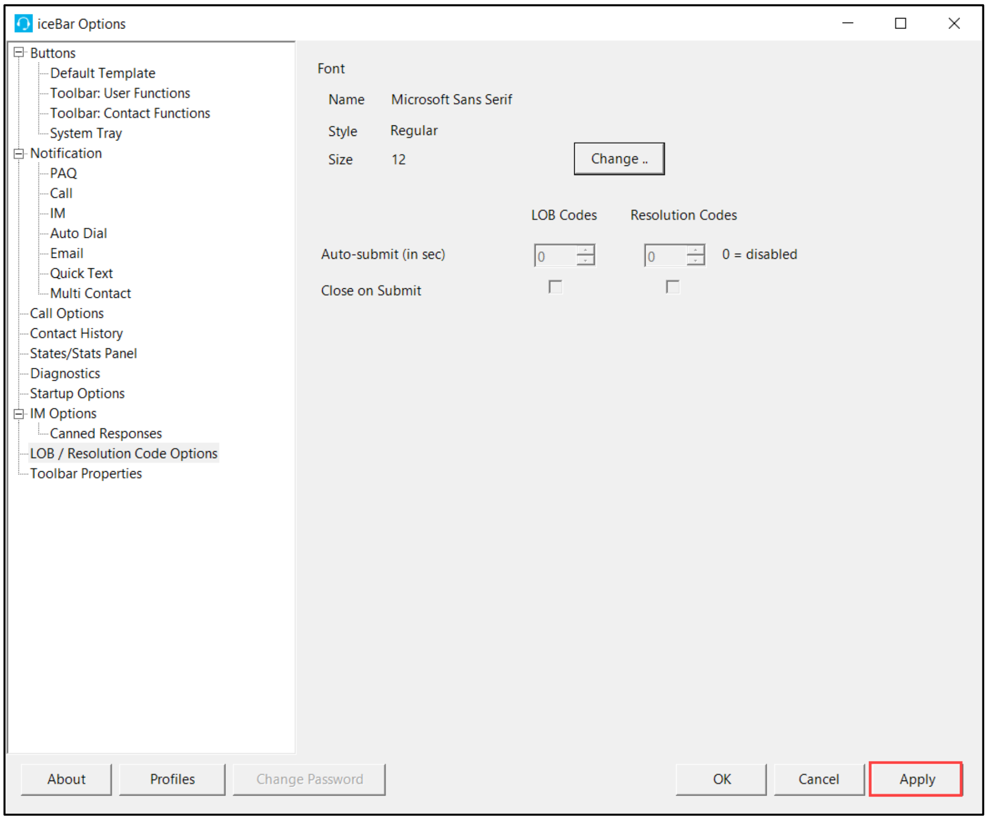
1. Right-click any blank space on the iceBar.
2. Select *Options*.
3. Select *LOB/Resolution Code Options* from the menu in the tree view by left clicking on it.



4. Select *Change* and the pop-up below appears.



5. Select 'OK' when finished.
6. Select 'Apply' to save your changes.



Configuring the Submit Time

You have the ability to limit the time a user has to select a LOB and/or Resolution. The timer is in seconds. When the time limit is reached the selected option will be submitted. If nothing is selected…

Selecting ‘0’ disables this feature.

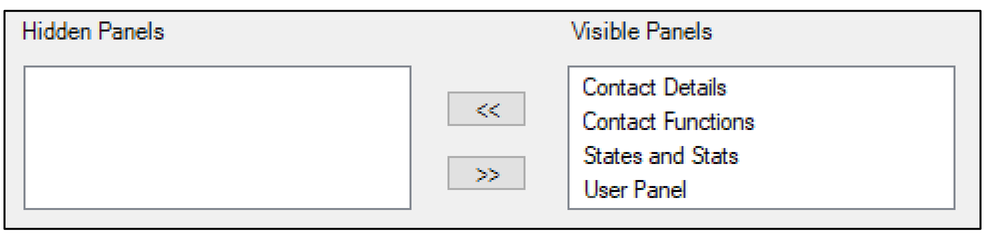
Selecting ‘Close on Submit’ will force the LOB and/or Resolution window to close once a code is submitted.

Toolbar Properties

The iceBar toolbar can be customized to each user’s preference. User’s can decide what panels to display, how the buttons are presented, and what details to show when a contact is presented.

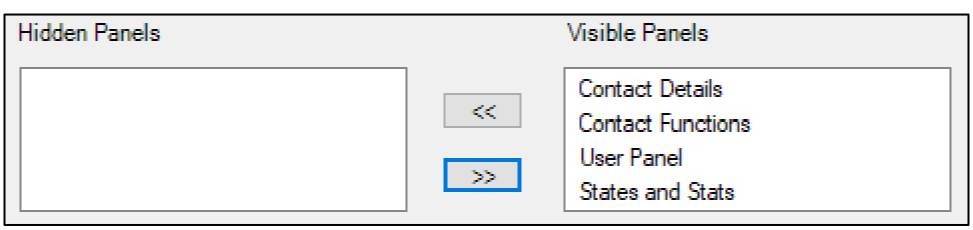
Panels

The following is used to determine which panels are visible on the toolbar and in what order they will appear.



To show a panel:

1. Click the panel in the left column.
2. Select the  button to move the panel to the right column.

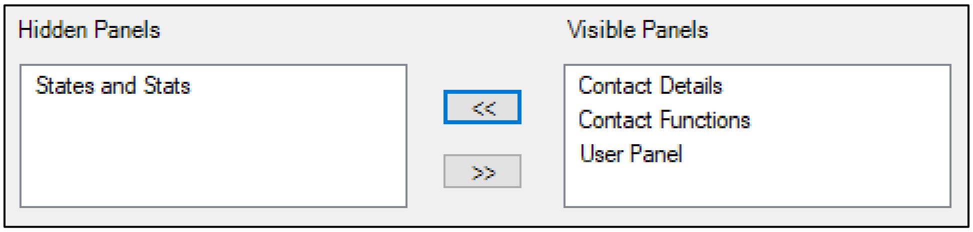


3. Click *Apply*.

This will add the panel to the toolbar.

To hide a panel:

1. Click the panel in the right column.
2. Select the << button to move the panel to the left column.



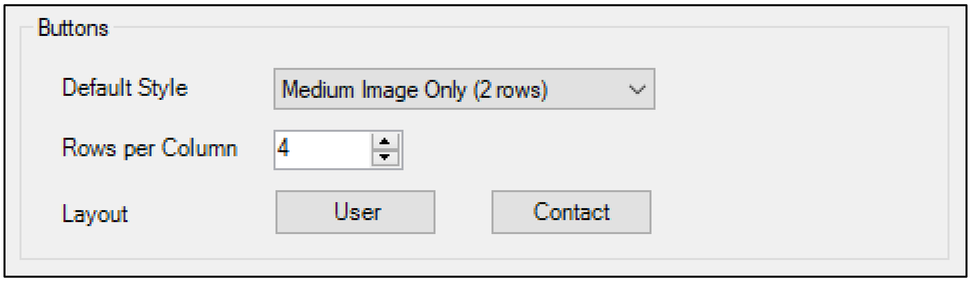
3. Click *Apply*.

This will remove the panel from the toolbar.

To select the order in which the panels will be displayed on the toolbar, click and drag the panels in the right column. The order listed top to bottom will be displayed on the toolbar left to right.

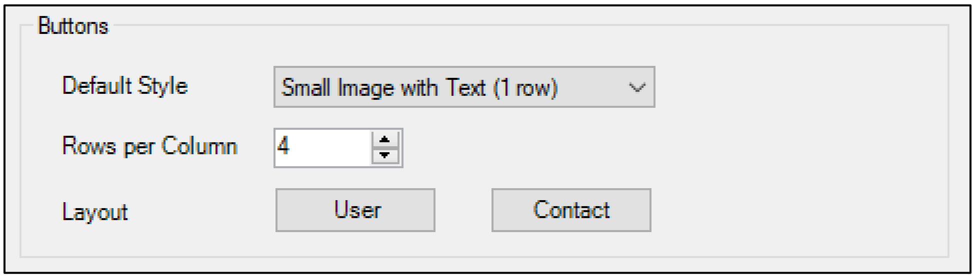
Buttons

The Buttons section allows the user to customize how the buttons are displayed. The user can decide to show Image Only or Image with Text. This along with the size (i.e., Small, Medium, or Large) dictate how many rows are required for each button.



Based on the Default Style selected, the Rows per Column field determines how many buttons will be displayed per column. The image above shows the Default Style to be Medium Image Only (2 rows), which means each button requires 2 rows. Since the Rows per Column is set to 4, the toolbar will show 2 buttons per column. An example of this is as follows:

Another example:



In the image above, the Default Style selected is Small Image with Text (1 row). This means each button requires 1 row to display the image and text. The Rows per Column is set to 4. Based on the two settings, 4 buttons per column should be displayed on the toolbar. This will look as follows:

To customize individual buttons, refer to the Customize Buttons section on page 58.

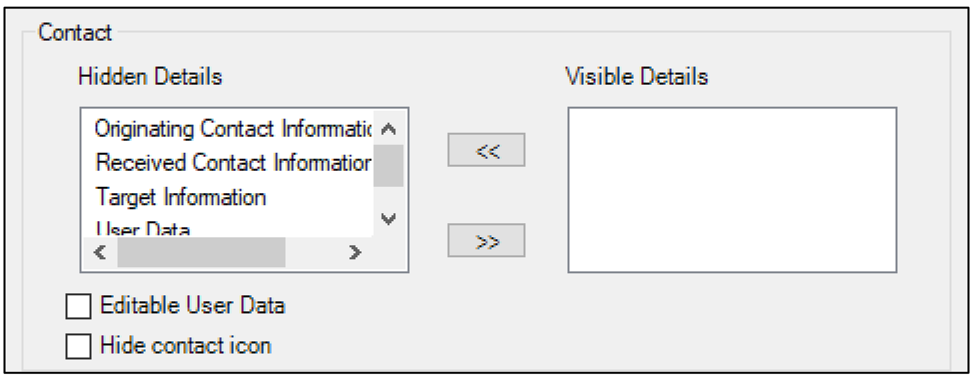
The Layout buttons (i.e., User and Contact) direct you to the Buttons section in the tree view. Specifically, the *User* button directs you to Toolbar: User Functions, and the *Contact* button directs you to Toolbar: Contact Functions. These properties allow the user to decide what buttons they want displayed in User Functions under the User Panel, and what buttons they want displayed on the Contact Functions Panel. For more information on buttons available for the toolbar, see the Toolbar Options section on page 38.

Contact

This section allows the user to customize the details presented in the Contact Details Panel. The user has to option to display or hide the following:

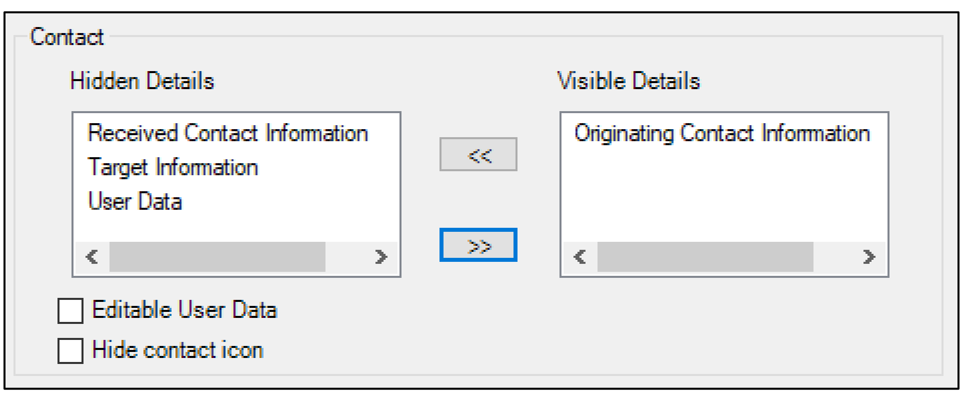
1. Originating Contact Information
2. Received Contact Information
3. Target Information
4. User Data

The following is used to determine which items will appear in the panel and in what order they will appear.



To show a particular contact detail:

1. Click the detail item in the left column.
2. Select the >> button to move the item to the right column

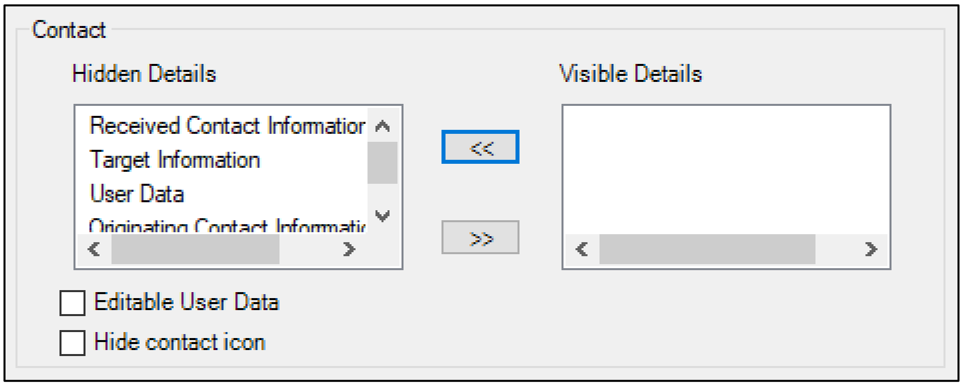


3. Click Apply.

This will add the detail to the panel.

To hide a particular contact detail:

1. Click the detail item in the right column.
2. Select the  button to move the item to the left column.



3. Click Apply.

This will remove the detail item from the panel.

By default the User Data field is locked down. Users can make this field editable by selecting the checkbox next to ‘Editable User Data’. This allows the user to make changes to the User Data field.

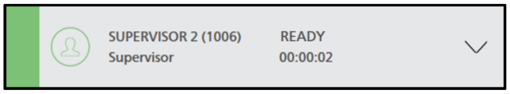
The Contact Details Panel contains a default icon. With this icon, the Contact Details Panel looks as follows:

Users can choose to hide this icon by selecting the checkbox next to ‘Hide contact icon’. When the icon is hidden, the Contact Details Panel looks as follows:

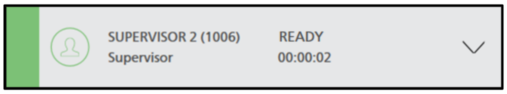
Contact Information

User

The User Panel contains a default icon. With this icon, the User Panel looks as follows:



Users can choose to hide this icon by selecting the checkbox next to 'Hide user icon'. When the icon is hidden, the User panel looks as follows:



Profiles

Understanding Profiles

Every user has at least one **server profile**. A profile contains information specific to a user's particular configuration.

A user can have multiple profiles, allowing them to work from multiple locations without reconfiguring their User ID or shutting down iceBar. Users simply select the profile they wish to use.

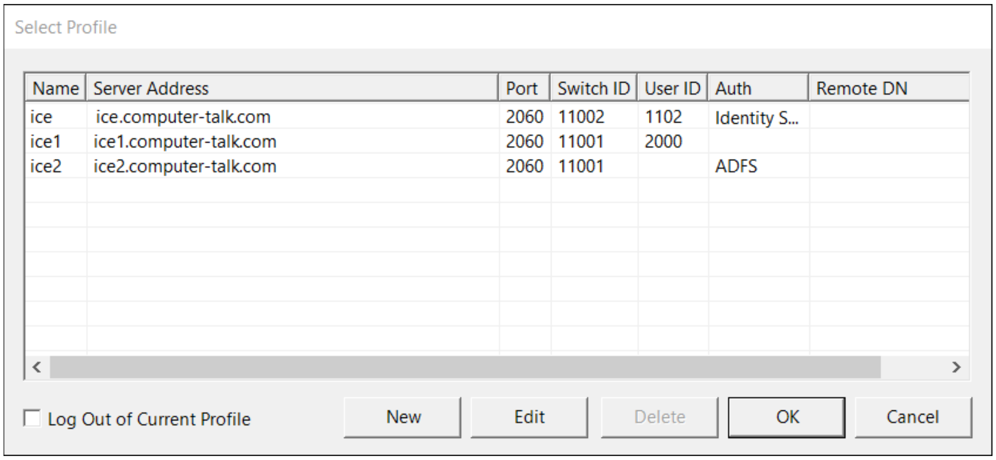
The sections that follow describe how a user can add, edit, or delete a particular profile. For information on logging on to a profile, refer to 'Logging On' on page 18.

Adding a New Profile

To add a new profile:

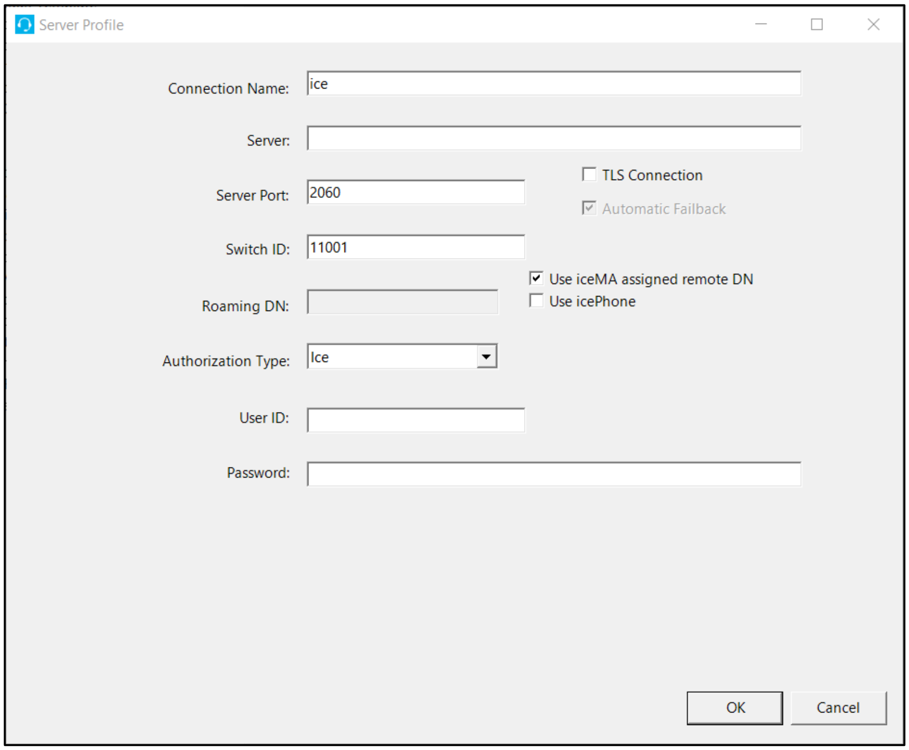
Open the Profiles window by clicking the *Profiles* button on iceBar or the System Tray Menu, depending on your configured options. For more information, refer to page 111.

1. The Select Profile dialog box appears.



Click *New*.

The Server Profile dialog box appears.



2. Fill in the fields with the relevant information.

   The following table describes each of the fields in the Server Profile dialog box:

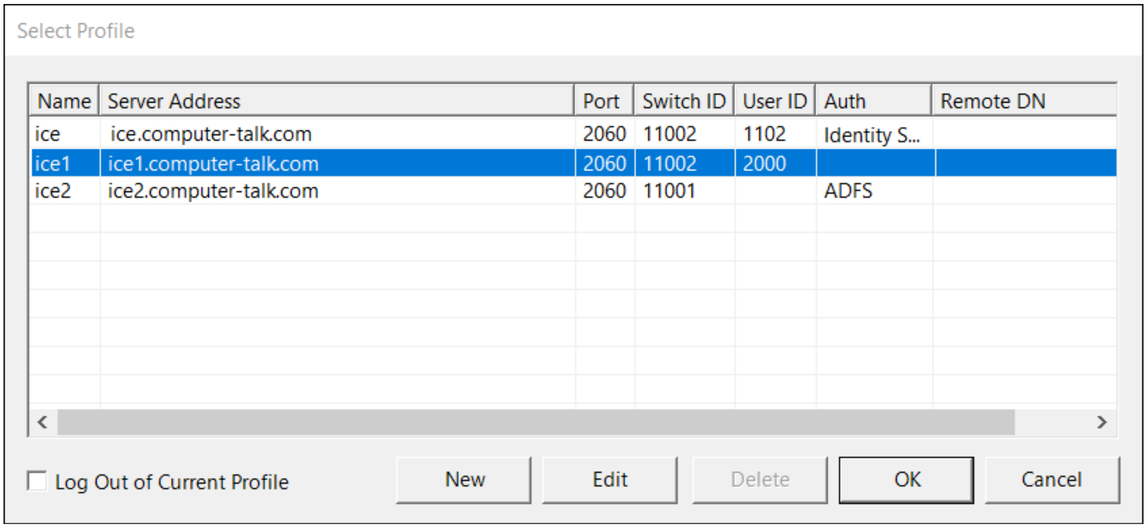
Server Profile Settings	
Field	**Description**
Connection Name	A descriptive name that a user can give to a profile.
Server	The server name or IP address associated with this profile.
Server Port	The port number associated with this profile.
Switch ID	The five-digit number representing the switch associated with this profile. For more information on switches, refer to the iceAdministrator User Manual.
User Type	User type can be local, remote, or no telephone. For a definition of each type, refer to page 3.
Roaming DN	For remote users, the Roaming DN allows the user to specify the number to which ice should send the user's contacts. To use this feature: In the Roaming DN field, enter the number where the user should be called. The DN can be a Microsoft Teams SIP address (e.g., sip:liamGerbert@widgets.ca). A user's Roaming DN can be set in iceAdministrator or iceBar. Select the 'Use iceMA assigned remote DN/Address' checkbox to use the Roaming DN that is set in the iceAdministrator profile. For more information, refer to the iceAdministrator User Manual. Select the 'Use iceBar assigned roaming DN/Address' checkbox to use the Roaming DN that is configured for your workstation. **Note**: for this option, your iceBar configuration will require your workstation (computer) details. If the user's "User Connectivity Changeable From iceBar" in the iceManager settings is set to Disable, the "Roaming DN", "Use iceMA assigned remote DN" and "Use icePhone" fields will also be disabled. The "Default User Connectivity" will override what is in the local configuration.

Server Profile Settings	
Field	**Description**
Authorization Type:	Three options are provided for logging into iceBar. 1. Ice: allows you to use your ice assigned User ID and password. 2. ADFS: Allows you to use Active Directory to log in to iceBar. This is an option provided to users who have single sign-on configured on their system. Selecting this option will display other fields for you to fill out. 3. Identity Server: Allows you to use Okta to log in to iceBar. This is an option provided to users who have single sign-on configured on their system. Selecting this option will display other fields for you to fill out.
User ID	The User ID associated with this ice profile.
Password	Configured by the user, a numeric password is 3 to 32 characters in length.

3. Click *OK* to add the new profile or click *Cancel* to close the window without saving the new profile.

Editing a Profile

To edit a profile, navigate to the Select Profile dialog box as described in steps 1 – 3 of ‘Adding a New Profile’ on page 111.



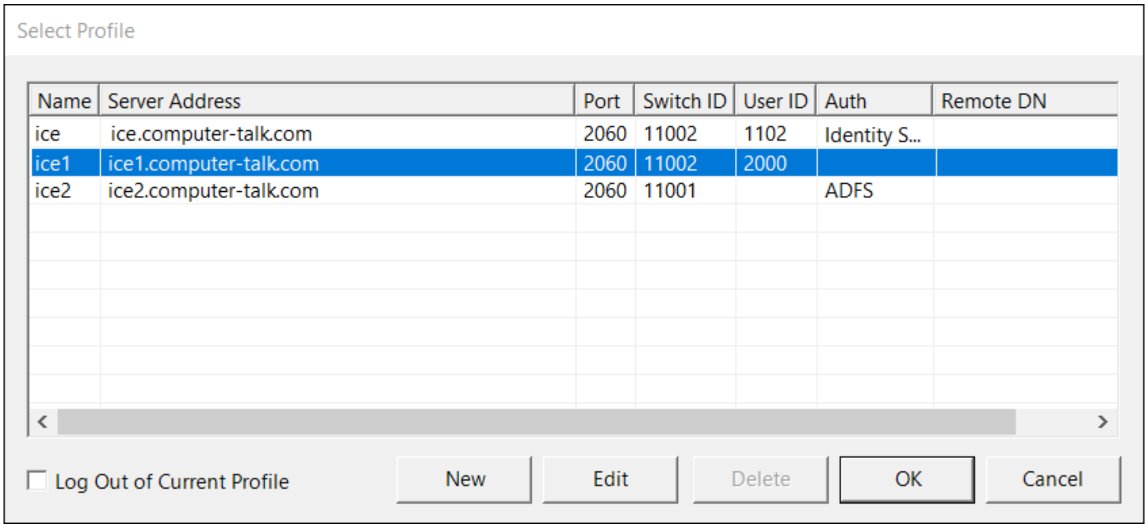
1. Highlight the profile you wish to edit by clicking on it once.
2. Click *Edit*.

   The ‘Server Profile’ dialog box appears.

   For a description of the fields, refer to the table in the previous section.
3. Edit the fields with the changes you wish to make.
4. Click *OK* to save your changes or click *Cancel* to close the window without saving the changes.

Deleting a Profile

To delete a profile, navigate to the Select Profile dialog box as described in steps 1 – 3 of ‘Adding a New Profile’ on page 111.



1. Highlight the profile you wish to delete by clicking on it once.

   Notice that the *Delete* button becomes enabled.

2. Click *Delete* to delete the selected profile.

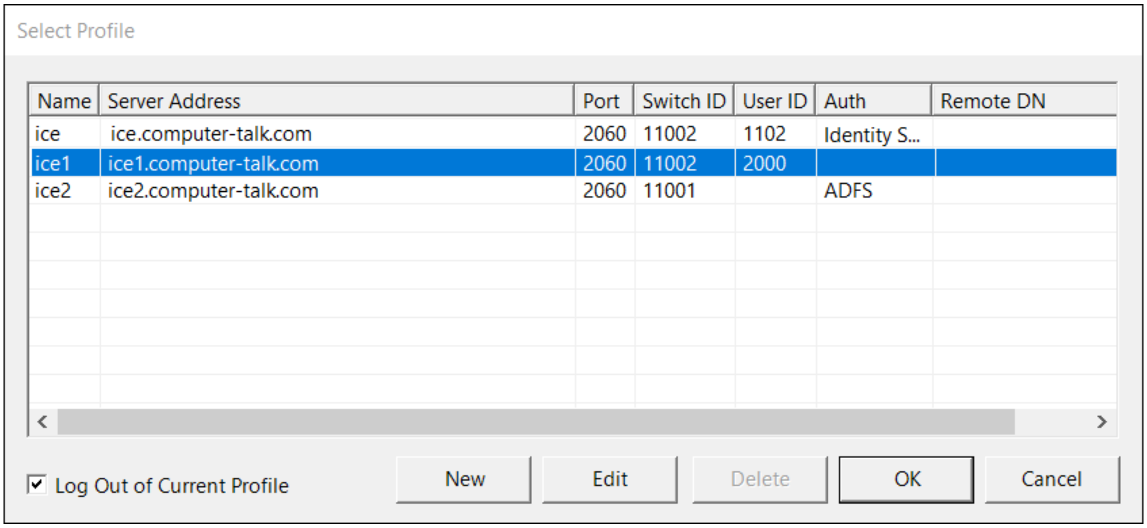
   Notice that the profile no longer appears in the list.

Switching Profiles

Sometimes it is necessary for a user to switch profiles during a shift, for example: if users need to switch workstations. They may do so without shutting down iceBar.

To switch profiles:

1. Check the box Log Out of Current Profile.



2. Highlight the profile to which you wish to log on.
3. Click *OK*.

You have now switched profiles.

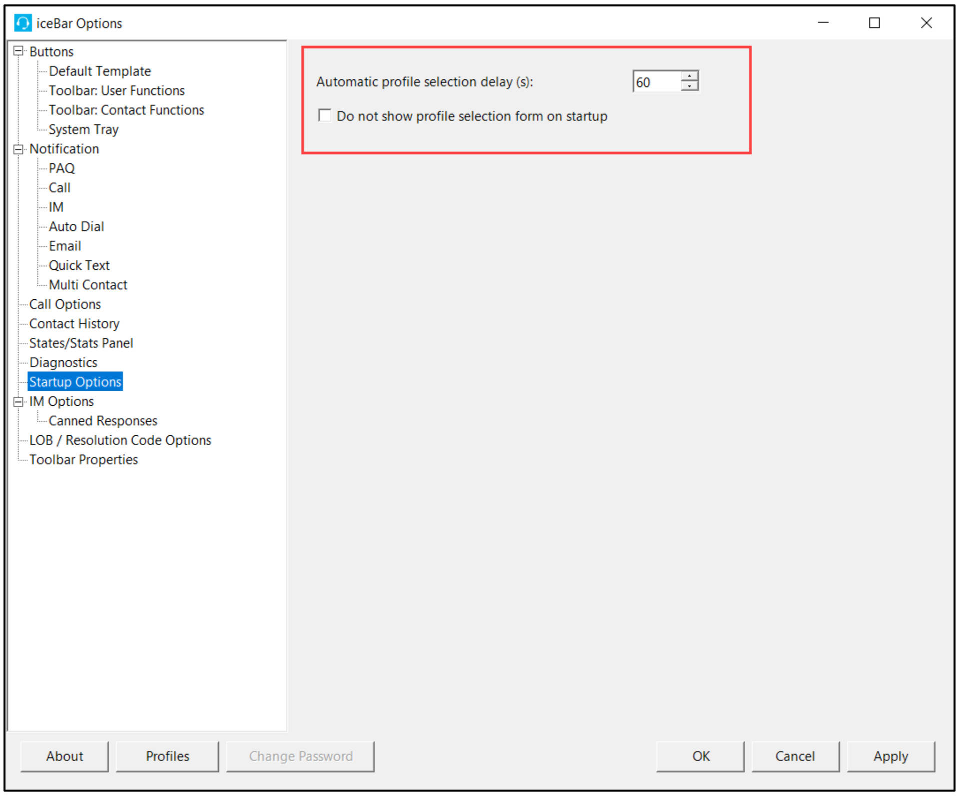
To log on to queues, proceed with the regular logon procedure. For more information, refer to Logon Procedures on page 18.

Automatic Profile Selection Delay

iceBar will automatically choose the last profile used if a profile is not selected by the user within a specified amount of time.

To configure the delay:

1. Navigate to the Startup Options menu.



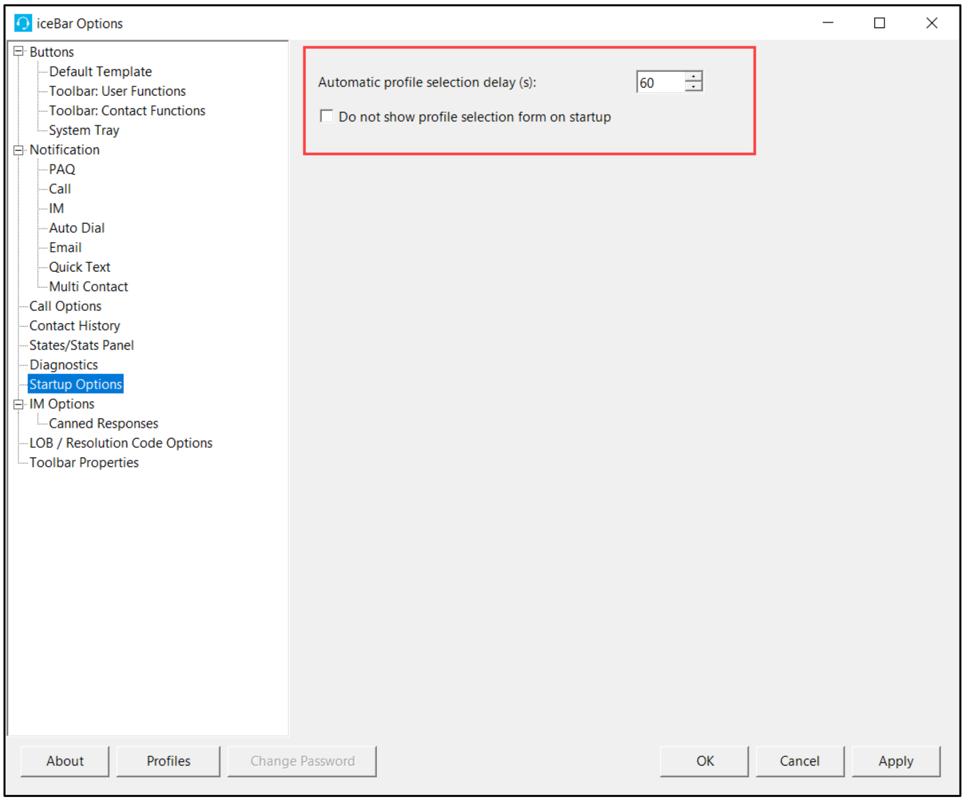
2. In the Automatic profile selection delay(s) spin box, select the desired time in seconds.
3. Click *Apply*, then *OK*.

Disabling Profile Selection

The Select Profile window can be disabled. This is useful if you do not use multiple profiles.

To disable the Select Profile window so that it does not appear when launching iceBar:

1. Navigate to the Startup Options menu.
2. Enable the checkbox 'Do not show profile selection form on startup'.



3. Click *Apply* and *OK*.

Changing your iceBar Password

In addition to a User ID, a password is required when a user logs on to iceBar. The default password for a new user is 123.

To modify your password:

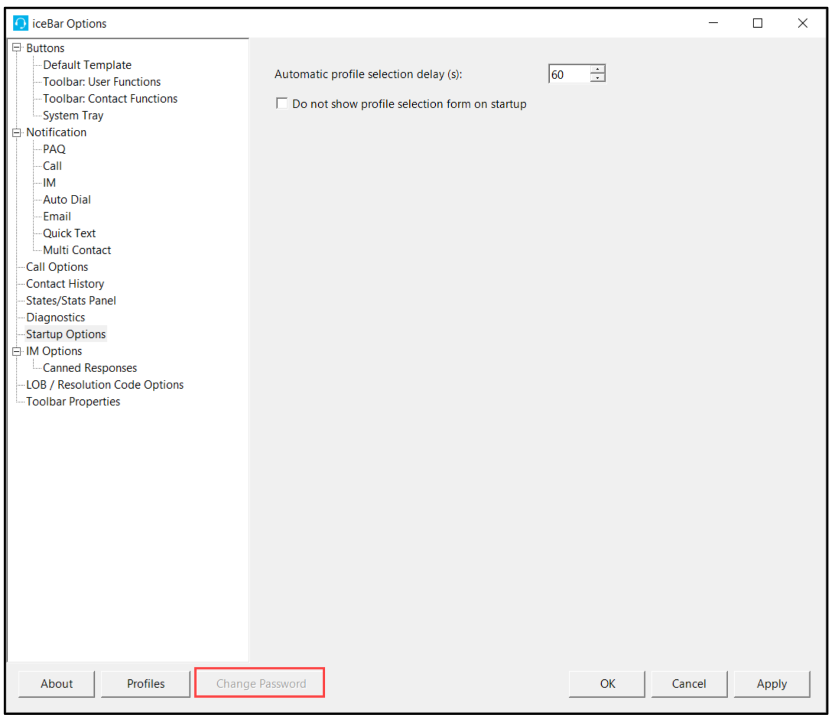
If you have the *Options* button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.

   A menu appears.

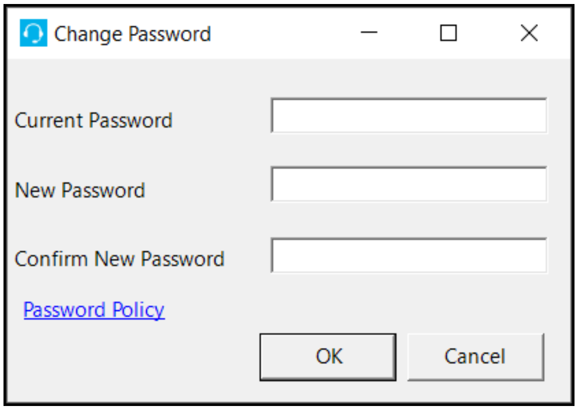
2. Select *Options*.

   The iceBar Options menu appears.



3. Click *Change Password*.

   The Change Password dialog box appears.



4. Enter the current password in the first field.
5. Enter the new password in the second field.
6. Enter the new password again in the third field.
7. Click *OK* to save your new password or *Cancel* to exit without changing the password.

Note:

- The user's current password must be known in order to change the password in iceBar. If the current password is unknown, the password must be reset in iceAdministrator. For more information, refer to the iceAdministrator User Manual.
- Passwords must be a minimum of 3 characters and a maximum of 32 characters in length. The minimum can be changed in iceAdministrator.
- Passwords may be alphanumeric. For remote users entering a password into their telephone upon login, they may press the number that corresponds with a letter. The letter Q is assigned to the 7, and the letter Z is assigned to the 9. Special characters (e.g., &!@) are input using the * key on your phone. For example, if the password is "p@ssWord1", it can be entered on the phone as "7*7796731."

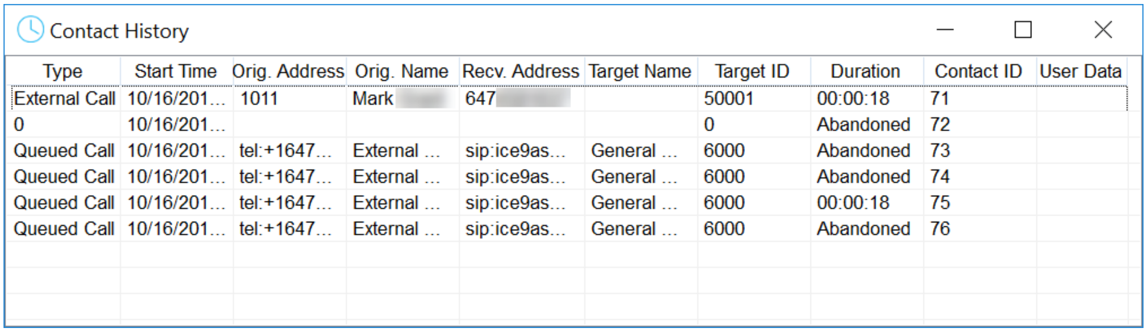
Chapter 3: Contact History

Contact History displays information about the individual contacts that you have handled. It also shows information about missed calls, which are calls that have alerted at your workstation but have not been answered. Queued calls, queued IMs, queued email, outbound calls, and direct inbound calls are all included in Contact History. If caller line identification is enabled on incoming lines, the source of calls (i.e., name and number) is provided on this screen.

Another component of Contact History is iceBar's ability to send a user a notification email containing information about a missed call. It can also be configured to send a notification email for every contact received or initiated.

To open the 'Contact History' window, click the *Contact History* button on iceBar or the System Tray Menu, depending on your configured options. For more information, refer to page 72.

The Contact History window opens.


Contact History

Type	Start Time	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Duration	Contact ID	User Data
External Call	10/16/201...	1011	Mark	647		50001	00:00:18	71	
0	10/16/201...					0	Abandoned	72	
Queued Call	10/16/201...	tel:+1647...	External ...	sip:ice9as...	General ...	6000	Abandoned	73	
Queued Call	10/16/201...	tel:+1647...	External ...	sip:ice9as...	General ...	6000	Abandoned	74	
Queued Call	10/16/201...	tel:+1647...	External ...	sip:ice9as...	General ...	6000	00:00:18	75	
Queued Call	10/16/201...	tel:+1647...	External ...	sip:ice9as...	General ...	6000	Abandoned	76	

The sections that follow describe the information displayed in Contact History, explain how to sort contacts, and describe how to configure the Contact History window.

Understanding Contact History

Each row in Contact History represents a contact that you have handled or missed. By default, these contacts are displayed according to the time that they were received, with the most recently handled or missed contact appearing in the top row. By default, Contact History shows 10 rows, but it can be configured to show fewer or more records.

Note: The information in Contact History is saved in a file with your User ID (if multiple users log on to the same PC, they see only their own Contact History). The next time you launch iceBar, you are able to view contacts handled or missed. Contact History does not show information about contacts that were presented to you while you were not running iceBar.

The table below describes each column in Contact History:

Contact History Columns	
Column	**Description**
Type	Displays the type of contact: an inbound call, an outbound call, a consult/conference call, or an inbound email/IM. For more information on types of contacts displayed in Contact History, refer to the table on the next page.
Start Time	Displays the date and time that you began handling or missed a contact.
Orig. Address	Displays the telephone number of the caller or the email/SIP address of the sender. If the originating address is not available, it reads 'No Caller ID'. For outbound calls, this field displays your User ID.
Orig. Name	Displays the name of the caller or the email/IM name of the sender. If the originating name is not available, this field is left blank. For outbound calls, this field displays your name.
Recv. Address	Displays the number the caller has dialed, or the email/SIP address to which the message has been sent. For an outbound call, this field displays the number you dialed.

Contact History 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.
Duration	The total amount of time that you spent handling the contact. If you are currently handling this contact, this field displays On Call or On Email.
Contact ID	A unique number assigned by ice to the contact.
User Data	The 'User Data' field shows information that is specific to a contact, such as an account number.

From Contact History, you can view different types of contacts, as described in the table below:

Contact Types	
Type	**Description**
Autodial	Represents a virtual call that ice has routed to you (e.g., a voicemail in queue).
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.
Queued IM	Represents a queued instant message that you have received (i.e., web chat, SMS, or social media message contact).

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.
Queued Email	Represents a queued email (i.e., email or social media post contacts).

Placing a Call

You can use Contact History to place a call to a number that you have previously dialed or to dial the number of a caller who previously called you.

To use Contact History to make a call:

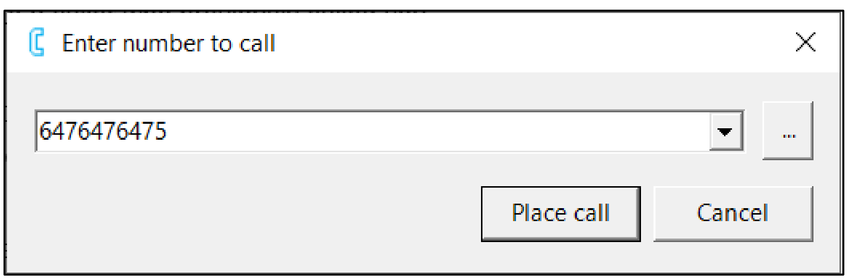
STATE

On a Call

Right-click the row in Contact History that represents the contact that you wish to call.

Click *Place Call*.

The Enter number to Call window will open.



Enter the number you wish to call.

Click the *Place Call* button.

Notice that the 'State' field changes to indicate that you are on a call. Other buttons on the toolbar become available.

Note:

- You may also right-click the row and choose 'Place Call' from the menu that appears.

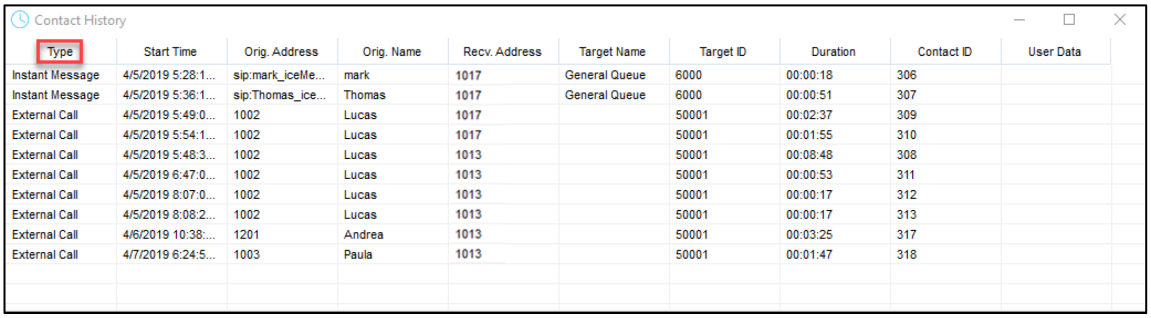
- If you initiate a call when your ice telephone line is on hook, then ice must first place a call to you. When you pick up your ringing phone, you are connected with the number you dialed.

Dragging and Dropping Columns

Contact History allows you to reposition the columns that display information about each contact.

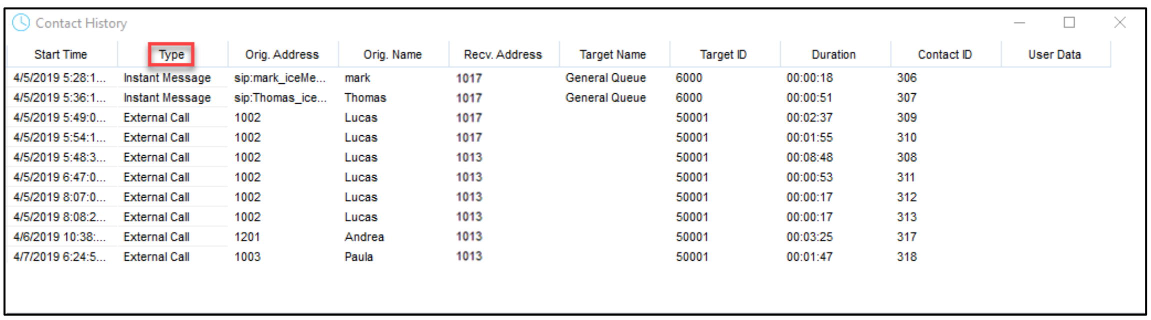
For example, if you wish to view the contact's name first, simply drag and drop the column to the left side of the window.

In the example below, the 'Type' field has been dragged to the right.



Contact History

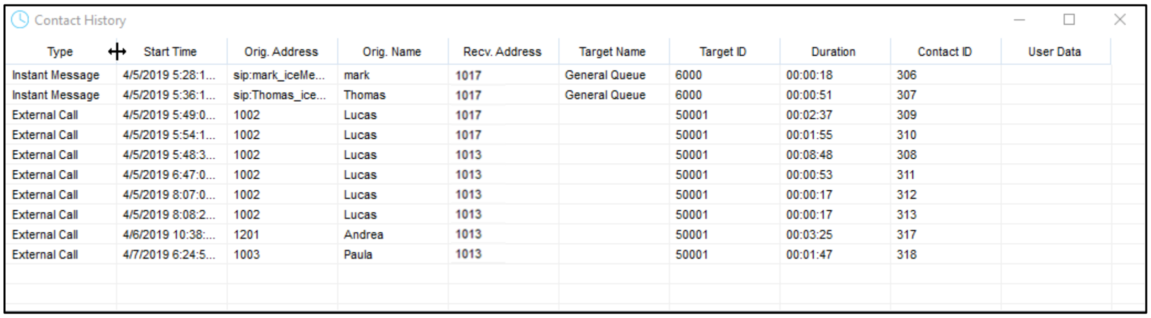
Type	Start Time	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Duration	Contact ID	User Data
Instant Message	4/5/2019 5:28:1...	sip:mark_iceMe...	mark	1017	General Queue	6000	00:00:18	306	
Instant Message	4/5/2019 5:36:1...	sip:Thomas_ice...	Thomas	1017	General Queue	6000	00:00:51	307	
External Call	4/5/2019 5:49:0...	1002	Lucas	1017		50001	00:02:37	309	
External Call	4/5/2019 5:54:1...	1002	Lucas	1017		50001	00:01:55	310	
External Call	4/5/2019 5:48:3...	1002	Lucas	1013		50001	00:08:48	308	
External Call	4/5/2019 6:47:0...	1002	Lucas	1013		50001	00:00:53	311	
External Call	4/5/2019 8:07:0...	1002	Lucas	1013		50001	00:00:17	312	
External Call	4/5/2019 8:08:2...	1002	Lucas	1013		50001	00:00:17	313	
External Call	4/6/2019 10:38:...	1201	Andrea	1013		50001	00:03:25	317	
External Call	4/7/2019 6:24:5...	1003	Paula	1013		50001	00:01:47	318	



Contact History

Start Time	Type	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Duration	Contact ID	User Data
4/5/2019 5:28:1...	Instant Message	sip:mark_iceMe...	mark	1017	General Queue	6000	00:00:18	306	
4/5/2019 5:36:1...	Instant Message	sip:Thomas_ice...	Thomas	1017	General Queue	6000	00:00:51	307	
4/5/2019 5:49:0...	External Call	1002	Lucas	1017		50001	00:02:37	309	
4/5/2019 5:54:1...	External Call	1002	Lucas	1017		50001	00:01:55	310	
4/5/2019 5:48:3...	External Call	1002	Lucas	1013		50001	00:08:48	308	
4/5/2019 6:47:0...	External Call	1002	Lucas	1013		50001	00:00:53	311	
4/5/2019 8:07:0...	External Call	1002	Lucas	1013		50001	00:00:17	312	
4/5/2019 8:08:2...	External Call	1002	Lucas	1013		50001	00:00:17	313	
4/6/2019 10:38:...	External Call	1201	Andrea	1013		50001	00:03:25	317	
4/7/2019 6:24:5...	External Call	1003	Paula	1013		50001	00:01:47	318	

The column widths can also be adjusted. In the example below, ‘Start Time’ is being expanded.



Type	Start Time	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Duration	Contact ID	User Data
Instant Message	4/5/2019 5:28:1...	sip:mark_iceMe...	mark	1017	General Queue	6000	00:00:18	306	
Instant Message	4/5/2019 5:36:1...	sip:Thomas_ice...	Thomas	1017	General Queue	6000	00:00:51	307	
External Call	4/5/2019 5:49:0...	1002	Lucas	1017		50001	00:02:37	309	
External Call	4/5/2019 5:54:1...	1002	Lucas	1017		50001	00:01:55	310	
External Call	4/5/2019 5:48:3...	1002	Lucas	1013		50001	00:08:48	308	
External Call	4/5/2019 6:47:0...	1002	Lucas	1013		50001	00:00:53	311	
External Call	4/5/2019 8:07:0...	1002	Lucas	1013		50001	00:00:17	312	
External Call	4/5/2019 8:08:2...	1002	Lucas	1013		50001	00:00:17	313	
External Call	4/6/2019 10:38:...	1201	Andrea	1013		50001	00:03:25	317	
External Call	4/7/2019 6:24:5...	1003	Paula	1013		50001	00:01:47	318	

Sorting Contact History

If you are looking for a contact that you have already handled, you can sort information in the Contact History window by any of the fields (columns).

- The headings for the ‘Orig. Name’ and ‘Target Name’ fields can be clicked to sort rows alphabetically, in ascending order (i.e., from A to Z). You can click any of the headings again to sort alphabetically in descending order (i.e., from Z to A).
- ‘Start Time’, ‘Orig. Address’, ‘Target ID’, ‘Duration’, ‘Contact ID,’ and ‘Recv. Address’ can be clicked to sort the rows numerically and in ascending order. You can click the headings again to sort the columns numerically and in descending order.
- Clicking the ‘Type’ column sorts the rows by contact type.

Configuring Contact History

Contact History has configurable settings that allow you to customize the window. The following sections provide more details on these configurable settings.

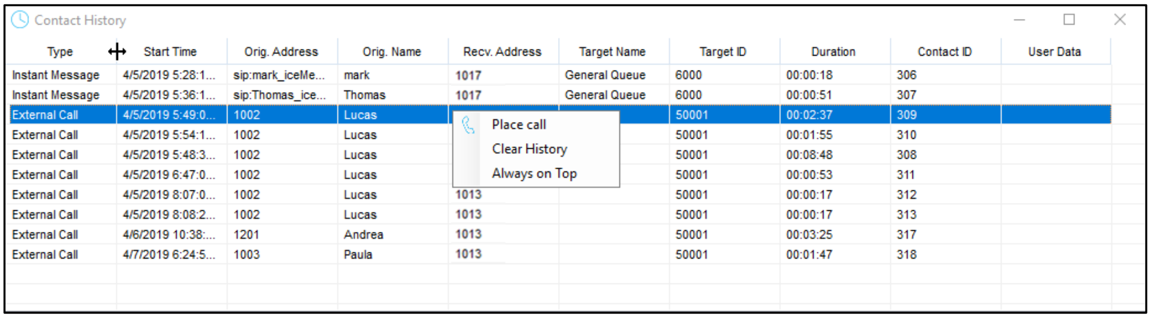
Setting on Top

By default, Contact History sits behind the windows of other applications that you use on your computer.

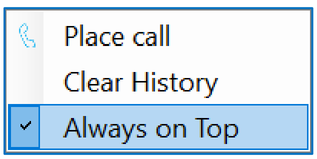
To change this setting:

1. Right-click any row in Contact History.

   A menu appears.



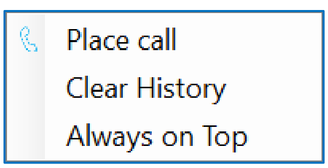
1. Left-click Always on Top. A checkmark appears to the left of the label:



   Contact History now sits on top of other applications.

2. To remove this feature, right-click any row.

   Left-click ‘Always on Top’ from the menu that appears in order to clear the checkmark.



Setting Rows

By default, Contact History shows the last 10 contacts you have handled. It can show a virtually unlimited number of contacts.

To change the number of rows:

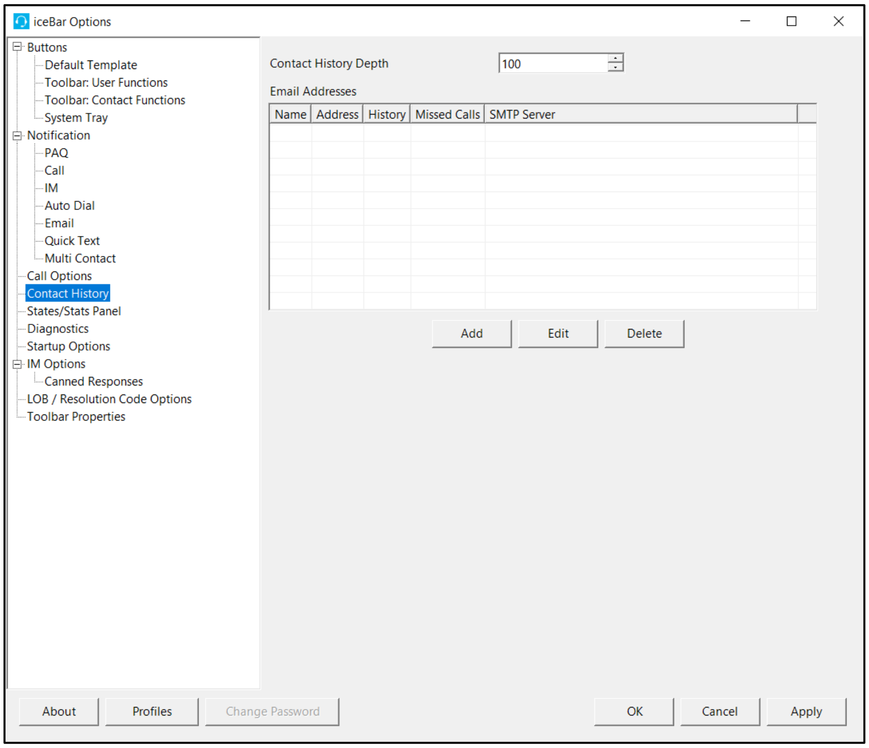
Note: If you have the Options button configured on the toolbar, click on it and proceed to step 3.

1. Right-click any blank space on the iceBar.

A menu appears.

2. Select 'Options'. The iceBar Options menu appears.
3. Select 'Contact History' from the tree view by single clicking on it.

   The right side of the Options window displays your Contact History settings:



4. Enter the desired number of rows in the Contact History spin box; you may either enter the number by typing it or use the up and down buttons.
5. Click *OK* to save your changes.

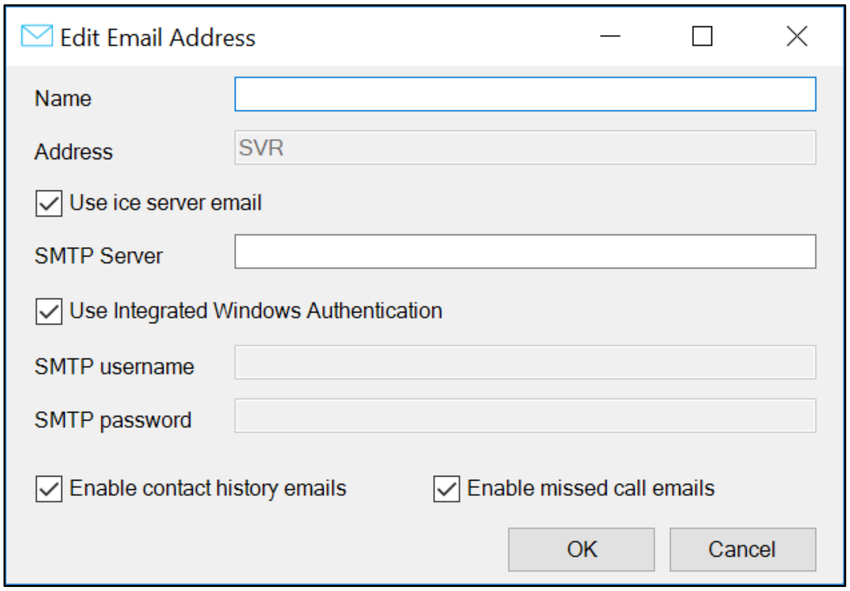
Contact History Notification or Missed Call Notification Email

To receive emails notifying you of contact history or of missed contacts:

1. From the iceBar Options menu, select 'Contact History' from the tree view by single clicking on it.

   The right side of the Options window displays your Contact History settings.

2. Click *Add.* A dialog box opens:



3. Enter a name for this notification in the 'Name' field.
4. Select the desired checkboxes and fill in any required information.
5. Click *OK*.

   To edit an existing notification, select it by highlighting the appropriate row, click *Edit,* make your changes and click *OK*.

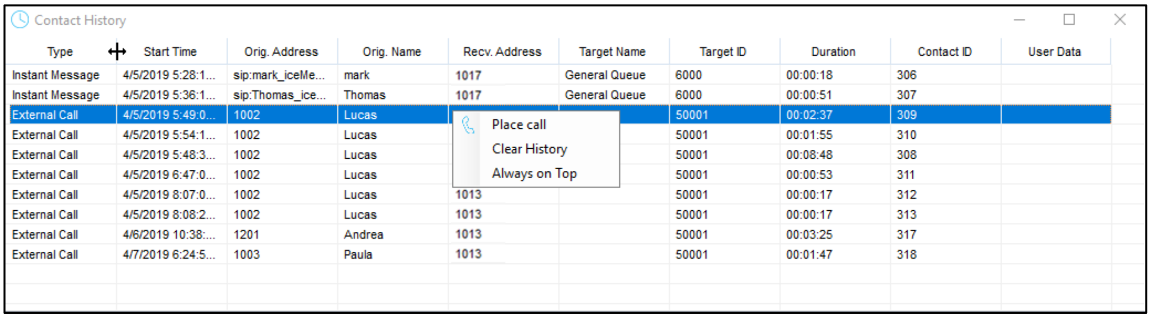
   To delete an existing notification, select it by highlighting the appropriate row, click *Delete,* and click *OK*.

Clearing Contact History

<u>To delete the entries stored in Contact History:</u>

1. Right-click on any row.

   A menu appears.



2. Left-click Clear History.

   All entries in the 'Contact History' are deleted.

Chapter 4: 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:

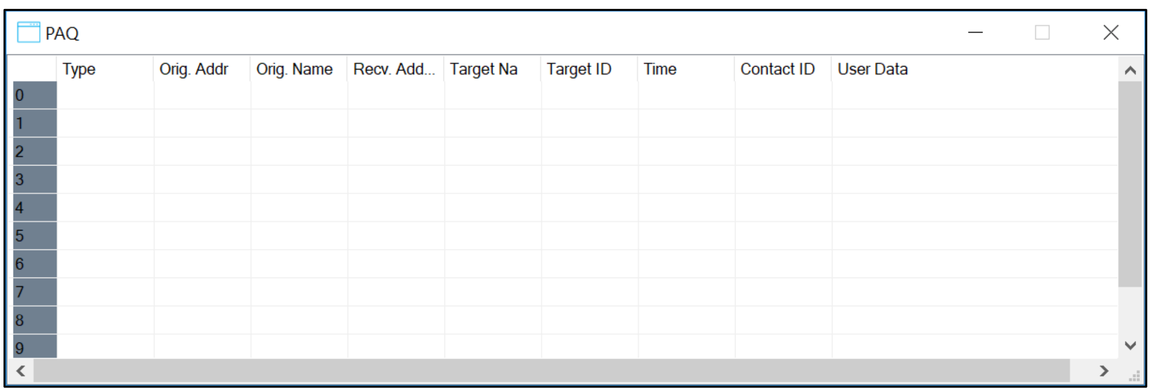
- You hear a beep in your handset or headset when a call is placed in your PAQ.
- If you have two calls waiting, you hear two beeps, three beeps for three calls waiting and so on.
- The beeps are replayed every ten seconds as long as there are contacts waiting in your PAQ.
- A lower-toned beep is also 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.

There are several ways to access your PAQ, depending on your configuration.

- Click 'PAQ' from iceBar's right-click menu.
- Click the PAQ window button on iceBar.
- Right-click on the System Tray icon and select 'PAQ'. For more information, refer to page 72.

The PAQ window appears.



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).

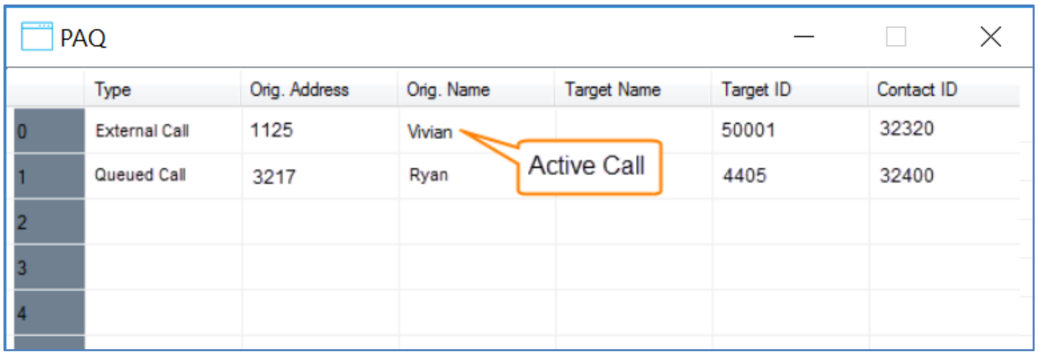
- Calls waiting in the PAQ are only visible to the individual the PAQ is associated with
- Closing the PAQ does not remove the calls from the PAQ. The calls must be handled.

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 in the PAQ window is disabled when you are silent monitoring or coaching a contact.

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 below describes each column in the PAQ window.

PAQ Columns	
Column	**Description**
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.
Orig. Address	Displays the telephone number of the caller, or the email address of the sender, if available. Otherwise, it reads “No Caller ID”. 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”. 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.
Time	Displays the number of seconds the contact has been in its current PAQ position. Display is in format: HH:MM:SS.

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.
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. For more information, refer to page 146.

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 Configuring Call Options on page 89.

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**

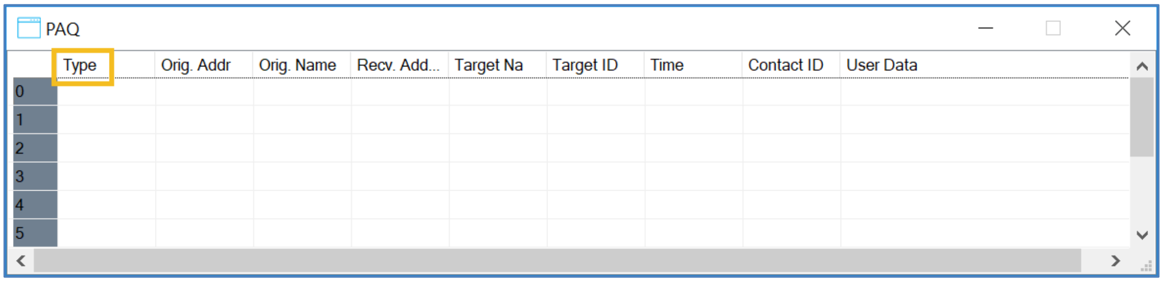
Autodial	Represents an outbound call that ice has made on your behalf (e.g., a voicemail in queue or outbound campaign).
Inbound Direct Call	Represents a call that has been routed directly to your user ID.
Consult or Conference Call	Represents a consultation that you have initiated.
Direct email	Represents 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.

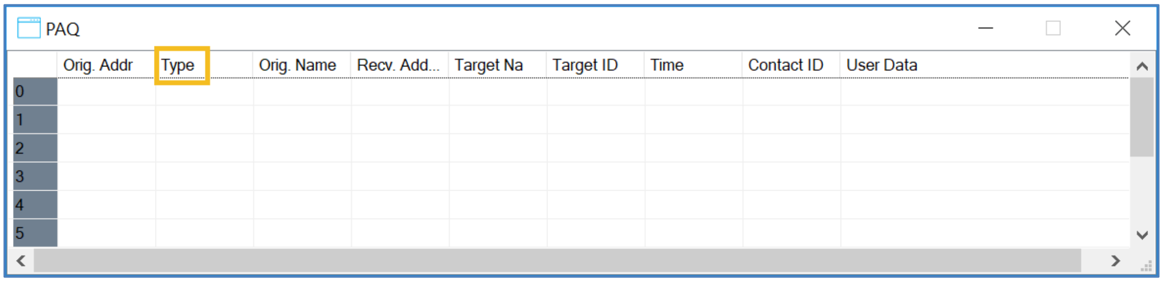
Configuring the PAQ Window

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.

Dragging and Dropping Columns

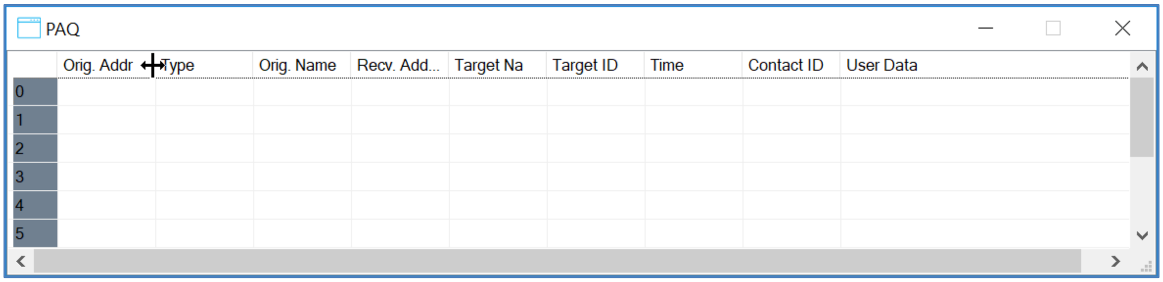
As an alternative to scrolling back and forth to view certain pieces of information, you can reposition the columns, allowing more important information to be displayed closer together on screen. Simply drag and drop the column that you want to move to a new location as shown below.





In the example above, the 'Type' column has been dragged to the right.

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

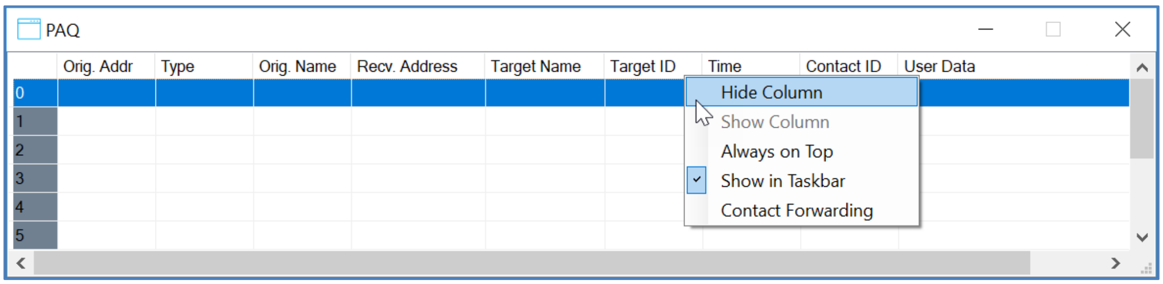


Hide/Show Columns

Columns can be hidden from view if they are not required.

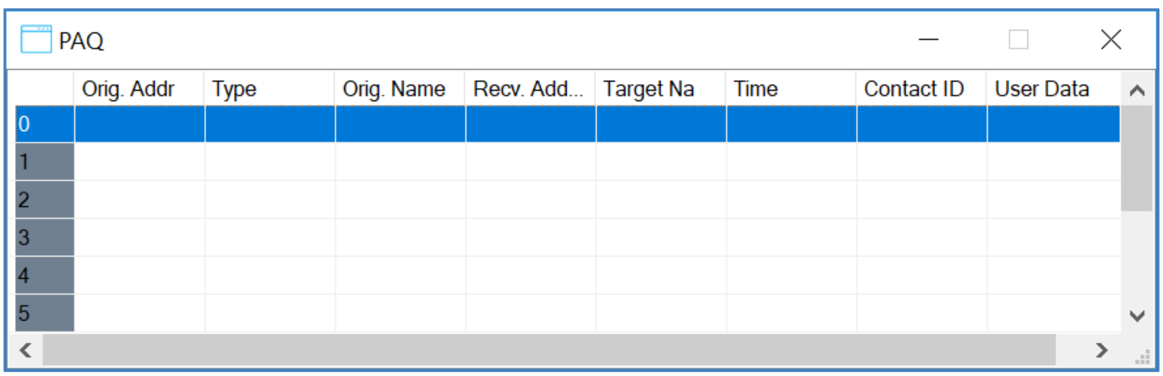
To hide a column:

1. Right-click on the name of the column that you wish to hide from view. In the example below, the user is about to hide the Target ID column.



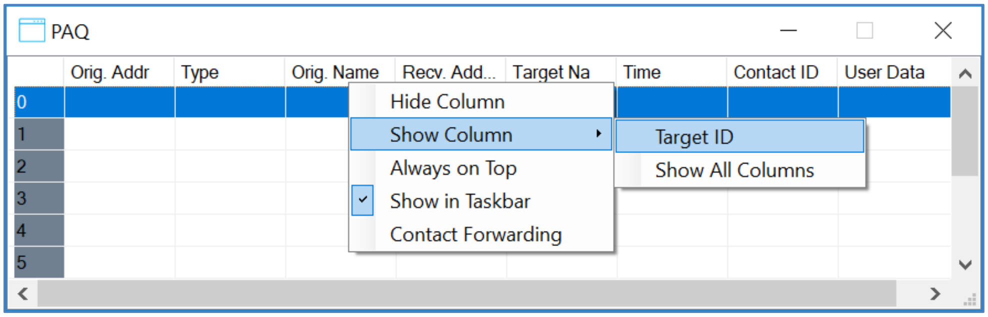
2. Select ‘Hide Column’ from the menu that appears.

   The column is removed from view and the columns to the right of it shift over. In the example below, the user successfully hid the Recv. Address column.



To show a column:

1. Right-click on the name of any column.
2. Select ‘Show Column’ from the menu that appears:



3. From the submenu that appears, select the individual column that you wish to show in the PAQ window, or select 'Show All Columns' if you wish to restore all columns.

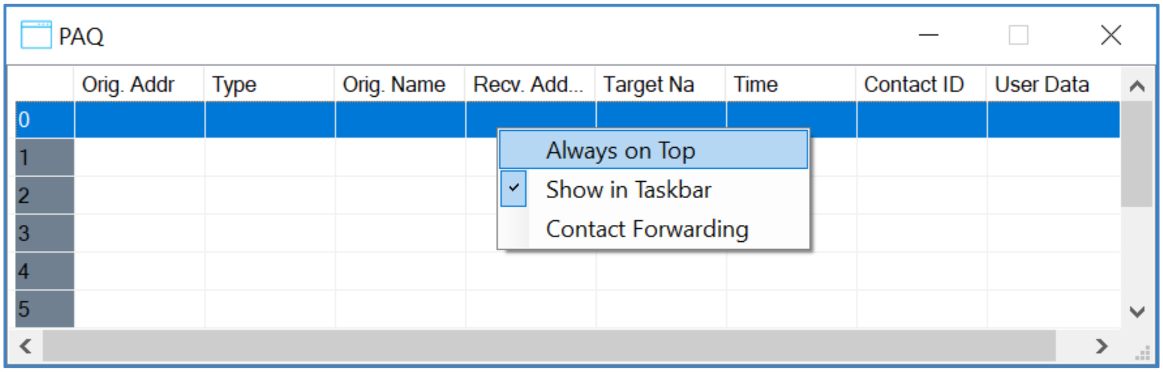
Setting on Top

The PAQ window can be configured to sit on top of other applications that you are using.

To enable this setting:

1. Right-click any row in the PAQ window.

   A menu appears.



2. Left-click 'Always on Top'. A checkmark appears to the left of the label.

   The PAQ window now sits on top of other applications.

3. To disable the Always on Top setting, right-click any row and select 'Always on Top' from the menu that appears, to clear the checkmark.

   The PAQ window no longer sits on top of other applications.

Show in Taskbar

'Show in Taskbar' refers to the option of having the PAQ window displayed as a minimized window at the bottom of your screen alongside any other applications that you might be running:

To display the PAQ window in your taskbar:

1. Right-click any row in the PAQ window.
2. Select 'Show in Taskbar' from the menu that appears. A checkmark appears to the left of the label.

   The PAQ window now appears in your taskbar.

To remove the PAQ window from your taskbar:

1. Right-click any empty row in the PAQ window.
2. Select 'Show in Taskbar' from the menu that appears to clear the checkmark.

   The PAQ window no longer appears in your taskbar.

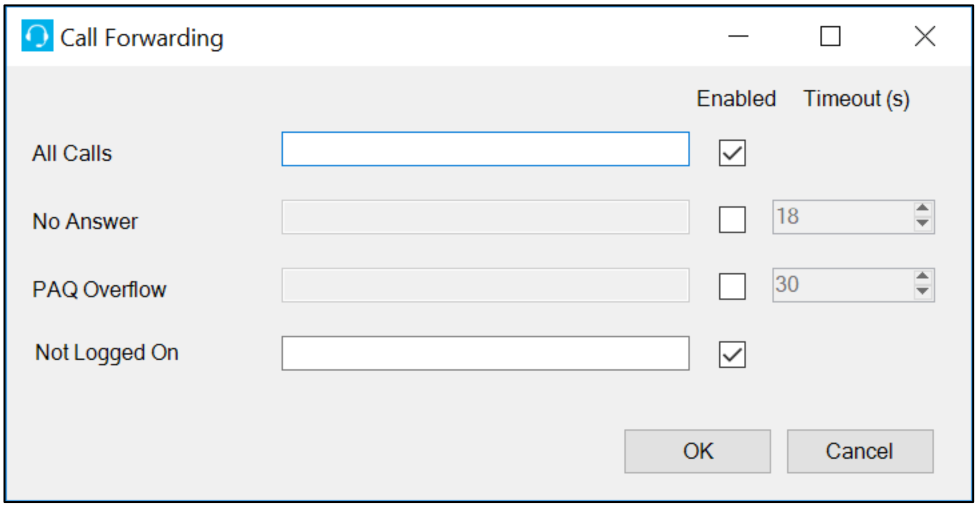
Contact Forwarding in the PAQ Window

'Call Forwarding' refers to a setting that determines how direct calls will be handled in specific situations.

To view a user's Contact Forwarding configuration:

1. Right-click any row in the PAQ window.
2. Select 'Call Forwarding' from the menu that appears.

   A dialog box appears:



These fields are explained in Configuring Call Options on page 89.

In most situations, including the above example, Call Forwarding settings are configured to send unanswered PAQ calls to a user's voicemail box.

It is strongly recommended that you talk to your ice Administrator before making changes to Call Forwarding.

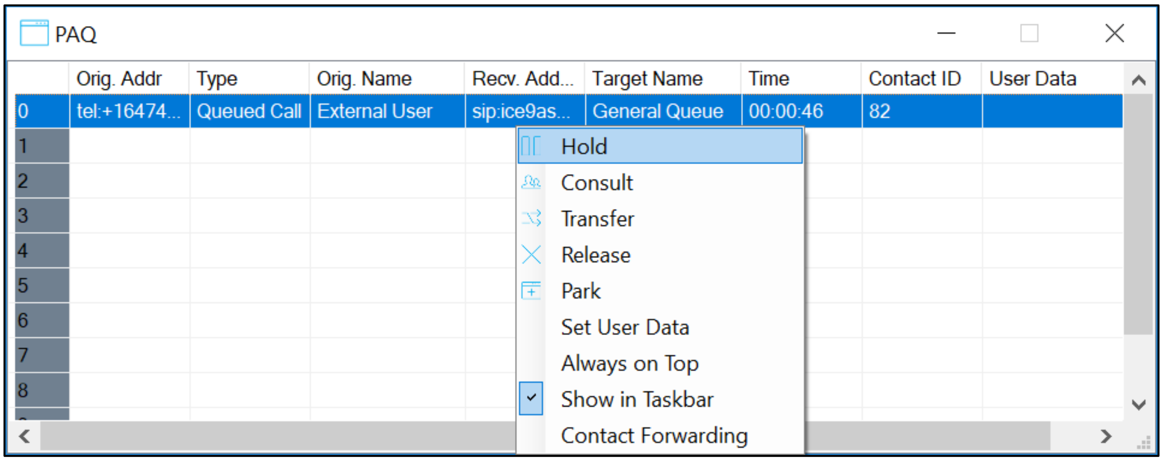
Handling an Active Contact from the PAQ Window

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: *Hold*, *Add Participant*, *Consult*, *Transfer*, *Conference*, *Release Call*, 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 place the caller on hold, left-click the 'Hold' option.

Note:

- For more information on using the menu options, refer to Chapter 7: Handling Contacts.

Setting User Data

User Data is information associated with a contact, such as a ticket number. You can modify or set the data for your active contact.

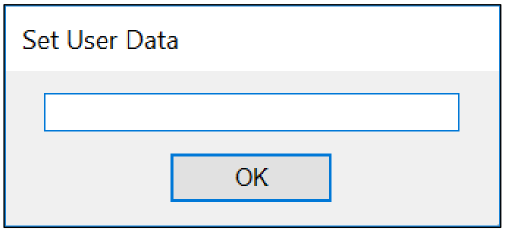
To set User Data:

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

   A menu appears.

2. Left-click ‘Set User Data’.

   A dialog box appears.



3. Enter the information that you wish to associate with the caller or modify the existing data, then click *OK*.

   The data you have entered is now set for this contact. If you transfer this contact, the receiving user will be able to view the data.

Receiving a Direct Contact

A direct contact can enter your PAQ for one of two reasons:

- If you are in a Not Ready state when the direct contact is presented to your workstation, the contact immediately enters your PAQ.
- If you are handling another contact when the direct contact is presented to your workstation, the contact immediately enters your PAQ.

The way that you receive a direct contact depends on your current state and the type of contact that you are receiving. The following sections explain the different ways in which you can receive a direct contact waiting in your PAQ.

When in Not Ready State

To receive a direct contact that is waiting in your PAQ, place yourself into the Ready state by clicking the *Ready* button on iceBar. You are then connected with the direct contact. If multiple contacts are waiting in your PAQ, you are connected with the contact that has been waiting for the longest amount of time.

Note: You may also drag and drop the contact from the waiting position into the active position. This allows you to retrieve contacts waiting in your PAQ without changing your state, and to select the contact that you wish to handle first.

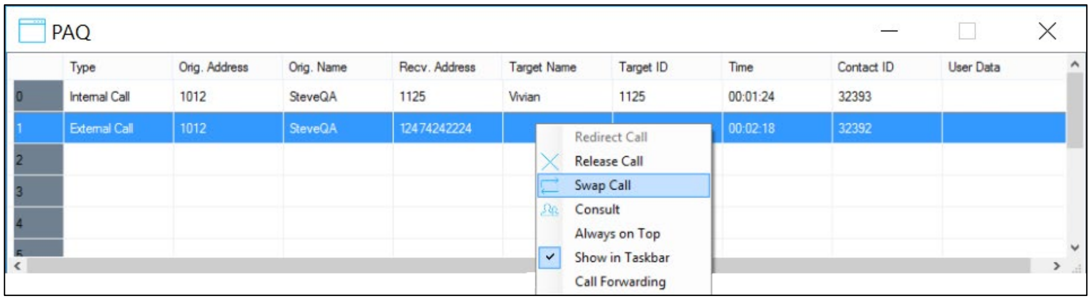
When Handling a Call

If you are handling a call when a direct call enters your PAQ, you may need to connect with the direct contact.

To connect with the direct call:

1. Right-click the direct contact waiting in your PAQ.

   A menu appears.



2. Left-click ‘Swap Call’.

   Your current call is automatically parked in your PAQ in the position the direct contact occupied. You are now connected with the direct contact. In other words, the active call and the direct call swap PAQ Positions.

Note: You may also swap calls by clicking the waiting contact and dragging it into the active position.

Other options for interacting with the waiting contact include Release Call and Pick Call. Release Call will disconnect the caller.

When Handling an Email Message (i.e., email and social media post contacts)

The Swap option described in the previous section cannot be used if your current contact is an email message or social media post.

If you are handling an email message when a direct contact enters your PAQ, you must change your state from the On Email state to the Ready or Not Ready state before you can handle the direct contact waiting in your PAQ.

You enter the email state when you accept an email message through iceBar, and you remain in this state until you click the *Ready* button (you can either left-click to go to Ready state, or right-click to go Not Ready state). When you enter the Ready state, the direct contact in your PAQ is presented to you before any other contact. If you decide to enter the Not Ready state, you will not be automatically connected with the contact waiting in your PAQ. You can drag and drop the contact from the waiting position into the active position while in the Not Ready state.

Parking Calls

PAQ Window can be used to park calls that you have answered, whether they are queued, direct or outbound calls. Parked calls remain in your PAQ indefinitely, regardless of enabled PAQ overflow thresholds.

Notes:

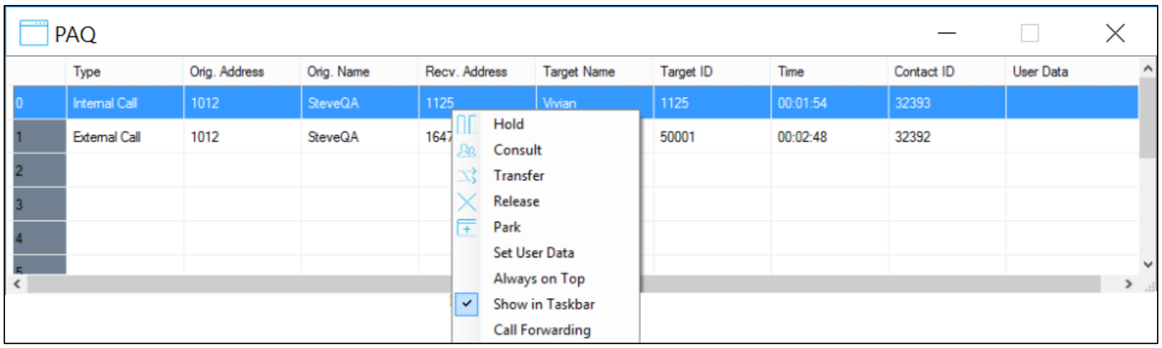
A caller hears music when parked in your PAQ.

All calls must be cleared from a user's PAQ before logging off or exiting iceBar.

<u>To park a call:</u>

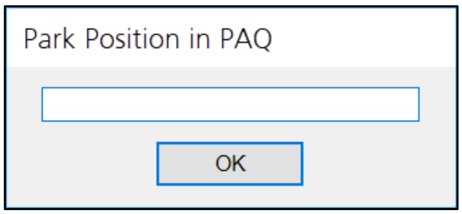
1. Right-click the active call in PAQ Window.

A menu appears.



2. Left-click 'Park.'

The 'Park Position in PAQ' dialog box appears.



3. Using your keyboard, enter the row number (i.e., the PAQ position) in which to park the caller.
4. Click *OK* to park the caller in the selected PAQ position.

You can also park a caller by dragging the caller into a PAQ position.

Note: The park option will be disabled when you are monitoring or coaching the contact.

Parking Emails

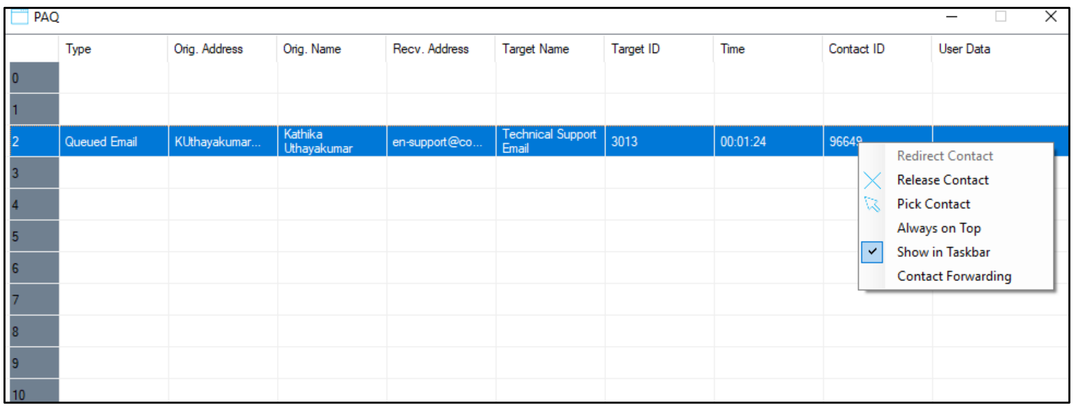
PAQ Window can be used to park emails that you have answered. This allows users to handle other contacts while accurately tracking the time the user spends on each contact. Parked emails remain in your PAQ indefinitely, regardless of enabled PAQ overflow thresholds.

Note: All emails must be cleared from a user's PAQ before they can log off or exit iceBar.

<u>To park an email:</u>

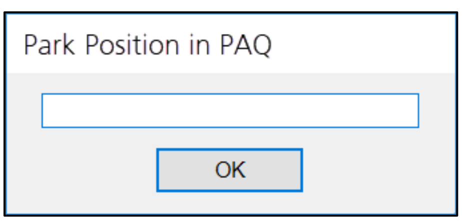
1. Right-click the active email in PAQ Window.

A menu appears.



2. Left-click 'Park'.

The 'Park Position in PAQ' dialog box appears.



3. Using your keyboard, enter the row number (i.e., the PAQ position) in which to park the email.
4. Click *OK* to park the email in the selected PAQ position.

You can also park an email by dragging the email into a PAQ position.

Retrieving Parked Calls

Calls parked in your PAQ stay there until either:

- You retrieve them.
- The caller hangs up.

The way in which you retrieve a parked call depends on your current state. The following sections explain the different ways in which you can retrieve a parked call waiting in your PAQ.

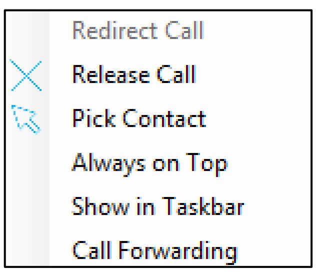
Picking a Call

If you are not already handling a contact, then you can retrieve a parked call using the Pick feature.

To pick a call:

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

   A menu appears:



2. Left-click 'Pick' from the menu.

   You are connected with the caller, who is moved to the active position, PAQ position 0.

Note: You can also pick a caller by dragging the row into the active position.

When Handling an Instant Message

If you are handling an instant message and you would like to retrieve a parked call, you must change your state from On IM to Ready or Not Ready state. The user's PAQ position 0 should now be empty. The user can now use the Pick feature described in Picking a Call on page 151 to retrieve a parked call.

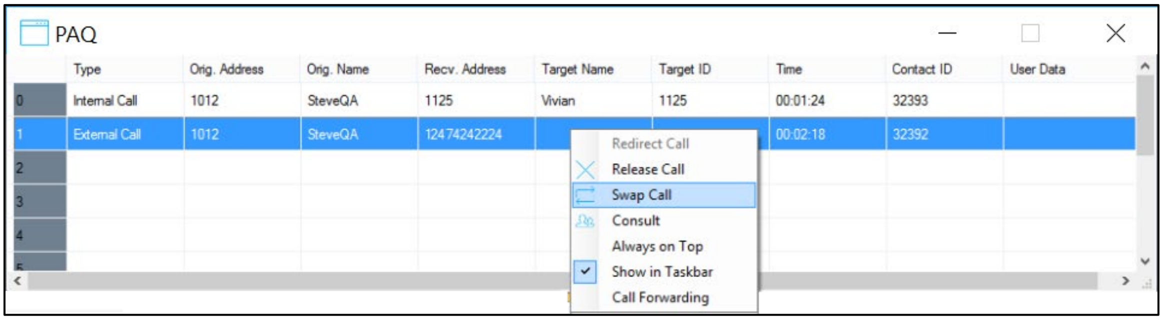
Note: When a user changes from the On IM state, the time tracking for the IM state will stop.

When Handling a Call

If you are handling a call and you would like to retrieve a call that you have parked:

1. Right-click the caller that you have already parked.

   A menu appears.



2. Left-click 'Swap'.

   Your current call is parked in your PAQ, in the position that the parked call occupied, and you are connected with the caller who was parked. In other words, the active call and the parked call swap PAQ positions.

When Handling an Email Message

The Swap option described in the previous section cannot be used if your current contact is an email message.

If you are handling an email message and you would like to retrieve a parked call, you must first park the email in your PAQ. The user's PAQ position 0 should now be empty. The user can now use the Pick feature described in the previous section to retrieve a parked call.

Retrieving Parked Emails

Emails parked in your PAQ stay there until you retrieve them.

The way in which you retrieve a parked email depends on your current state. The following sections explain the different ways in which you can retrieve a parked email waiting in your PAQ.

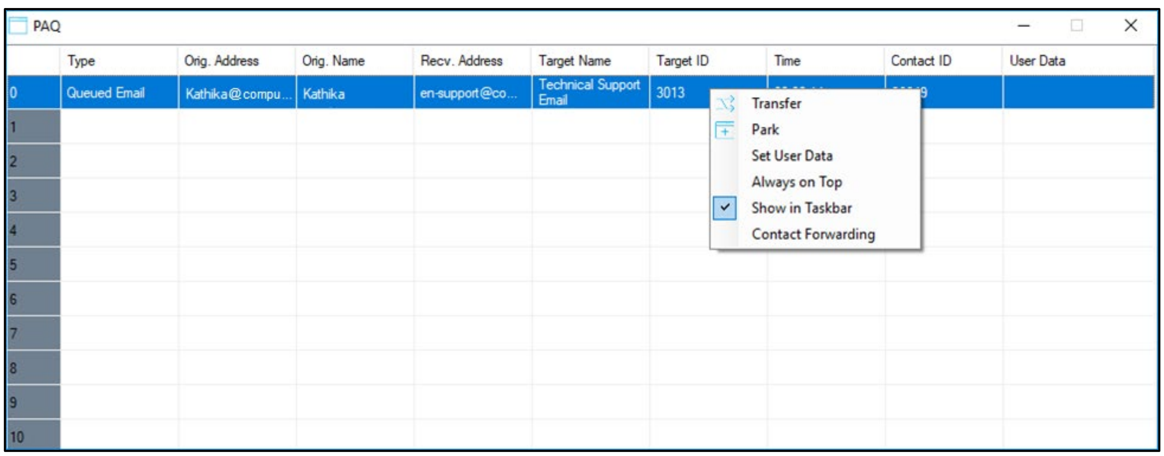
Picking an Email

If you are not already handling a contact, then you can retrieve a parked email using the Pick feature.

To pick an email:

1. Right-click the parked email in the PAQ window.

   A menu appears:



2. Left-click ‘Pick’ from the menu.

   Reporting on the email is now active and it has moved to the active position, PAQ position 0.

   Note: You can also pick an email by dragging the row into the active position.

When Handling a Call or Email Message

If you are handling a call or email and you would like to retrieve an email that you have parked. You need to park the current contact in your PAQ and then use the Pick feature described in Picking an Email on page 153.

When Handling an Instant Message

If you are handling an instant message and you would like to retrieve a parked email, you must change your state from On IM to Ready or Not Ready state. The user's PAQ position 0 should now be empty. The user can now use the Pick feature described in Picking an Email on page 153 to retrieve a parked email.

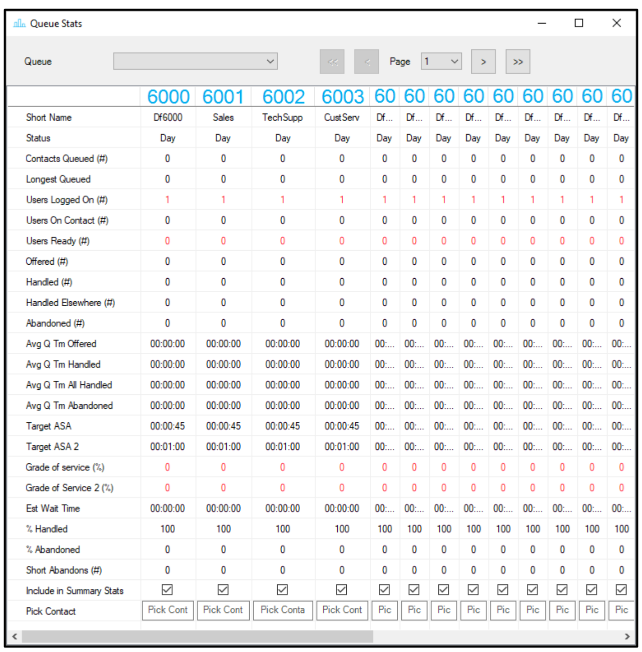
Note: When a user changes from the On IM state, the time tracking for the email state will stop.

Chapter 5: Queue Statistics

iceBar's Queue Statistics window provides real-time and historical information about activity in a queue for the current day. The window is automatically configured to show information for each queue to which you are logged on. You may also configure the Queue Statistics window to show information about other queues or to hide queues.

To open the 'Queue Statistics' window, select 'Queue Stats' from the Standalone Toolbar's right-click menu. You may also access Queue Statistics as a button on iceBar or as an option in the System Tray icon menu (for more information, refer to page 72), provided it has been programmed in these places.

The 'Queue Stats' window opens.



	6000	6001	6002	6003	60	60	60	60	60	60	60	60	60
Short Name	Df6000	Sales	TechSupp	CustServ	Df...	Df...	Df...	Df...	Df...	Df...	Df...	Df...	Df...
Status	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day
Contacts Queued (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Longest Queued	0	0	0	0	0	0	0	0	0	0	0	0	0
Users Logged On (#)	1	1	1	1	1	1	1	1	1	1	1	1	1
Users On Contact (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Users Ready (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Handled (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Handled Elsewhere (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Abandoned (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Avg Q Tm Offered	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm Handled	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm All Handled	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm Abandoned	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Target ASA	00:00:45	00:00:45	00:00:45	00:00:45	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Target ASA 2	00:01:00	00:01:00	00:01:00	00:01:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Grade of service (%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Grade of Service 2 (%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Est Wait Time	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
% Handled	100	100	100	100	100	100	100	100	100	100	100	100	100
% Abandoned	0	0	0	0	0	0	0	0	0	0	0	0	0
Short Abandons (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Include in Summary Stats	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
Pick Contact	Pick Cont	Pick Cont	Pick Conta	Pick Cont	Pic	Pic	Pic	Pic	Pic	Pic	Pic	Pic	Pic

Understanding Queue Statistics

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. The default can be changed in the switch configuration. For more information, refer to the iceAdministrator User Manual.

The following table describes each row in the 'Queue Statistics' window. The information in each column of the 'Queue Statistics' window represents a single queue, and the historical statistics represent the current day (e.g., the number of contacts that have been handled today):

Queue Statistics	
Field	**Description**
Short Name	The short name of the queue. The ice Administrator defines this name.
Status	The status of the queue: **Day**, **Night**, or **Busy**. • A queue is in Day mode when at least one user is logged into the queue, or if an ice Administrator has forced the queue into Day mode. • A queue is in Night mode when all of the users have logged off. • A queue is in Busy mode when the number of contacts in the queue is equal to a threshold that is set by an ice Administrator. When a queue is in Busy mode, no additional contacts can enter the queue. For more information, refer to the iceAdministrator User Manual.
Contacts Queued	The number of contacts currently waiting in the queue.
Longest Queued	The number of seconds that the oldest contact has been waiting in the queue. Format: HH:MM:SS.
Users Logged On	The number of users currently logged on.
Users On Contact	The number of users currently handling a contact.

Queue Statistics	
Field	**Description**
Users Ready	The number of users in the Ready state.
Offered	The total number of contacts that have been presented to the queue today.
Handled	Of the offered contacts, the number of contacts that reached a user in the originating queue.
Handled Elsewhere	Of the offered contacts, the number of contacts that have reached a user in a queue other than the originating queue.
Abandoned	Of the offered contacts, the number of callers that hung up before reaching a user.
Avg QTm Offered	The average amount of time that an offered contact waited in the queue, displayed in seconds. Format: HH:MM:SS.
Avg QTm Handled	The average amount of time that a handled contact waited in the queue before reaching a user in the originating queue, displayed in seconds. Format: HH:MM:SS.
Avg QTm All Handled	The average amount of time that a handled contact waited in the queue before reaching a user in any queue (i.e.,the originating queue or an overflow queue), displayed in seconds. Format: HH:MM:SS.
Avg QTm Abandoned	The average amount of time that a caller waited in the queue before abandoning the call (i.e.,hanging up). Format: HH:MM:SS.
Target ASA	Target Average Speed of Answer (ASA) for the queue, displayed in seconds. A time threshold set by an ice Administrator for each queue. Format: HH:MM:SS.

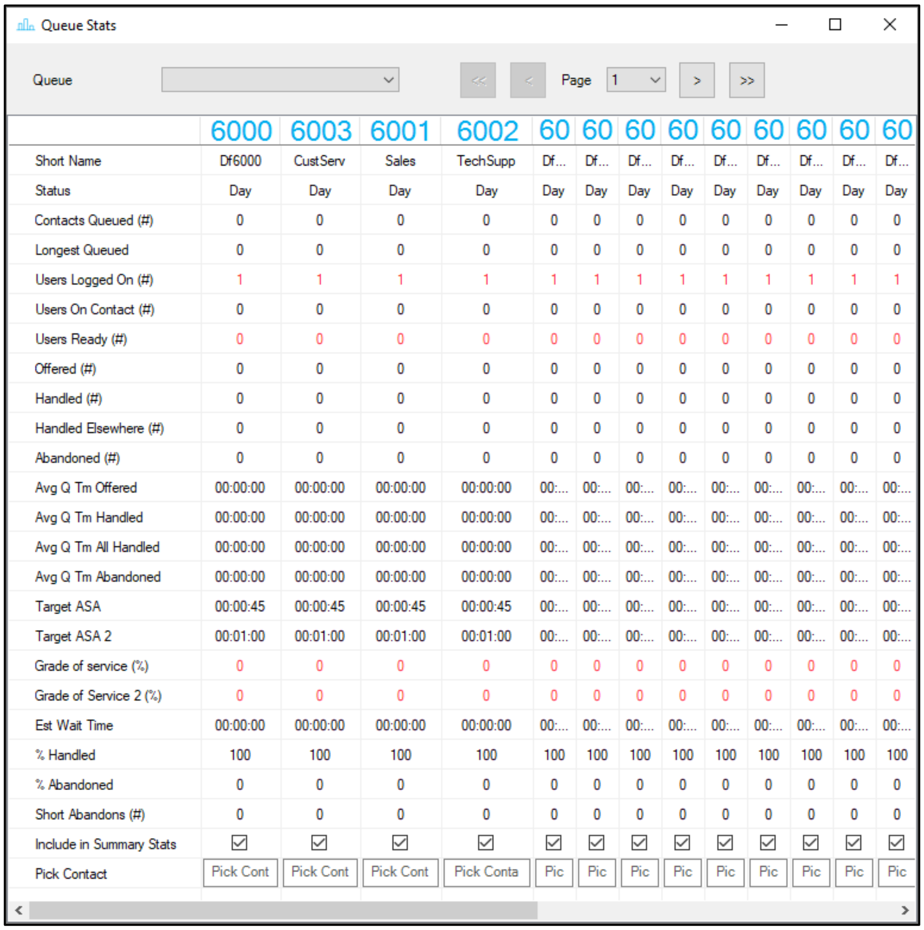
Queue Statistics	
Field	**Description**
Target ASA 2	The second Target ASA for the queue, displayed in seconds. A time threshold set by an ice Administrator for each queue. Format: HH:MM:SS.
Grade of Service	The percentage of contacts that have reached a user in less than the Target ASA. This statistic includes contacts handled in queues other than the originating queue.
Grade of Service 2	The percentage of contacts that have reached a user in less than the Target ASA 2. This statistic includes contacts handled in queues other than the originating queue.
Est Wait Time	Estimated wait time (EWT) is the last handled contact's wait time in queue, provided that the number of users logged on to the queue has not changed since that contact was handled. If the number of users logged on to the queue has changed since the last contact was handled, then the following equation is used to determine the EWT: $\text{EWT} = (x)(\frac{Y}{Z})$ Where X = the last handled contact's wait time in queue. Where Y = the number of users logged on to the queue when the last contact was handled. Where Z = the number of users currently logged on to the queue.
% Handled	Percentage of total contacts that were handled by users.
% Abandoned	Percentage of total contacts that abandoned before they could be handled by users.
Short Abandons	Number of contacts who abandoned (hung up) before reaching a user and waited less than the time specified in the Short Abandoned Threshold. This can be modified in Queue properties, set in iceAdministrator. For more information on configuring queue properties, refer to the iceAdministrator User Manual.

Queue Statistics	
Field	**Description**
Include in Summary Stats	Enable this checkbox to have the stats for a queue included in the States and Stats panel.
Pick Contact	Click this button to pick the longest waiting contact from this queue.

Dragging and Dropping Columns

If you have multiple queues configured in the 'Queue Statistics' window, you can reposition the columns to allow more important queues to be displayed first. Simply drag and drop the column to a new location as shown below:

In the sample below, Queue 7001 is dragged to the right of Queue 6001.



Queue Stats

Queue | << | < | Page 1 | > | >>

	6000	6003	6001	6002	60	60	60	60	60	60	60	60	60
Short Name	Df6000	CustServ	Sales	TechSupp	Df...	Df...	Df...	Df...	Df...	Df...	Df...	Df...	Df...
Status	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day	Day
Contacts Queued (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Longest Queued	0	0	0	0	0	0	0	0	0	0	0	0	0
Users Logged On (#)	1	1	1	1	1	1	1	1	1	1	1	1	1
Users On Contact (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Users Ready (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Handled (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Handled Elsewhere (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Abandoned (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Avg Q Tm Offered	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm Handled	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm All Handled	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Avg Q Tm Abandoned	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Target ASA	00:00:45	00:00:45	00:00:45	00:00:45	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Target ASA 2	00:01:00	00:01:00	00:01:00	00:01:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
Grade of service (%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Grade of Service 2 (%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Est Wait Time	00:00:00	00:00:00	00:00:00	00:00:00	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...	00:...
% Handled	100	100	100	100	100	100	100	100	100	100	100	100	100
% Abandoned	0	0	0	0	0	0	0	0	0	0	0	0	0
Short Abandons (#)	0	0	0	0	0	0	0	0	0	0	0	0	0
Include in Summary Stats	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
Pick Contact	Pick Cont	Pick Cont	Pick Cont	Pick Conta	Pic	Pic	Pic	Pic	Pic	Pic	Pic	Pic	Pic

Options for Queue Statistics

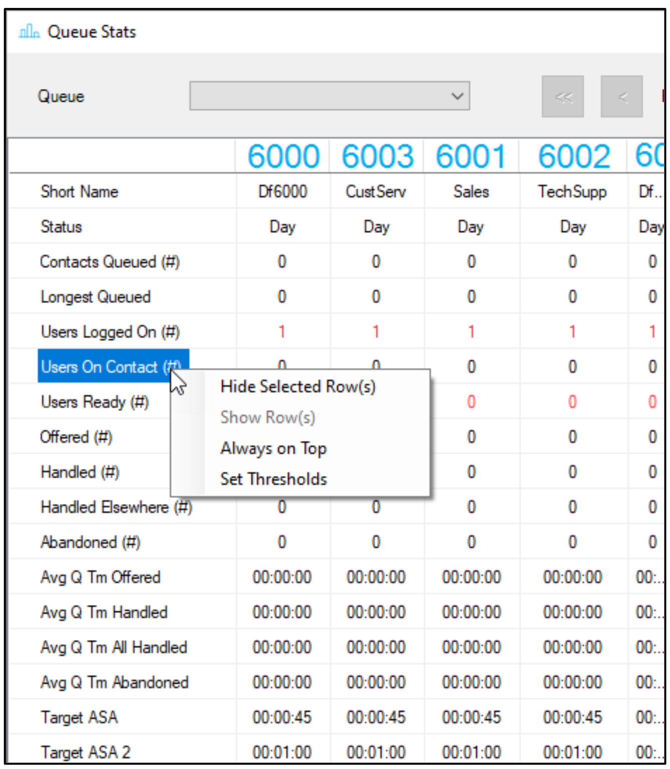
The Options menu for Queue Statistics allows you to customize settings for the window. The sections that follow explain each of the options that allow you to configure the look of the window and the information displayed in the window.

Hiding a Row

By default, the 'Queue Statistics' window shows all information available pertaining to a queue. You may remove any of the rows that are displayed in the 'Queue Statistics' window.

To hide a row:

1. Highlight the row that you wish to remove by left clicking on it. To select multiple rows, hold down the 'Ctrl' key while clicking. To select a series of consecutive rows, hold down the 'Shift' key while clicking.
2. Right-click on any of the highlighted rows.



3. Choose 'Hide Selected Row(s)'.

   The selected rows are now hidden.

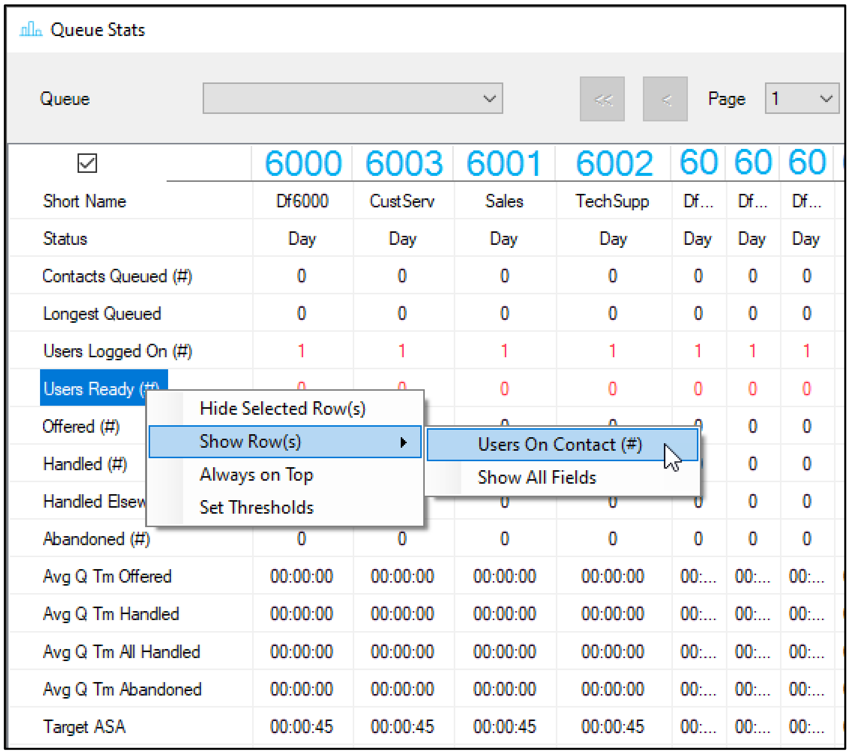
Showing a Row

You may choose to display a row that you have previously hidden from view.

To show a previously hidden row:

1. Right-click on any row.
2. Highlight the 'Show Row(s)' option from the menu that appears.

   A second menu appears.



3. Choose the row that you wish to add to the 'Queue Statistics' window, or choose 'Show All Fields' to add them all.

   The selected rows are added to the 'Queue Statistics' window.

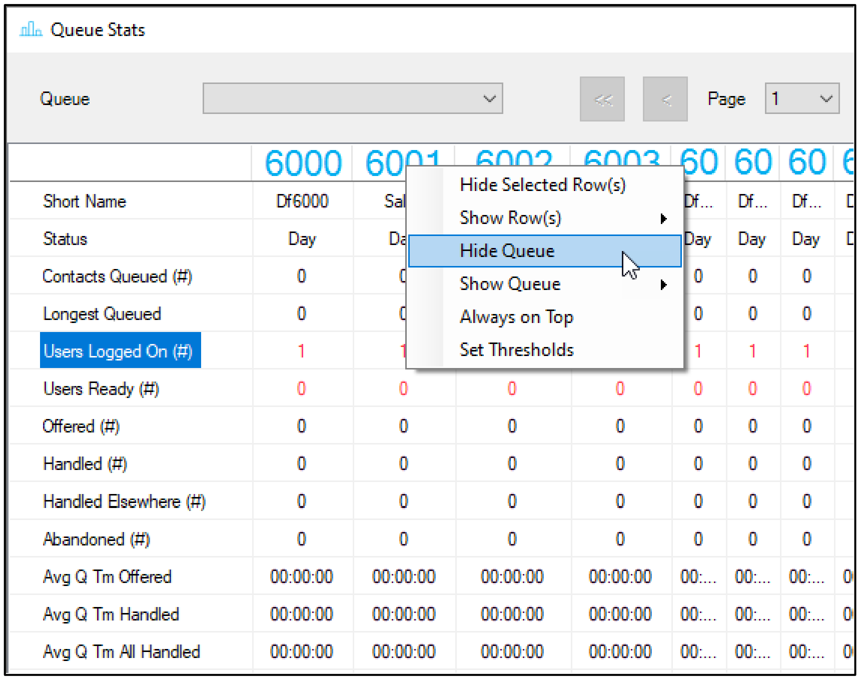
   Note: If you wish to select more than one, but not all, repeat steps 1 through 3 for each specific field that you wish to add.

Hiding a Queue

By default, the 'Queue Statistics' window shows all queues to which you are logged on. You may remove the 'Field Name' column or any of the queues that are displayed in the 'Queue Statistics' window:

To change the appearance of the 'Queue Statistics' window:

1. Right-click on the column that you wish to remove.



2. From the menu that appears, choose 'Hide Queue.'

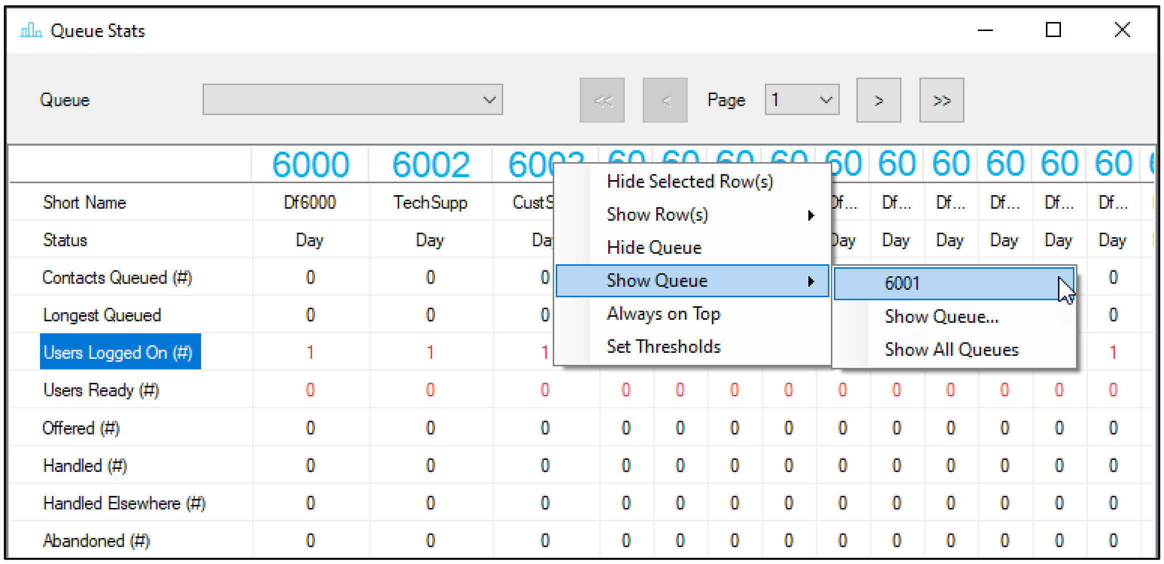
   The selected column is removed from the window.

Showing a Queue

By default, the 'Queue Statistics' window shows all queues to which you are logged on. You can add queues that have previously been removed, or you can add queues to which you are not assigned.

To add a queue to the 'Queue Statistics' window:

1. Right-click on any column heading (e.g., a Queue number), and highlight 'Show Queue.'



A list of queues appears.

2. From the list, select the individual queue that you wish to add; choose 'Show All Queues' if you wish to add them all.

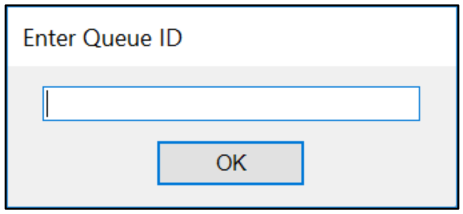
   The queue(s) are added to the 'Queue Statistics' window.

To add a queue that is not on the list:

1. Select 'Show Queue…' from the options listed in the previous menu.

   Note: You must first know the Queue ID of the queue you wish to add.

   A dialog box appears:



2. Enter the four-digit queue ID and click *OK*.

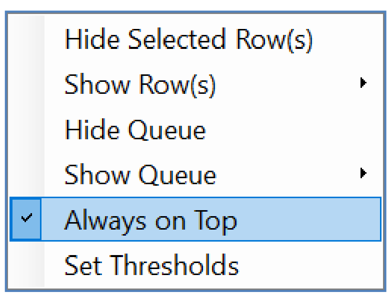
   The queue now appears in the Queue Statistics window.

Setting 'Always on Top'

By default, Queue Statistics is configured to fall behind other windows that you have open on the desktop. You can change this setting so that the 'Queue Statistics' window sits on top of other windows.

To set the 'Queue Statistics' window on top:

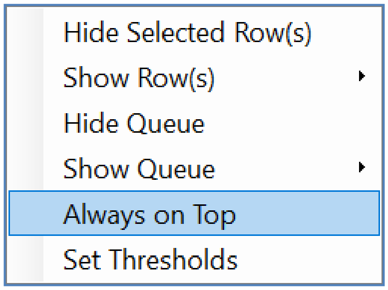
1. Right-click on any row or column in the 'Queue Statistics' window.
2. Choose 'Always on Top'.



A checkmark now appears on the menu to indicate that 'Always on Top' has been set.

To remove the 'Always on Top' option for the 'Queue Statistics' window:

1. Right-click on any row or column in the 'Queue Statistics' window.
2. Choose 'Always on Top'.



The checkmark now disappears from the menu.

Setting Thresholds

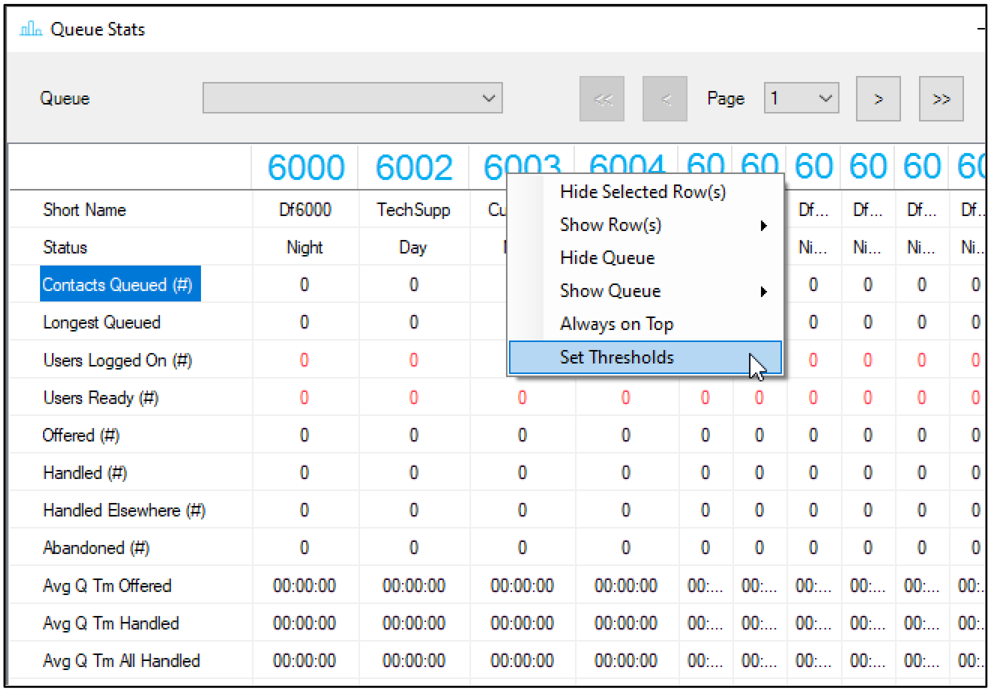
Color thresholds can be set for every statistic in the Queue Statistics window. When the Warning Threshold is met, the field turns yellow, and when the Critical Threshold is met, the field turns red (the default colors can be modified as described in this section).

Consider the following examples of thresholds in use:

- Thresholds can provide a visual alert when a high number of contacts are waiting in the queue. For example, the ‘Contacts Queued’ field can be set to turn yellow when five contacts are waiting in the queue and turn red when ten contacts are waiting in the queue.
- Thresholds can provide a visual alert when the ‘Grade of Service’ falls below specified percentages. For example, the ‘Grade of Service’ field can be set to turn yellow when the statistic reaches 79%, and turn red when the statistic reaches 69%.

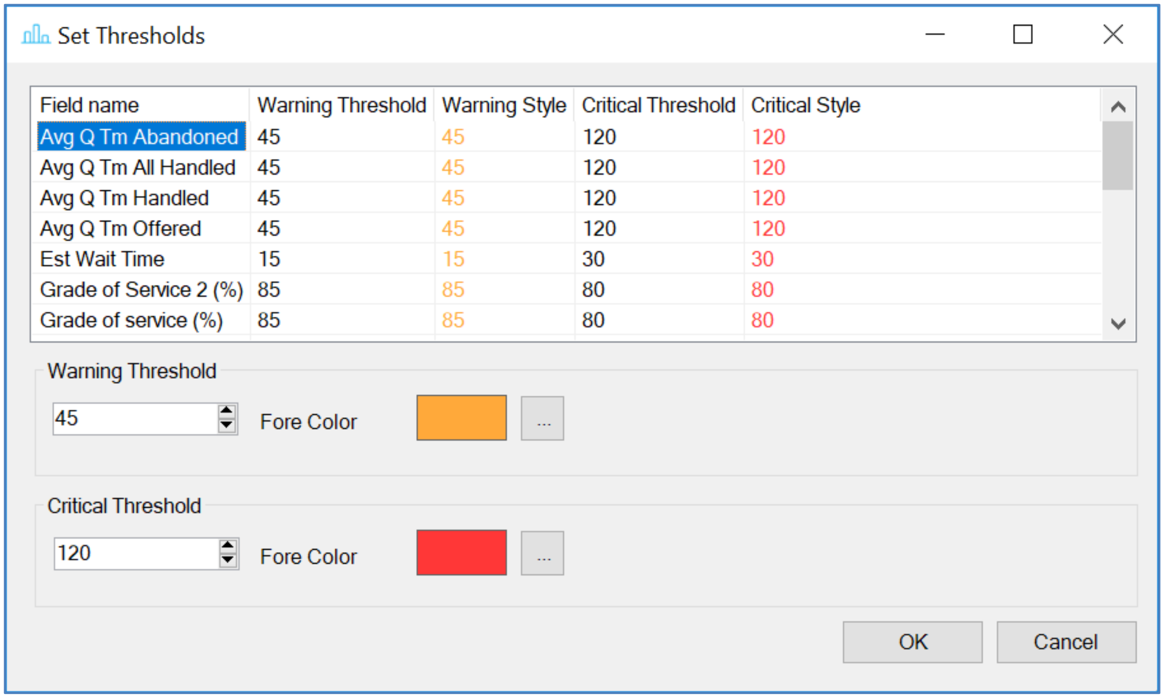
To configure the thresholds for Queue Statistics:

1. Right-click a row in the Queue Statistics window and choose ‘Set Thresholds’ from the menu that appears.



The ‘Set Thresholds’ dialog box appears. An alternative way to access the Set Thresholds dialog box is to click ‘Options’, select States/Stats, and click ‘Edit Thresholds’.

The ‘Set Thresholds’ dialog box appears.



2. To change the Warning Threshold or Critical Threshold, select an appropriate number from the related spin box.

   For some statistics, the Critical Threshold must be higher than the Warning Threshold. For those statistics, you are able to select values that fall within the current permissible range.

3. Click *OK* to save your changes or proceed to step 4 to change the color of your thresholds.

4. Select the 'Fore Color' ellipsis button () to change the color of the text for Warning Threshold and Critical Threshold.

   The 'Color' dialog box appears.

5. Select a color from the choices offered or click 'Define Custom Colors' and define the color that you wish to use from the palette provided.

6. Click *OK* to close this dialog box.

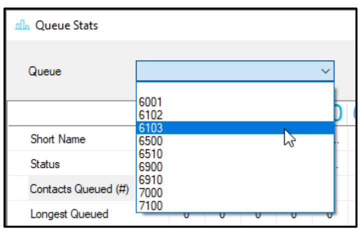
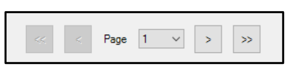
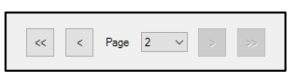
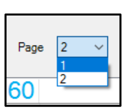
   You can also click *Cancel* to close the dialog box without applying your changes.

7. Click *OK* on the 'Set Thresholds' dialog box to save your changes.

Pagination

If you are assigned to more than 25 queues, you will have pagination available to you in the Queue Stats window.

Use the following table for information on pagination options:

Queue Statistics Pagination Options	
Option	**Description**
Queue Dropdown	This dropdown populates with all queues not on the current page. Select a Queue ID from the list to be taken to that page. 
Page Navigation buttons	Use the following buttons to navigate to the different pages of queues. • Arrows: Use the arrows to go to next, previous, first, or last page.   • Page Dropdown: Use the dropdown list to select the page you wish to navigate to. 

Chapter 6: icePhone

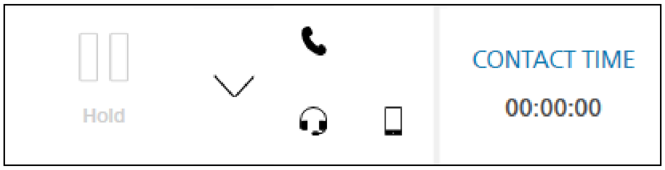
The icePhone allows users to handle phone and chat contacts natively within iceBar. It provides a standard user interface within iceBar for agents to handle calls and chats without needing a separate softphone such as Microsoft Teams or Skype for Business. This chapter explains how users can access the 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 beside the Contact Functions panel. The following section will describe the different icePhone buttons.



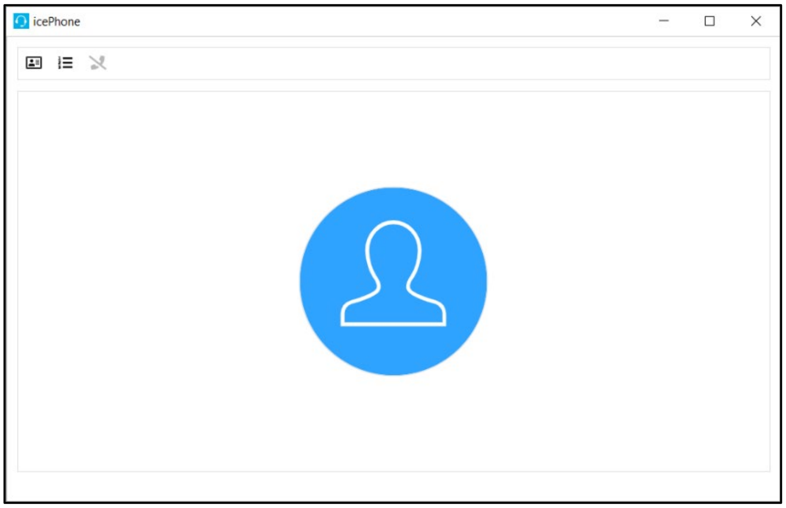
Note: The icePhone buttons will only be available if the 'Use icePhone' checkbox is enabled on your User Panel.

Show icePhone, Devices, End Off Hook

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

Show icePhone

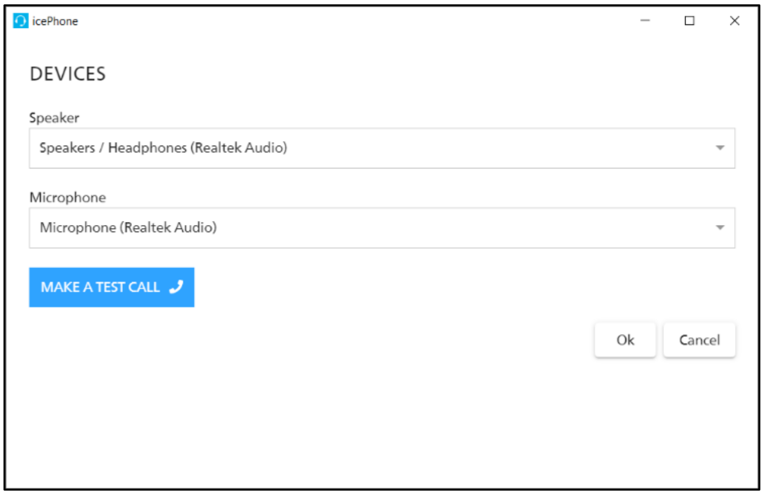
The *Show icePhone* button opens the icePhone client. If you are currently handling a contact, it will populate with the contact's information allowing you to handle the contact using the buttons along the top of the window.



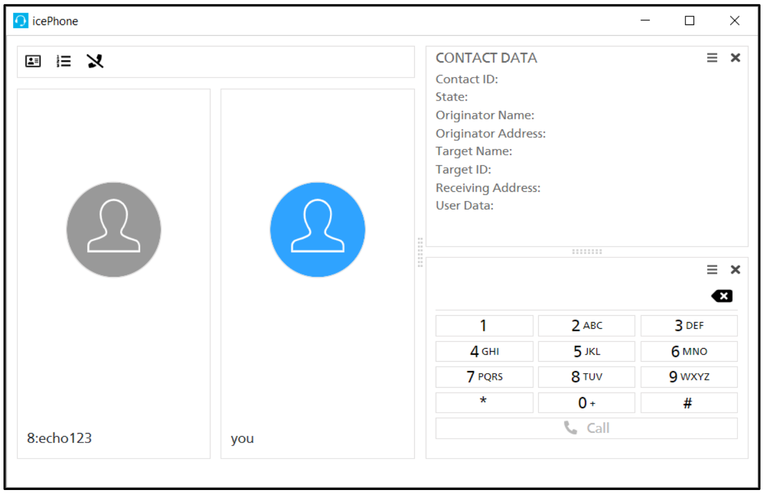
Note: Closing the icePhone window does not release your contact.

Devices

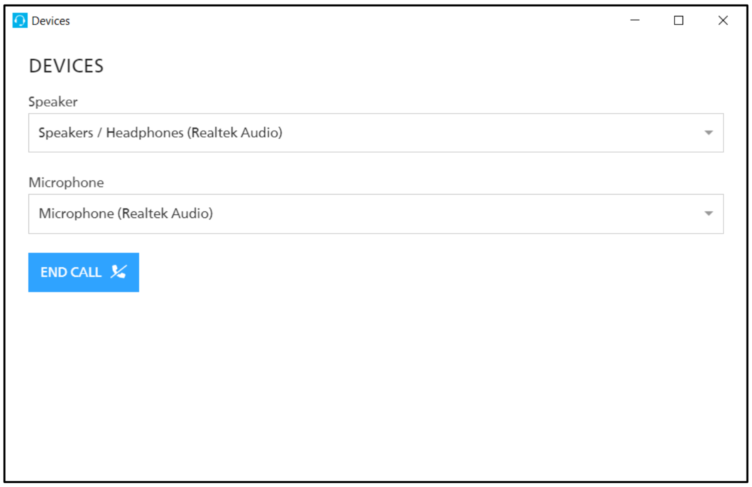
The *Devices* button opens the devices window to set the user's speaker and microphone device preferences.



The *Make a Test Call* button allows you to place a test call to test your speaker and microphone input. The following window will open in which you will be instructed to record a message after the beep to test your inputted audio configuration.



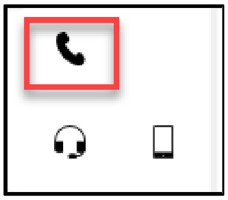
To close the Devices window, click *End Call*.



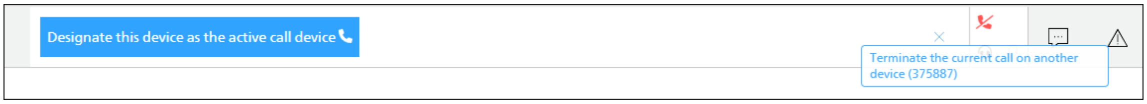
End off-hook/Set as active call device

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

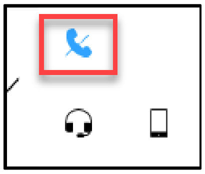
If you are already on-hook, clicking this button will set your current iceBar as your active call device and will place you off-hook in preparation for your next contact.



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



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 page 4.

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.

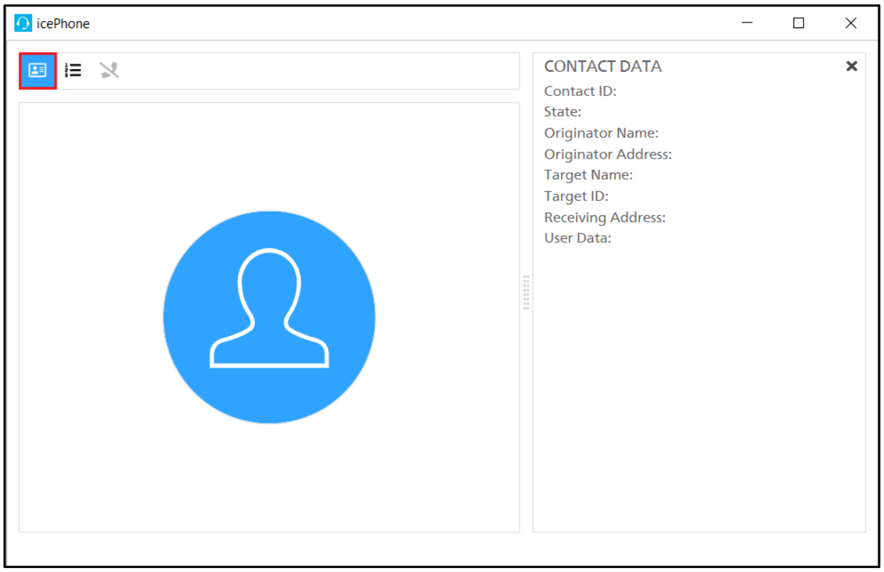
icePhone for Voice

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 on the icePhone client window.

Contact Data

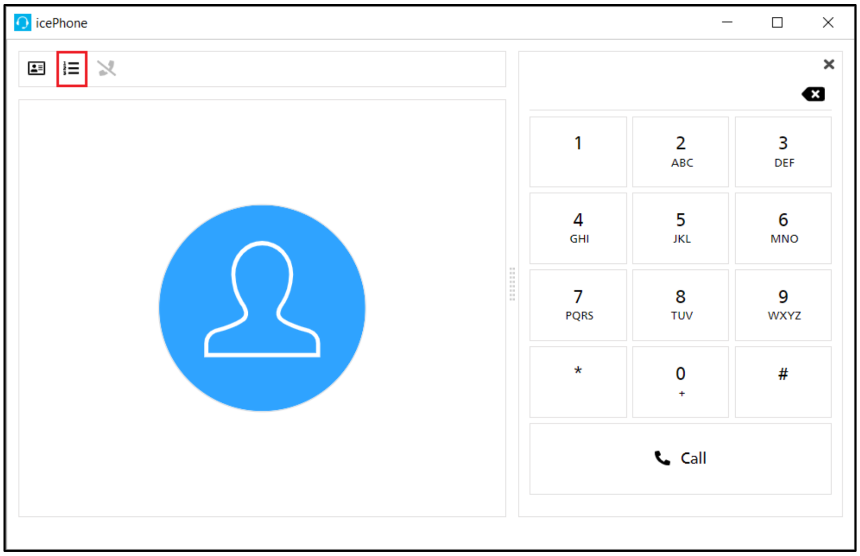
The *Contact Data* button displays information about your contact including the Contact ID, State, Originator Name and Address, Target Name and ID, Receiving Address and User Data.



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

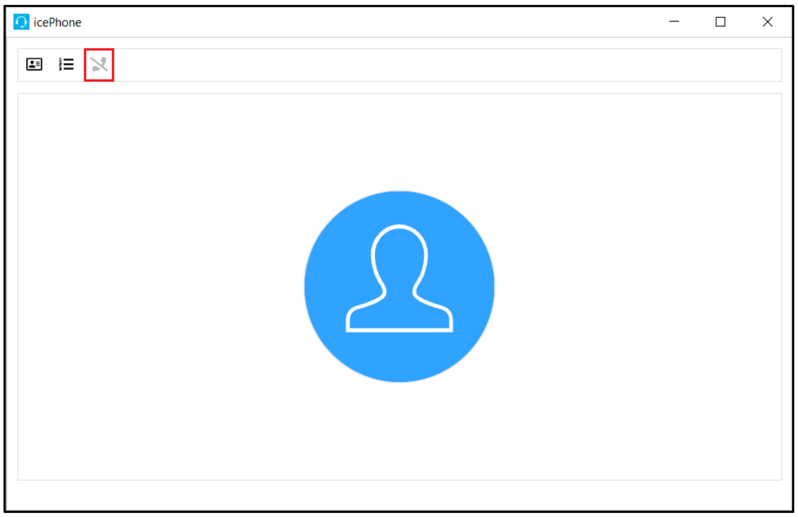
The *Dial Pad* button opens the icePhone dial pad. You can dial a number and click the Place call button on the bottom of the dial pad.



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 173.

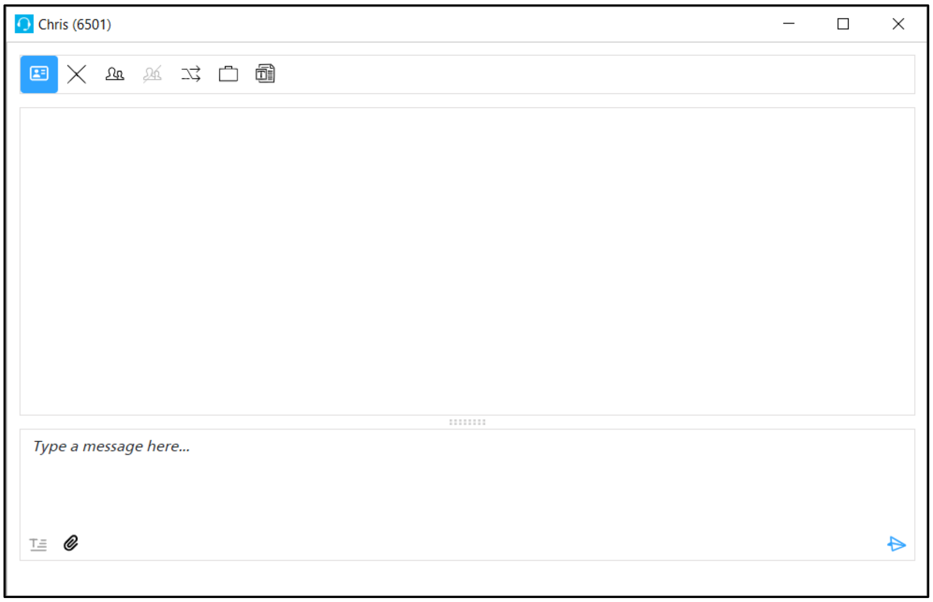


To close this tab, either click on the button again, or click on the ‘x’ in the top right corner of the screen.

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 is 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.

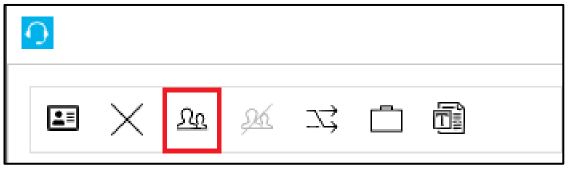
Note: Your profile must be configured for IM handling in order to be able to use the buttons for the icePhone for Chat.

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 174.

Consult

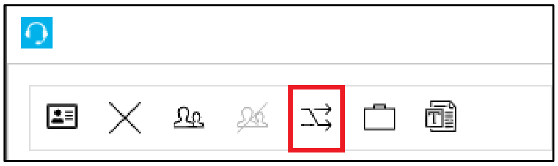
There may be occasions when you wish to consult a third party while you are handling an IM. Perhaps you need assistance with a customer or would like to confirm something with a supervisor. To do this, you can use the Consult button.



For more information on the Consult/End Consult button, please refer to icePhone for Chat contacts on page 176.

Transfer

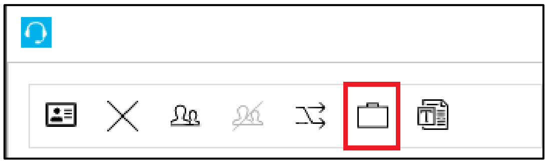
There may be occasions when you wish to transfer an IM to a different queue or user. To do this, you can use the Transfer button.



For more information on the Transfer button, please refer to Transfer with icePhone on page 228.

LOB (Line of Business)

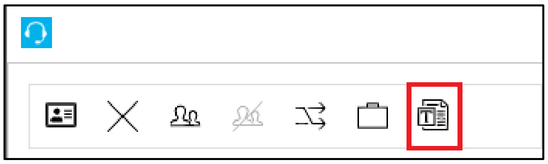
You may be asked to tag contacts with one or more Line of Business Codes. The codes are a way of categorizing the contact, based on the nature of the contact. To do this, you can use the LOB button.



For more information on LOB codes, please refer to Using LOBs with icePhone on page 280.

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.



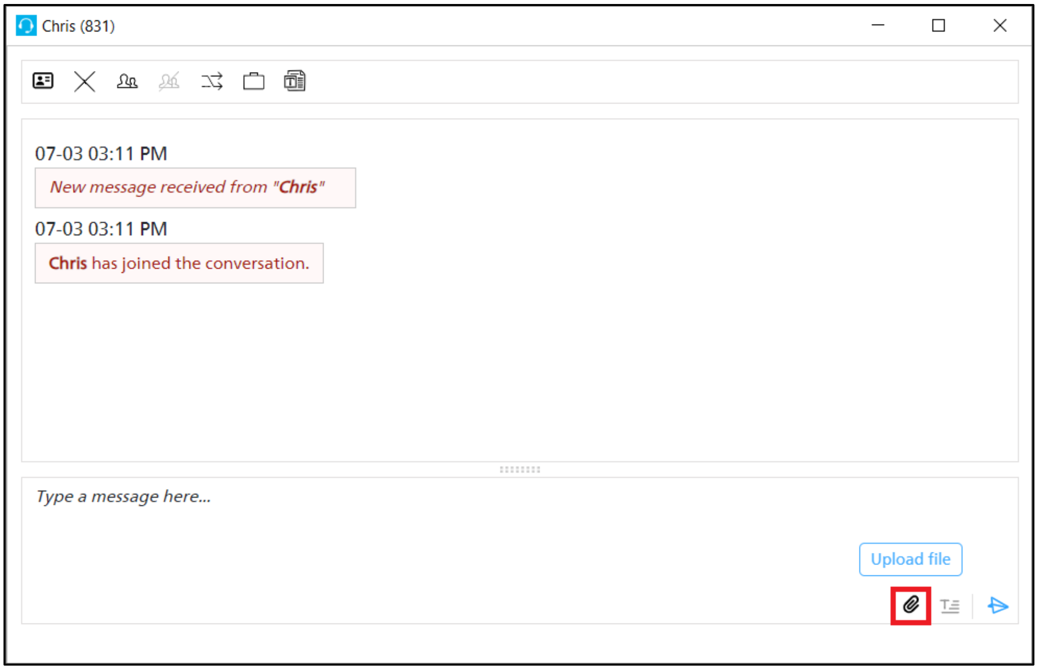
For more information on the configuration of Canned Responses, please refer to Using Canned Responses with icePhone on page 239.

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

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 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 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 will open the file explorer window on your local machine.

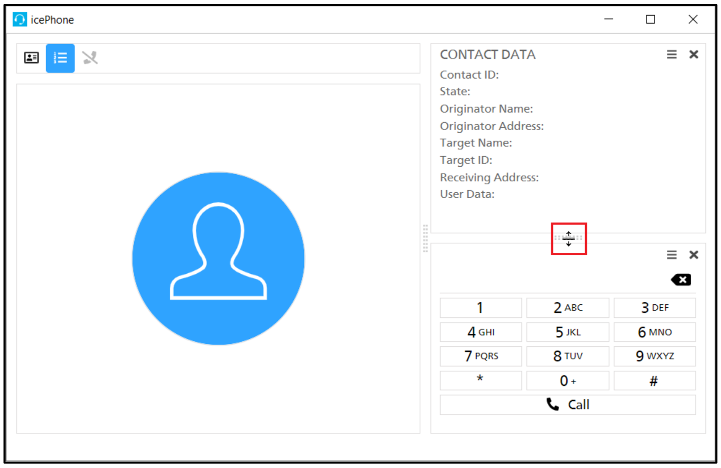
on page 242.

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

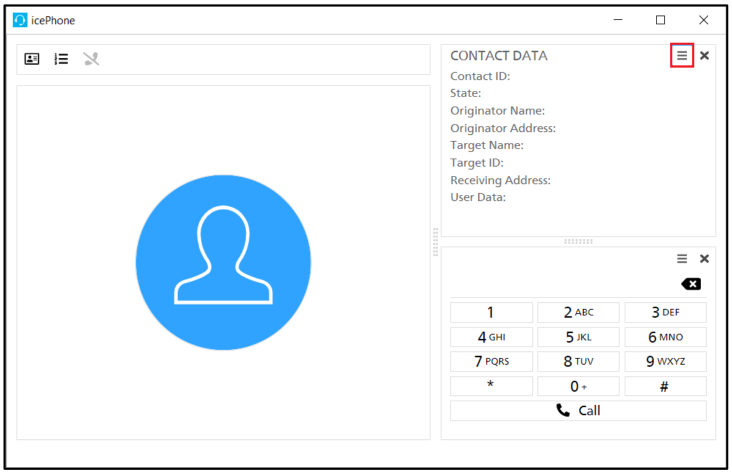
To resize a tab, you can click and drag the edges of the tab to your desired size.



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.

Chapter 7: Handling Contacts

This chapter provides a general description of how users can access the different features of iceBar to handle contacts. Features of iceBar are customizable. All features discussed in this manual may not be included with your configuration of iceBar.

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: While this chapter primarily references the buttons on the iceBar toolbar, be aware that the buttons in the System Tray icon menu provide the same functionalities.

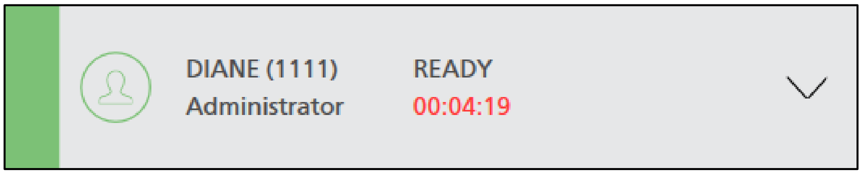
Ready, Not Ready, Wrapup, On Contact, Pending State

Once you have logged on, iceBar automatically places you in either the Ready state or the Not Ready state, depending on the configuration of the user profile. The *Sidebar* on iceBar allows you to toggle between the Ready, Not Ready, and Pending state:

- When you are in the Ready state, the *Sidebar* displays a green background. In this state, you must be prepared to handle a queued contact. You may change yourself to Not Ready state, even while on a call, by clicking the *Sidebar* and selecting a Not Ready reason.
- When you are in a Not Ready state, the *Sidebar* displays a red background. In this state, you cannot receive any queued calls. Direct calls will be parked in your PAQ.

Ready

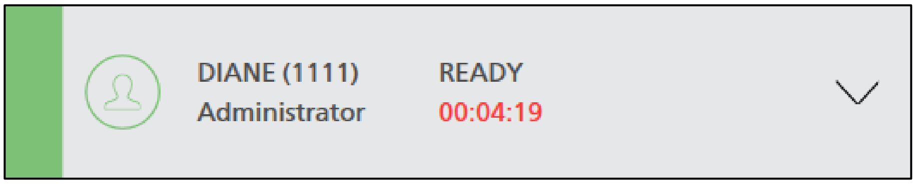
To toggle from the Not Ready state to the Ready state, click the *Sidebar*. The background changes from red to green. You are now in a Ready state.



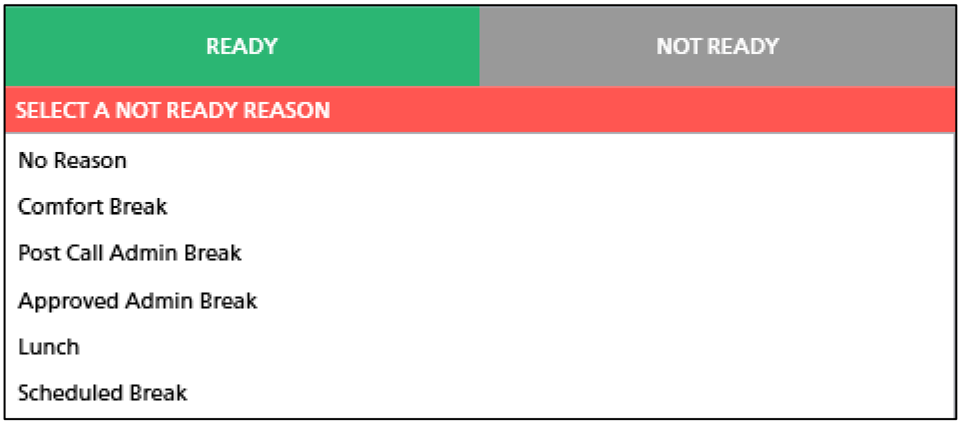
Not Ready

To toggle from the Ready state to the Not Ready state:

1. Click the *Sidebar* on the toolbar.



2. You will now either be in Not Ready state, or you will see the following dialog box if your contact center has chosen to use Not Ready Reasons:



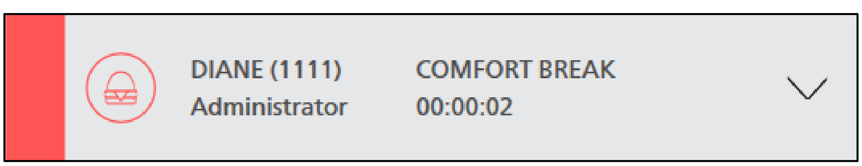
Note: The 'Not Ready Reason' dialog box that has been configured for your contact center may look different from the one shown above.

Not Ready Reasons

1. From the 'Not Ready Reason' dialog box (pictured above), click the button that best represents the reason that you are entering the Not Ready state. There are four default Not Ready reasons: Comfort Break, Approved Admin, Post Call Admin, and Other.

   Once you choose a reason, the color in the sidebar changes to red, indicating that you are currently in the Not Ready state.

   The reason that was selected will appear in the State section as shown in the screenshot below:



2. While you are in the Not Ready state, you can right-click the *Sidebar* and select a new Not Ready reason, if required.

Note:

- The Not Ready reason that you currently have selected will appear greyed out.

- Users with Team Lead access level or higher can modify Not Ready Reasons in iceManager settings. For more information, refer to the iceManager User Manual.
- The 'Not Ready Reason' dialog box does not appear if an ice Administrator has disabled this feature. In this scenario, you enter the Not Ready state immediately upon clicking the green Sidebar. For more information, refer to Appendix A: Global Settings.

Wrapup

If the ice Administrator has enabled the Wrapup feature, users are automatically placed into Wrapup state after each queued call. Wrapup state 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 queue, similar to when users are in the Not Ready state. However, there are a few factors that make the Wrapup state distinct from the Not Ready state:

- The sidebar is amber – when it appears, it indicates that the user is currently in the Wrapup state.
- Wrap up time is calculated separately from Not Ready state time on reports.
- A timer can be set for Wrapup state. For example, users might automatically be placed into the Ready state after 20 seconds of wrap up time. Wrap up time can also be set to infinite, meaning that users do not return to a Ready state until they click the *Sidebar*.
- 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 is calculated for the original queue.
- Wrapup state is only an option when the ice Administrator enables the feature.
- If your contact center uses Forced LOBs, you may enter them during Wrapup state.

Once in the Wrapup state after ending a call, you may go to the Ready or Not Ready state.

1. To enter the Ready state, click the sidebar. The sidebar will change to green, indicating that you are in the Ready state.

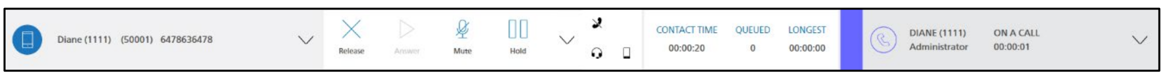
OR

2. To enter the Not Ready state, right-click the sidebar and select a Not Ready Reason, if required.

   Note: If a timed Wrapup state has been defined in iceAdministrator, you will enter the selected Not Ready state when the timer expires. If the Wrapup state is infinite, you enter the selected Not Ready state immediately. For more information on configuring Wrapup state, 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.



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

Call

When you receive a call from ice, you are automatically placed in an On Call state:

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

The buttons in the Contact Functions Panel that are available to be used in the current state will show as active..

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

Email and Social Media

When you receive an email message or social media post from ice, you are automatically placed into the Email state:

- The sidebar turns blue and the state changes to On Email.

- Email time, although calculated separately on reports, is similar to on call time.

For more information on receiving email messages from ice, refer to page 209.

When you are finished with your email, depending on the configuration, you may be placed in a Wrapup, Not Ready, or Ready state.

IM, Social Media Message and SMS

When you receive an IM, social media message, or SMS from ice, you are automatically placed into the IM state:

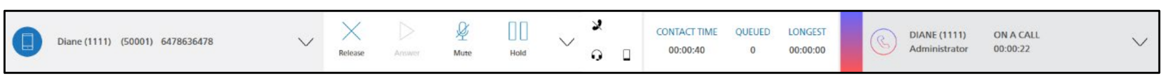
- The sidebar turns blue and the state changes to On IM.
- IM time, although calculated separately on reports, is similar to on call time.

For more information on receiving instant messages from ice, refer to page 233.

When you are finished with your instant message, depending on the configuration, you may be placed in a Wrapup, Not Ready, or Ready state.

Pending State

While on a contact or in a Wrapup state, a user may choose to be in a Pending Not Ready or Pending Logged off state. When the contact is released, the user will be put into Not Ready or Logged off state.



To toggle into a Pending Not Ready state:

1. While on a call, click on the State Sidebar.
2. Select a Not Ready Reason.

To toggle into a Pending Logged Off state:

1. While on a call, click on the User Panel.
2. Select Log In
3. Toggle off Log in to ice.
4. Click Apply

Note:

- You may only put yourself into a Pending state if you are on an active call.
- If you wish to change your Not Ready Reason, you can change it again by clicking on the State Sidebar.

Receiving a Call

To receive a queued or direct call, you must be in the Ready state. In the instructions below, the following 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).

The way that you answer a call with iceBar depends on the configuration of your contact center. Two options are available:

- Answer a call with the *Answer* button.
- Answer a call without the *Answer* button.

The sections that follow explain how to answer a call using each of these methods.

Answering with the Answer Button

ice can be configured so that users must press the *Answer* button before they are connected to the caller. If this is the case for your contact center, iceBar plays a beep in your headset to indicate that you are being presented with a call. To be connected with the caller, press the *Answer* button on iceBar.

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 upon picking up the handset. Instead, you are automatically connected to the caller.
- You can also answer a call through the Toast Window if it is configured in your Notification Options. For more information, refer to page 81.
- If icePhone is configured for the user, the icePhone window will not automatically open after clicking the *Answer* button on iceBar. You can still 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.

Answering without the Answer Button

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

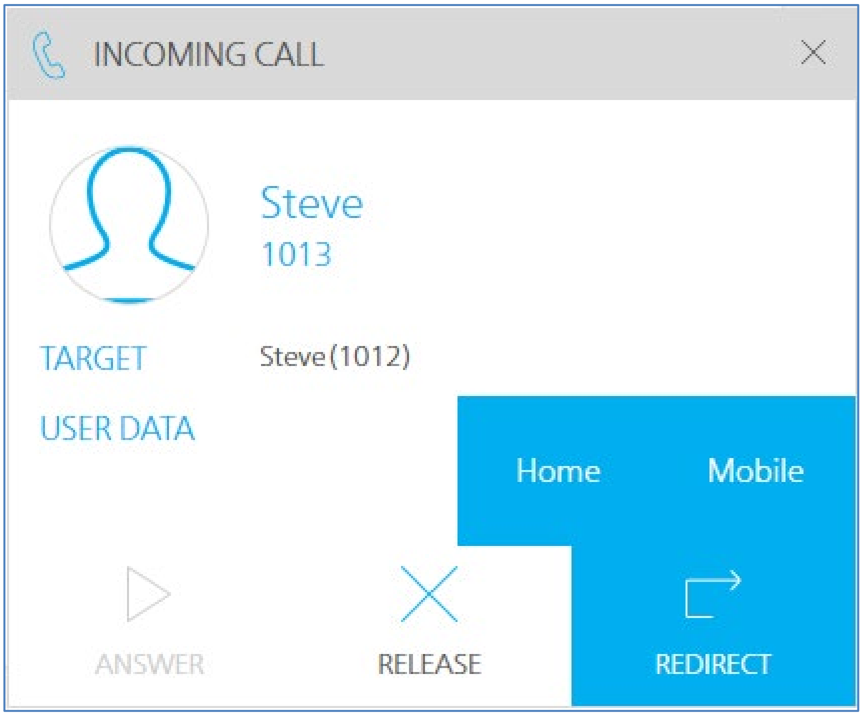
Caution:

- 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.

Redirecting a Call

When a call alerts at your workstation, you have the ability to redirect the call to another number/destination, based on the information you receive through the Toast Window.

If you have configured the Toast Window in your Notifications options, you will receive a pop-up window in the lower right portion of your screen when presented with a contact. For more information on Notifications options, refer to page 81.



From this window, you can select the *Answer* button, the *Release* button, or you can choose from a list of redirection destinations.

Note:

- The redirection destinations must be set up prior to receiving the call. For more information on redirection destinations, refer to Configuring Call Options on page 89.

- If you are configured as an on-hook user, you will have to click both the iceBar toast notification and the Microsoft Teams toast notification to answer a call or answer an IM.

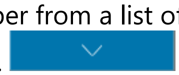
Placing a Call

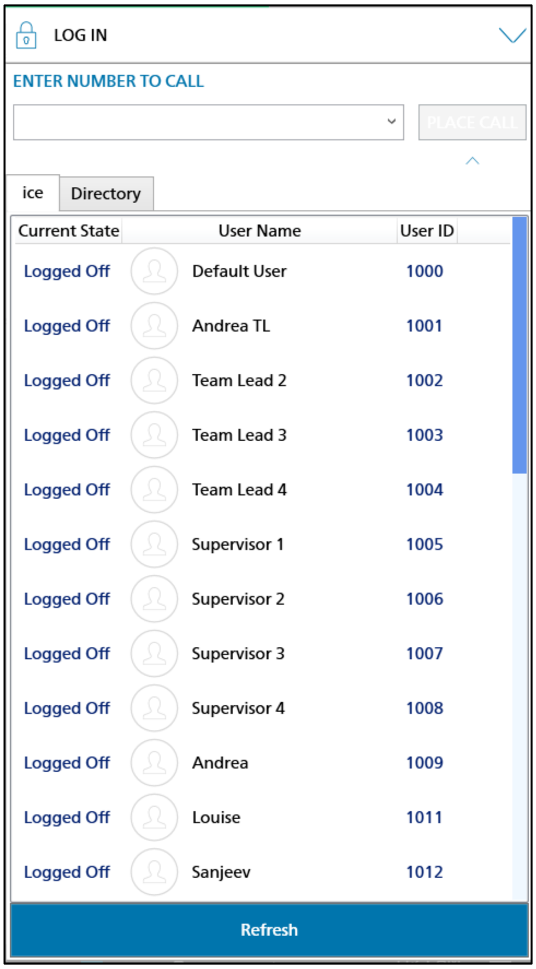
To place a call:

1. Click the *Place Call* button on iceBar.

   The 'Enter number to call' dialog box appears.

2. Enter the number that you wish to call. You may use spaces or hyphens, but they are not necessary. Click *Place call*.

   Alternatively, you may select a number from a list of available users. To view a list of available users, click on the drop-down menu. 



Note:

- The place call button will be disabled if you are in the monitoring state.
- Users can use the 365 tab to search for their O365 contacts, however this requires additional set up and configuration.
- If icePhone is configured for the user, the icePhone window will not automatically open after clicking the *Place Call* button on iceBar. If you need to open the icePhone window, click the *Show icePhone for selected contact* button on your iceBar.

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.

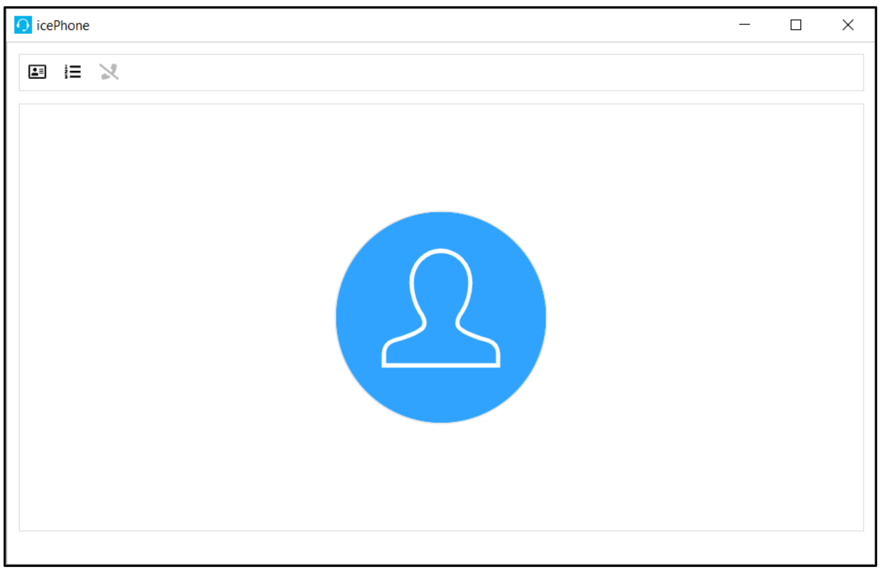
Note: You must have the 'Use icePhone' box enabled in order to be able to use the icePhone.

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.

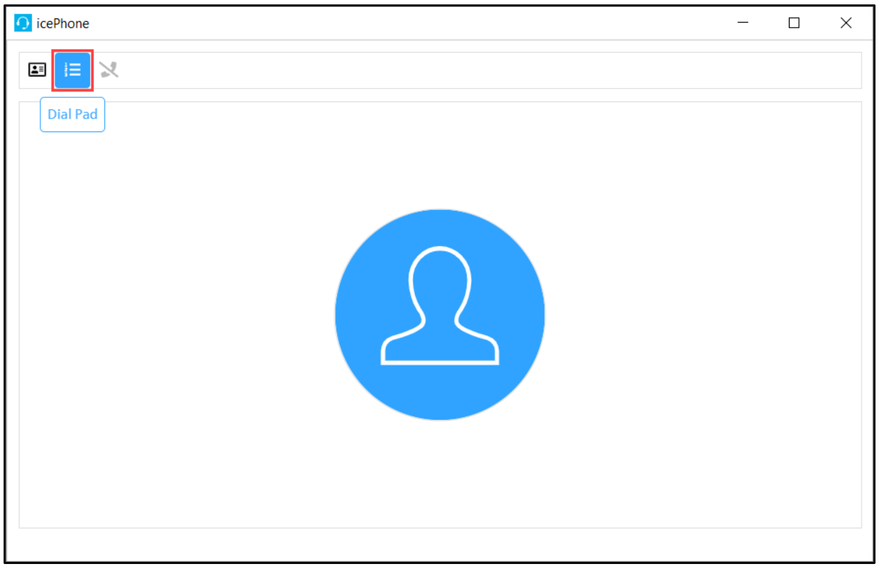
To place a call using the icePhone dial pad:

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

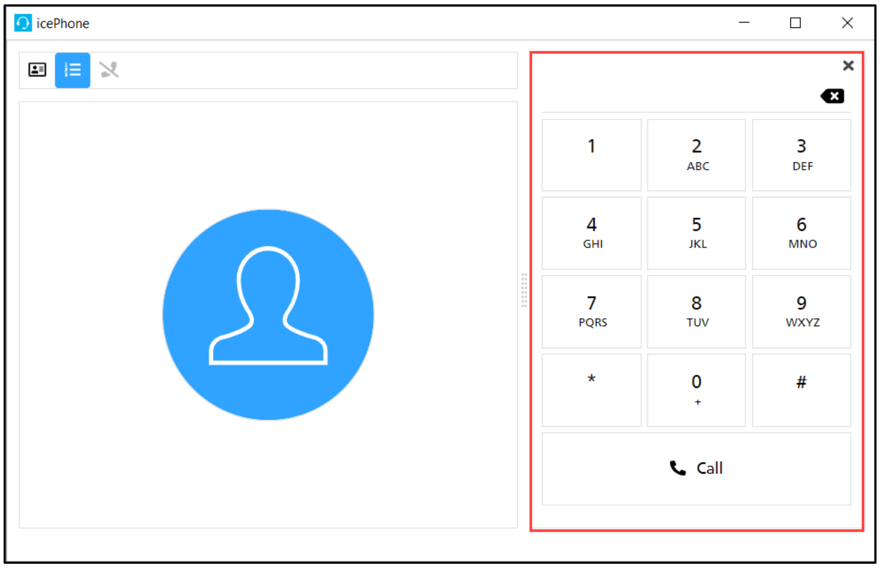
   The icePhone window will open.

2. Click the *Dial Pad* button.



The Dial Pad tab will open.



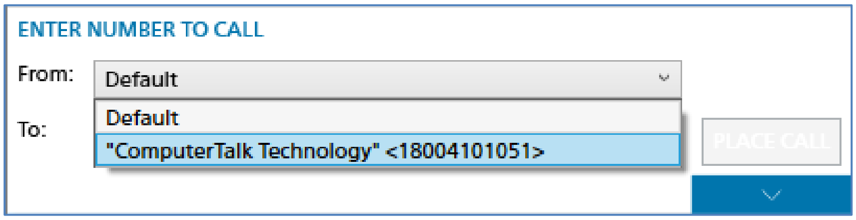
3. Enter the number that you wish to call by pressing the buttons on the dial pad. Click the *Call* button.

<u>Outbound Presentation</u>

Users will have the option to select an Outbound Display when initiating an outbound call. This option is only available to users whose iceBar has been configured for this feature.

To select outbound display details for an outbound call:

1. Click the *Place Call* button.
2. Use the From drop-down menu to select the outbound display you want to use for your outbound call.



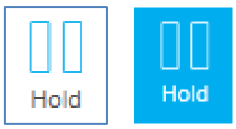
3. When you initiate your call, your caller's display will show the selected option.

Note:

- Multiple Outbound Display options can be configured.
- Configuration of the Outbound Display options is done in the iceBar configuration.

Placing a Caller on Hold

The *Hold* button becomes available when you are on a call. To place a caller on hold, click the *Hold* button on iceBar. When the Hold button is enabled, the button turns blue as shown in the image below:



The ‘State’ field displays the text “Holding Call” and a double-beep is heard in your headset, as a reminder, approximately every ten seconds. The caller hears ice music while on hold.

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

You can also use the PAQ window to place a caller on hold. Right-click the active contact. From the menu that appears, select Hold. For more information, refer to Chapter 4: Personal Access Queue

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. The Release Call key is also used in conjunction with the Consult feature of iceBar. For more information, refer to page 257.

You can also use the PAQ Window to release a call. Right-click the active contact. From the menu that appears, select Release Call. For more information, refer to Chapter 4: Personal Access Queue

Releasing a Call with icePhone

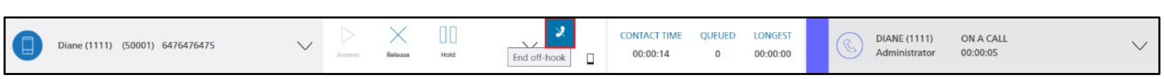
You can also release a call from the icePhone.

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 panel.



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.

Silent Monitoring

Silent Monitoring is a feature of ice that allows Team Leads, Supervisors, and Administrators to monitor ongoing telephone and chat conversations on the ice system. If you have the Silent Monitoring Notification class of service feature enabled for your user profile, the *Silent Monitor* button on the iceBar turns red while you are being monitored. The Silent Monitoring Privilege feature determines whether or not you 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 'User ID to Monitor' dialog box appears.

2. Enter the User ID of the user that you wish to monitor. You may click on the ellipsis button  to see a list of users and their states.

3. Click *Monitor* to monitor the user. When you are monitoring a user, the *Silent Monitor* button will turn dark blue.
4. Depending on your configuration, you may be notified when you are being silently monitored. In that scenario, your *Silent Monitor* button will turn red.
5. 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 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.

- Remote users - 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.
- The silent monitoring button will be disabled when placing a call or in wrap-up mode.
- The place call button will be disabled when in monitoring state.
- 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.

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:

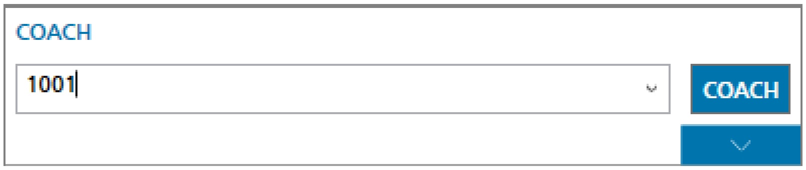
<u>While Silent Monitoring a user:</u>

1. Click the *Coach* button on iceBar. Your *Coach* button will turn dark blue, indicating that you are coaching the user. If a user has the Silent Monitor Notification COS enabled, a user's *Coach* button will turn red when they are being coached.

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

1. Click the *Coach* button on iceBar.

   The 'User ID to Coach' dialog box 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 *Coach* to communicate with the user while they are on a contact. Your Coach button will turn dark blue, indicating that you are coaching a user.
4. If a user has the Silent Monitor Notifcation COS enabled, a user's *Coach* button will turn red when they are being coached.

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.
- Remote users - 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 coach button will be disabled when placing a call or in wrap-up mode.
- The conference button will be disabled after you barge-in.

Record Call

The call recording feature is available through settings on the iceManager site, which is part of the ice product suite; the recordings are available in iceJournal. If you have purchased this product and have the Record Call class of service feature enabled in your iceAdministrator profile, you can use the Record Call button on iceBar to allow you to initiate a recording of the active conversation.

<u>To record a call:</u>

- While on a call, click the *Record Call* button. The button will turn red.
- ice will record until the call ends. You may interrupt the recording using the Recording Privacy Mode feature described on page 208.

Note:

- Once recording has started for a call, it will continue until the call has ended.
- If only voice recording is enabled in iceManager, then clicking the record button will only record voice. If only screen recording is enabled in iceManager, then clicking the record button will only record the screen. If both are enabled in iceManager, then clicking the record button will record both voice and screen.

- This button may turn red if your conversation is being recorded, depending on your contact center's configuration. This button will turn red if you initiated the recording. If you drag your mouse over the flashing button, a pop-up tool tip will appear telling you the reason (e.g., Random Recording or Queue Scheduled) for the recording.
- If the Recording Error Notification class of service feature has been enabled for your user profile, you will see a pop-up message box if a recording error occurs. The error message will tell you what went wrong.
- If you initiated the recording, you will see the error message if there is a recording error, regardless of whether or not the Recording Error Notification class of service is enabled for your user profile.

Record Screen

Screen Recording is available through settings on the iceManager site, which is part of the ice product suite; the recordings are available in iceJournal. If you have purchased the licensing for this product, have screen recording configured in iceManager, and have the appropriate Proxy Network software installed on your computer, you can use the *Record* button to initiate a recording of the active conversation. You must have the *Record* button on iceBar to use this feature.

To initiate screen recording:

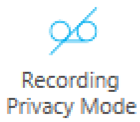
- While on a call, click the *Record* button. The button will turn red.
- ice will record until the call ends. You may interrupt the recording using the Recording Privacy Mode feature described on page 208.
- To end screen recording, click the *Record* button.

Note:

- If only voice recording is enabled in iceManager, then clicking the record button will only record voice. If only screen recording is enabled in iceManager, then clicking the record button will only record the screen. If both are enabled in iceManager, then clicking the record button will record both voice and screen.
- The Proxy client required for screen recording can be installed when you first install iceBar.
- By default, the Proxy client will emit a beep noise whenever a screen recording is started or stopped.

- The *Record* button may turn red if your conversation is being recorded, depending on your contact center's configuration. This button will always flash if you initiated the recording. If you drag your mouse over the flashing button, a pop-up tool tip will appear telling you the reason (for example "Random Recording" or "Queue Scheduled") for the recording.
- If the Recording Error Notification class of service feature has been enabled for your user profile, you will see a pop-up message box if a recording error occurs. The error message will tell you what went wrong.
- If you initiated the recording, you will see the error message if there is a recording error, regardless of whether the Recording Error Notification class of service is enabled for your user profile.
- Screen recordings can be scheduled through iceManager. For more information, refer to the iceManager User Manual.

Recording Privacy Mode



The recording of a call can be interrupted using the Recording Privacy Mode feature. This feature allows a user to collect sensitive information such as credit card numbers, while ensuring compliance with privacy regulations.

To activate/deactivate Recording Privacy Mode:

1. While recording a call, enable *Recording Privacy Mode* by clicking on the button.
2. The icon will turn blue, indicating that privacy mode is enabled.
3. To disable Recording Privacy Mode so that normal recording can resume, click on the blue icon.

Note:

- If a user is on recording privacy mode and they consult another user, the consultation leg of the call also respects this recording privacy mode setting and will not be recorded.
- If a user answers a call with recording privacy mode already turned on, the call will not be recorded.
- If recording privacy mode is turned on for a user and the call is not answered by that user but subsequently answered by another user, the call will respect the recording privacy mode setting for the user who answered the call.

Receiving an Email or Social Media Post

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 queue.

When a user is handling an email or social media post, he or she enters the On Email state, and ice does not direct any additional contacts to the user. The user stays in the On 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 emails or social media posts, this occurs when an email or social media post is routed to the user who previously handled the message.

When a user is handling a contact or in the Not Ready state, direct emails or social media posts can wait in the user's Personal Access Queue (PAQ), which is a holding place for direct contacts.

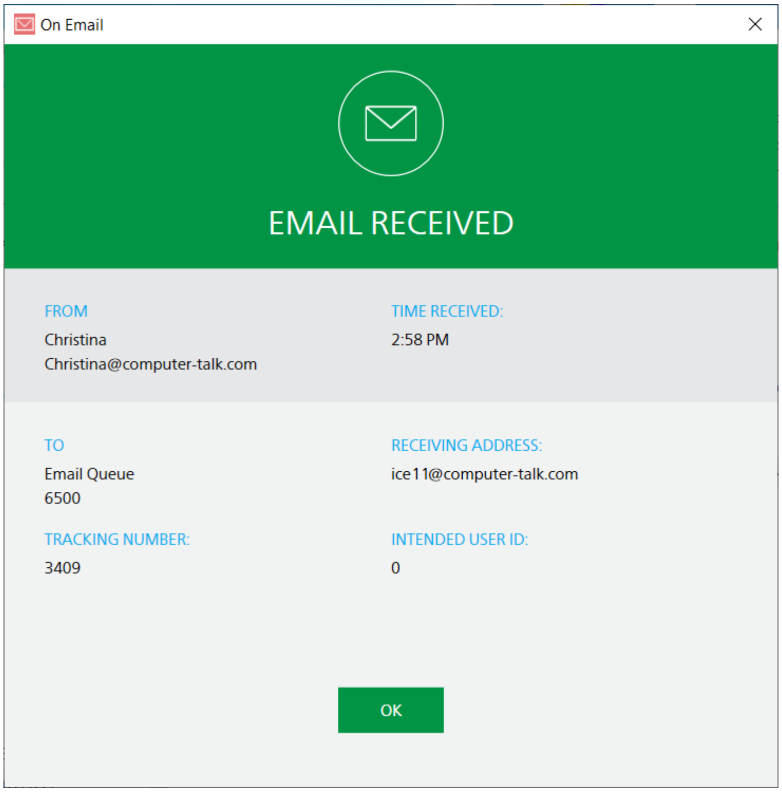
ice can be configured so that emails and social media posts sent to a particular address are queued to a selected group of users. For example, your contact center may receive messages through support@widgets.ca. These are directed to the first available user in the Support email queue.

These users can either be 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 or social media post 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. 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.

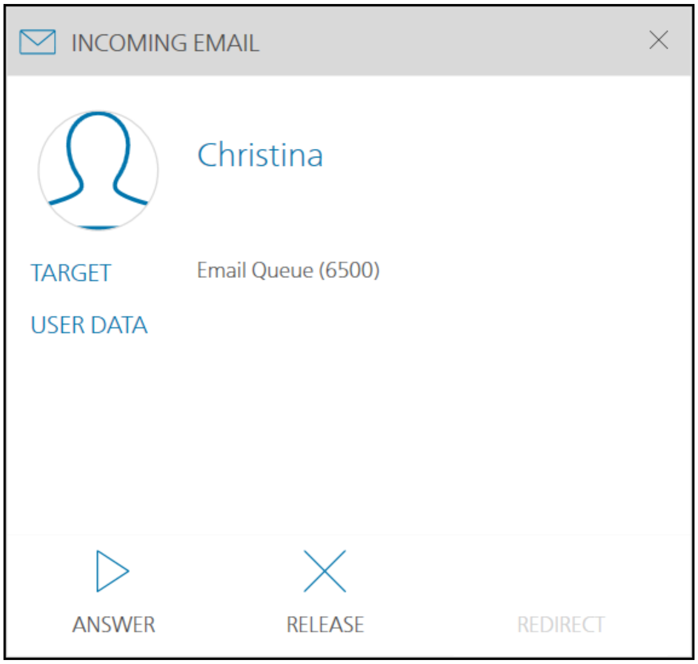
Users are notified of an incoming email with the 'Email Received' window, as shown below.



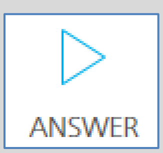
The fields displayed on the 'Email Received' window are described in the table below.

Email Received	
Field	**Description**
From	The name and email address of the message sender.
Time Received	The time that the message was sent from ice to the user's email address.
To	The name and four-digit ID of the queue to which the message has been directed.
Receiving Address	The email address to which the message has been sent.
Tracking Number	A unique number associated with the email thread, which includes a sender's original message and any subsequent responses.
Intended User ID	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.

Users are also notified of an incoming email with the ‘Incoming Email’ dialog, as shown below.



The table below describes the fields displayed on the ‘Incoming Email’ dialog box.

Incoming Email	
Field	**Description**
Target	The email queue to which the message has been sent.
User Data	Any data that the workflow wants to pass on.
	‘Answer’ button. When the user clicks it, ice routes the email to the user’s inbox. **Note:** If you have the Auto Answer Email or IM class of service enabled, this button will be disabled.
	‘Release Call’ button. Clicking on it sends the message back into the queue if you have Auto Answer disabled.

Incoming Email	
Field	**Description**
	This option is greyed out. You cannot redirect incoming emails. This button is only used for calls

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.

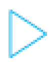
Receiving an Email Message from an Assigned Queue

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 users 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 *OK* on the 'Email Received' window.

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

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

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, click the *Sidebar* to remove yourself from the On Email state.

   Note: Depending on your configuration, your state may be automatically switched to Ready state after a predetermined amount of time.

   You may also click on the User Panel, and select the *Not Ready* button from the drop-down to move to the Not Ready state.

Note:

- 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 put yourself Ready state 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*.

Picking an Email Message from a Queue

A contact can be picked out of a queue from which you do not normally handle contacts. Picking queued email messages may be useful in contact centers that want to handle email messages only when they are not busy with calls. Each method of receiving queued email messages is described in the sections that follow.

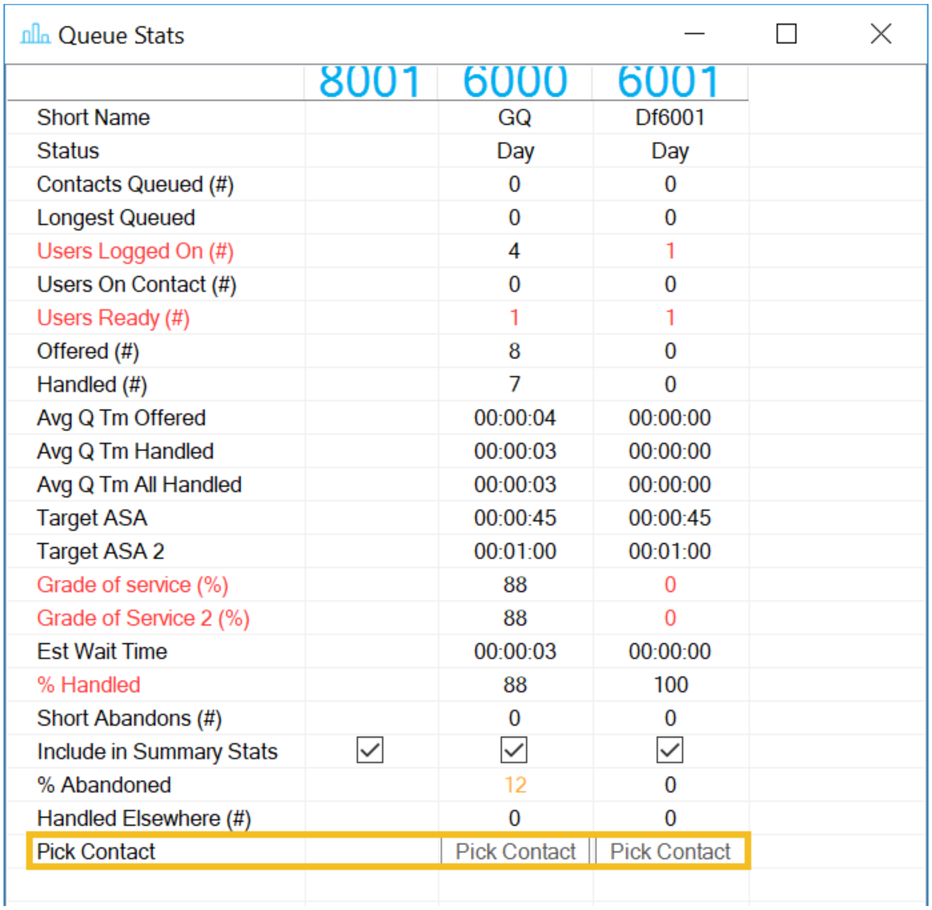
For example, you might be a customer service user that only takes calls from a customer service queue. When the customer service queue is less busy, you may notice email messages are waiting in the customer service email queue (to which you are not assigned), and you may pick the longest waiting email message from that queue.

There are two ways in which this can be accomplished:

- Through the Queue Statistics window in iceBar
- Through the Pick Contact button in iceBar.

To pick a contact from a queue using the Queue Statistics window:

1. Open the Queue Statistics window in iceBar.



Queue Stats

	8001	6000	6001
Short Name		GQ	Df6001
Status		Day	Day
Contacts Queued (#)		0	0
Longest Queued		0	0
Users Logged On (#)		4	1
Users On Contact (#)		0	0
Users Ready (#)		1	1
Offered (#)		8	0
Handled (#)		7	0
Avg Q Tm Offered		00:00:04	00:00:00
Avg Q Tm Handled		00:00:03	00:00:00
Avg Q Tm All Handled		00:00:03	00:00:00
Target ASA		00:00:45	00:00:45
Target ASA 2		00:01:00	00:01:00
Grade of service (%)		88	0
Grade of Service 2 (%)		88	0
Est Wait Time		00:00:03	00:00:00
% Handled		88	100
Short Abandons (#)		0	0
Include in Summary Stats	☑	☑	☑
% Abandoned		12	0
Handled Elsewhere (#)		0	0
Pick Contact		Pick Contact	Pick Contact

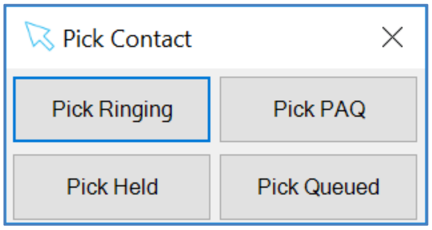
2. Locate the column that represents the queue containing the email that you wish to pick.
3. Click the *Pick Contact* button, located in the bottom row of that column.

   The Email Received window will appear. Refer to the section above for details on handling the email.

<u>To pick a contact from a queue using the Pick Contact button:</u>

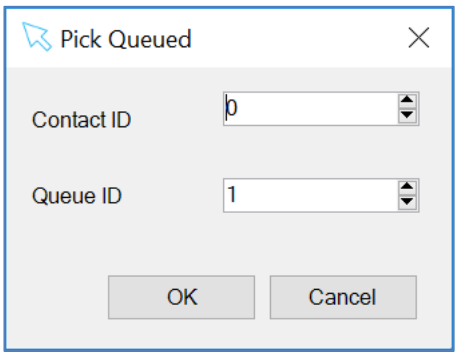
1. Click the *Pick Contact* button on iceBar.

   The 'Pick Contact' window appears.



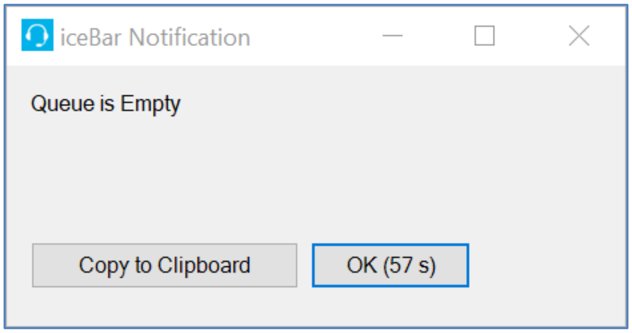
2. Click *Pick Queued*.

   The 'Pick Queued' window opens.



3. Use your PC's keyboard to enter the Queue ID of the queue from which you wish to pick a contact.
4. Click *OK* to be connected with the contact that has been waiting the longest in the queue that you specified.

5. If there are no contacts waiting in the selected queue, you hear a fast-busy signal and see the message below:



You can use the Queue Statistics window to determine if there are email messages waiting in the queue before using the Pick Queued feature. Refer to Chapter 5: Queue Statistics for more information on the Queue Statistics window.

Receiving a Direct Email

If user A is responding to a message, and the customer is sending a reply to user A's response, ice can be configured to direct the reply message to 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. If the user is logged on but in Not Ready state, the email will wait in the user's PAQ.

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.

A direct email message is placed into your Personal Access Queue (PAQ) if you are handling another contact or in the Not Ready state. Unlike callers, email messages are not subject to the PAQ Overflow setting. Therefore, an email message waits in your PAQ until it is answered. Depending on the state that you are in when the message enters your PAQ, you can retrieve the message using one of the following methods:

- If you are in Not Ready state when the message enters your PAQ, simply place yourself into the Ready state to receive the email message.
- If you are handling a call when the message enters your PAQ, you may use the Swap feature to Park your caller and receive the email message.
- If you are handling an email message when the message enters your PAQ, you must remove yourself from the Email state and enter the Ready state before you can

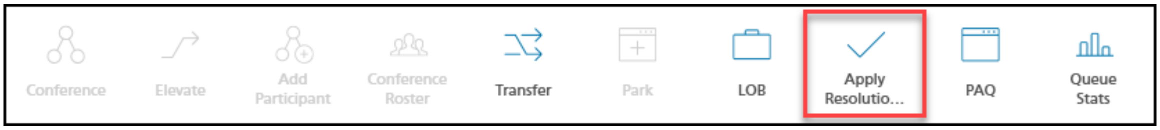
receive the waiting email message. For more information on the PAQ Window, refer to Chapter 4: Personal Access Queue

Email Resolution Codes

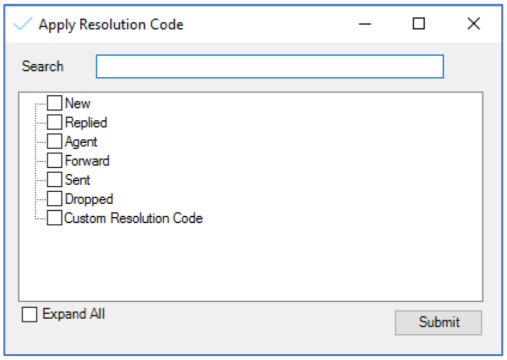
Users can attach Resolution codes to direct and queued emails that they are handling, using the Apply Resolution Code button in iceBar. The codes are tracked in iceReporting and are configured in the iceBar configuration files. Email Resolution Codes apply to direct emails as well as queued emails.

Selecting a Resolution Code:

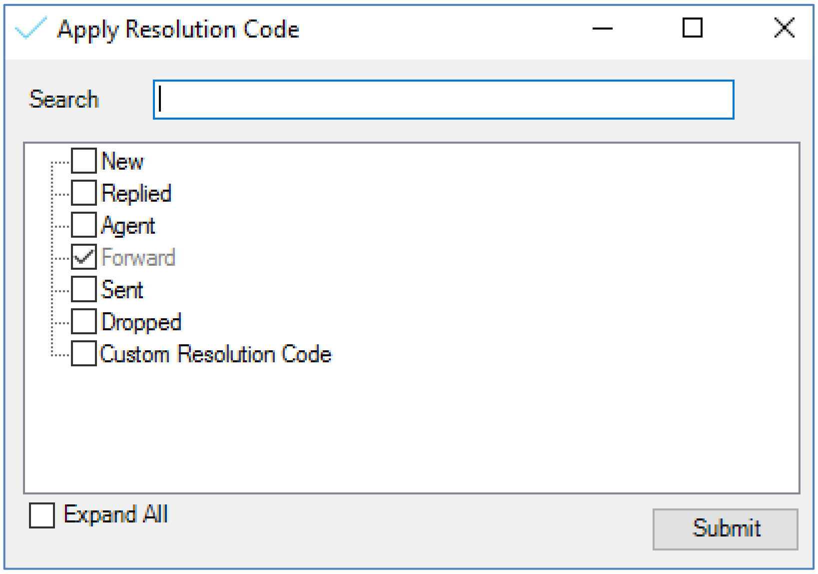
1. The Apply Resolution Code button is activated once the user accepts an email (i.e., goes into the On Email state).



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.



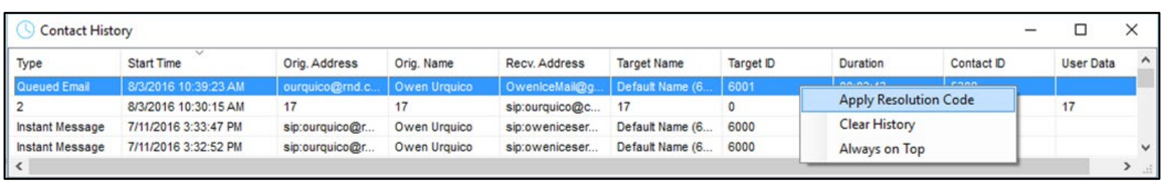
Note: If you accidentally clicked the wrong Resolution Code, you can overwrite your selection by clicking on another Resolution Code.

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

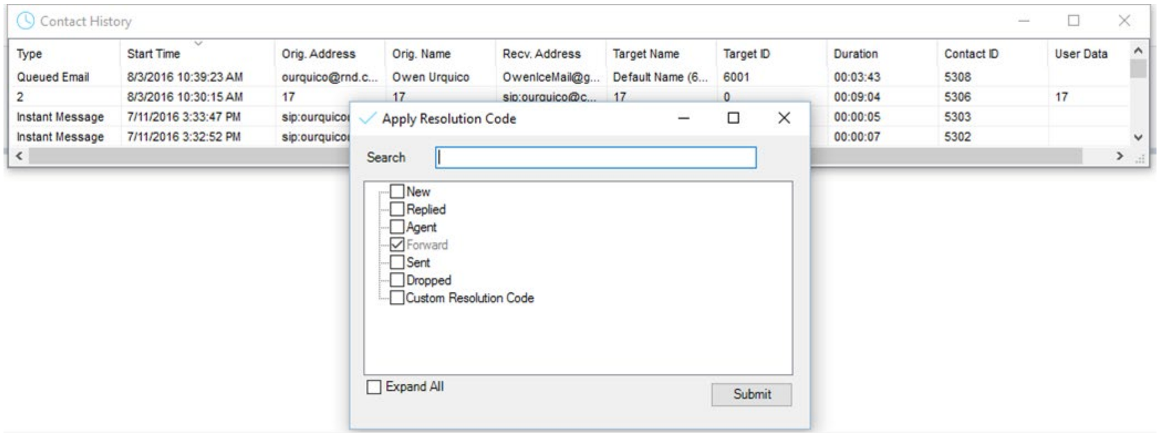
Note: If Force Resolution Code is enabled, users must select a resolution code before they can change their state to Ready. If Force Resolution Code is not enabled, users can change their state to Ready before they select a resolution code.

If Force Resolution Code is not enabled, users can go back to apply a Resolution Code.

1. From iceBar, open the Contact History window.
2. Find the Email interaction for which you wish to assign a Resolution Code.
3. Right-click on that entry and select *Apply Resolution Code*.



4. The Apply Resolution Code Window appears.



5. 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.

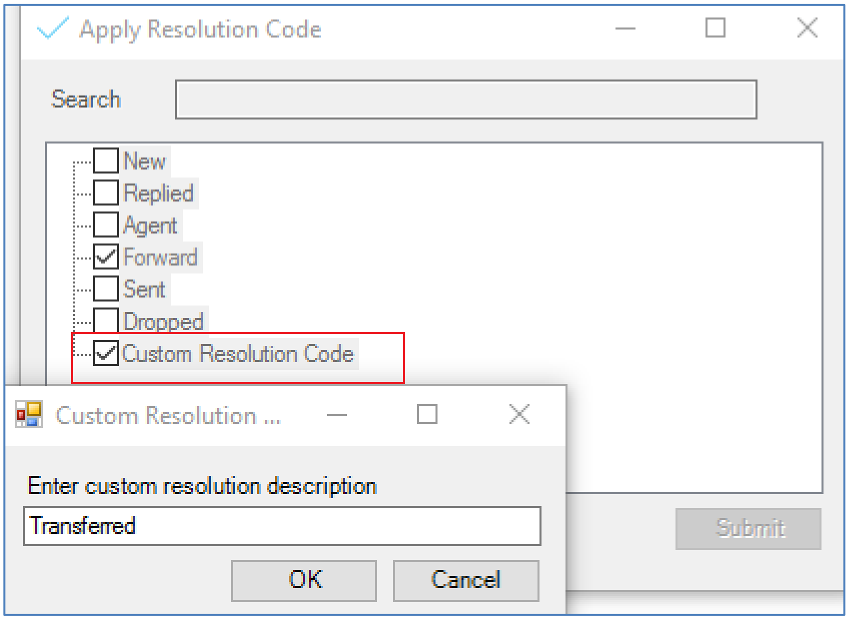
   The resolution code is attached to that email and the user can move onto the next contact in queue.

Creating your own codes

Custom resolution codes can be created by users with Team Lead access level or higher.

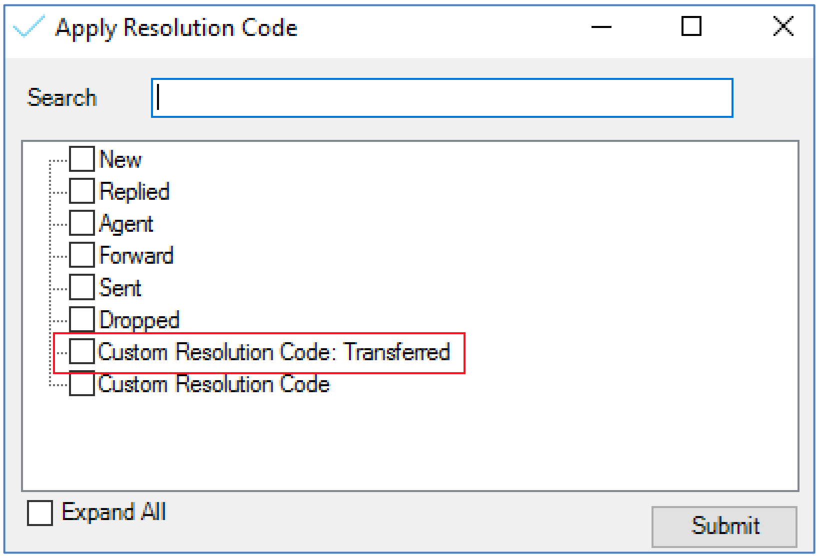
To create a new Resolution Code:

1. While in On Email state, select the 'Custom Option' checkbox. A window appears. In the example below, the user had selected Custom Resolution Code and typed in Transferred.



2. Fill in the field with the description of the code that you want to create.
   a. If you type in a Resolution Code that doesn't exist, a new one is created.
   b. If you type in a Resolution Code that already exists, iceBar will use the existing Resolution Code.

3. Restart iceBar and the Resolution Code will appear in the list.



4. Every user on the switch will see the new Resolution Code. The new resolution code is tracked in iceReporting immediately.

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 a Call or IM

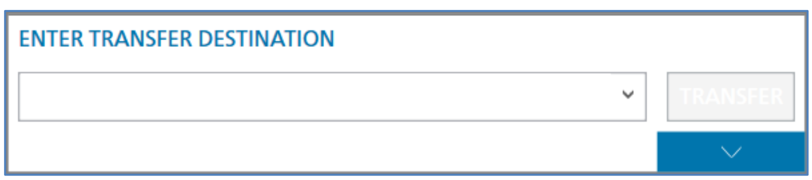
The *Transfer* button becomes available when you are on a call, IM or in the email state. This button allows you to perform a **blind transfer** to another destination, meaning that you do not have the opportunity to speak with the third party before they receive the contact that you are transferring. 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 257.

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

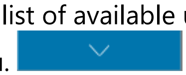
Note: The Transfer button is not available when you are in consulting or conferencing states.

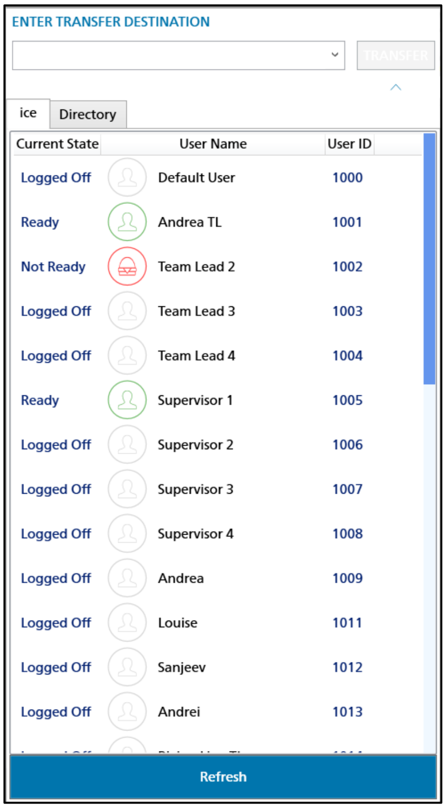
To transfer a caller:

1. Click the *Transfer* button on iceBar.
2. The 'Enter transfer destination' dialog box appears.



3. Enter the number to which you wish to transfer the caller. Be certain to include the area code. Click *Transfer*.

Alternatively, you may select a transfer destination from a list of available users. To view a list of available users, click on the drop-down menu. 
A dialog box appears:



4. Highlight the user to whom you wish to transfer the call, and click 'Place Call'.

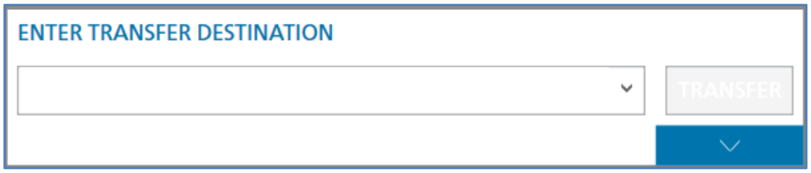
The original party is immediately transferred, and you are free to handle another contact.

You can also use the PAQ window to initiate a transfer. From the PAQ window, right-click the active contact and select Transfer from the menu that appears. For more information, refer to Chapter 4: Personal Access Queue

To transfer an IM:

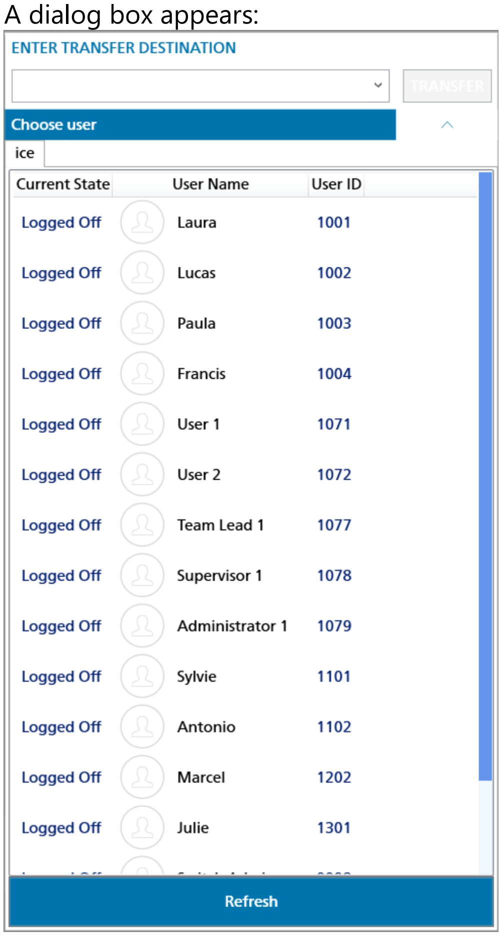
1. Click the *Transfer* button on iceBar.

The ‘Enter transfer destination’ dialog box appears.



2. Enter the SIP address to which you wish to transfer the IM. Click *Transfer*.

Alternatively, you may select a transfer destination from a list of available users. To view a list of available users, click on the drop-down menu.
A dialog box appears:



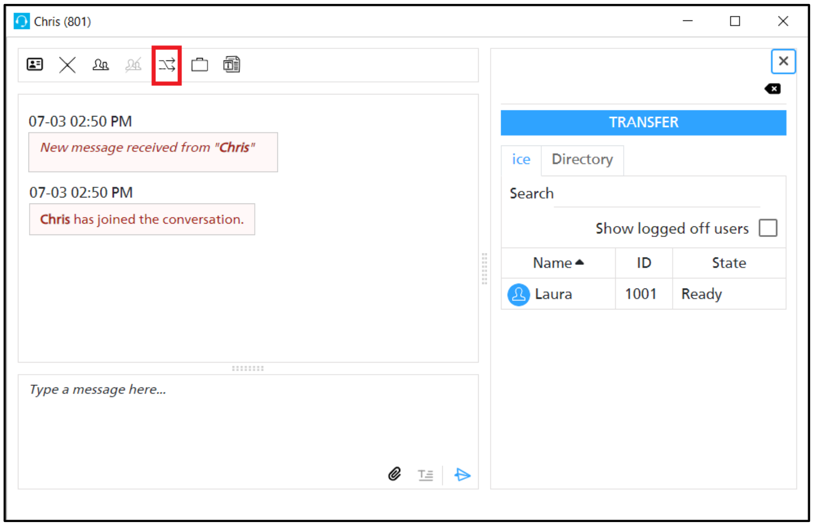
3. Select the user to whom you wish to transfer the IM and click *Transfer*.

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

Transfer with icePhone

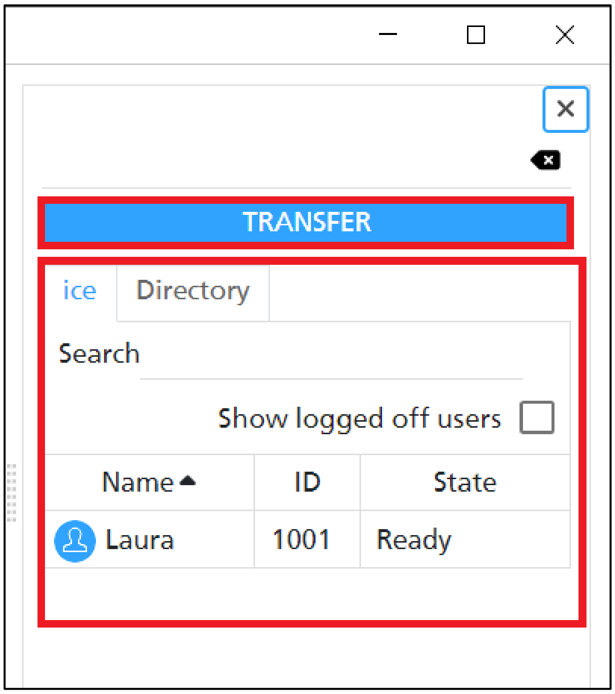
You can also use the Transfer button with icePhone. To do this, click the Transfer button on the icePhone chat client window.

While in the On IM state, click the Transfer button. The transfer tab opens on the right.



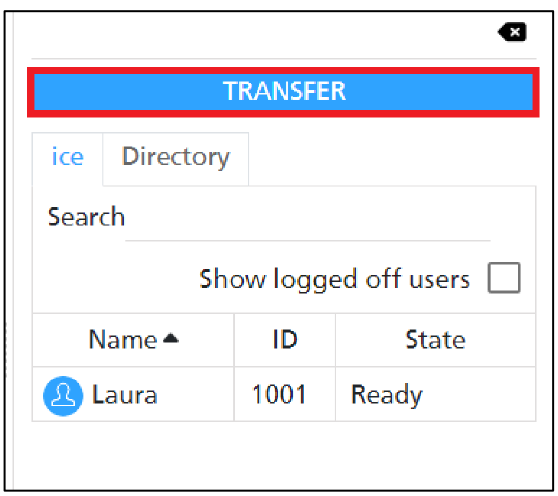
Enter the Queue ID, user ID, or SIP address you would like to transfer the IM to.

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.



Enable the 'Show Logged off Users' checkbox to see a list of users configured for your contact centre including logged off users.

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.

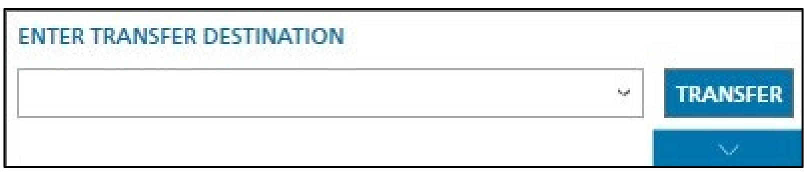
Transferring an Email

An active email received through ice can be transferred through iceBar 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 to the sales department. After the transfer is made the ownership of the email is also transferred to the next individual (i.e., when the sales user clicks reply on this email, they will be replying back to the customer, not to the person who forwarded the email).

To transfer an email to another iceBar user

1. While in the On Email state, click the transfer button on iceBar.

   The Email Transfer window appears.



2. Click on the ellipsis button (circled in red above) within the window to bring up a list of ice users who are email users.

   Note: Only users who are designated to handle emails through ice and who have email addresses configured will be displayed.

3. Select the user to whom you wish to transfer the email message by clicking on the appropriate row.

   Note: It is advisable to check the user's current state to determine whether or not to forward the email at this time.

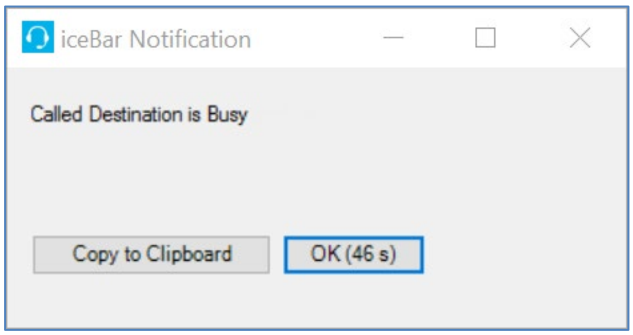
4. Click *OK*.
5. In the Email Transfer window, click *Transfer*.

   You are now put into Wrapup state or Ready state to handle the next contact, depending on your configuration.

Common Error Messages While Transferring an Email to an ice User

If the user to whom you are transferring an email is not in an appropriate state to receive the email, you may receive one of the following error messages and the transfer will not take place.

Called Destination is Busy

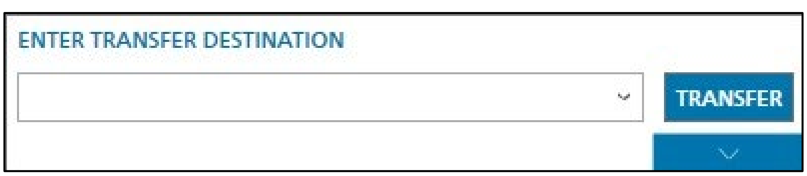


This error message will appear if you attempt to transfer an email to a user who is already in the email state.

To transfer an email to a Workflow DN

1. While in the On Email state, click the transfer button on iceBar.

   The Email Transfer window appears.



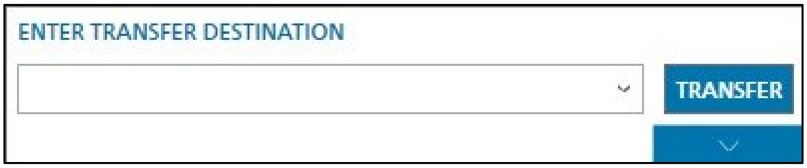
2. Enter the DN (dial number) of the workflow to which you wish to transfer the email.
3. Click *Transfer*.

   You are now put into Wrapup state or Ready state to handle the next contact, depending on your configuration.

To transfer an email to an external email address

1. While in the On Email state, click the transfer button on iceBar.

   The Email Transfer window appears.



2. Enter the email address to which you wish to transfer the email.
3. Click *Transfer*.

   You are now put into Wrapup state or Ready state to handle the next contact, depending on your configuration.

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. These are directed to the first available user in the Live Chat queue.

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

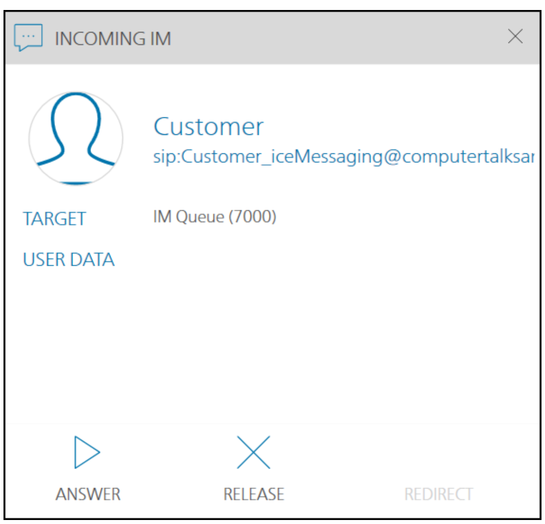
These users can either be regular users set up to handle multiple modalities or they can be dedicated IM users set up to only handle IM contacts.

If you are logged on to a queue that receives IMs, you are notified of an incoming IM with the 'Incoming IM' dialog box. The fields displayed in this dialog box are explained in the table that follows it. If you are off hook when the IM arrives, you will also be notified by a beep in your handset or headset.

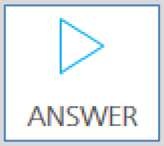
Note:

- If you have the Auto Answer Email or IM class of service, you will be presented with this 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.
- Users will receive web chats, social media messages, SMSs in the same client that they use to handle IMs.

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:



The table below describes the fields displayed in the 'Incoming IM' window.

Incoming IM	
Field	**Description**
Target	The IM queue to which the message has been sent.
User Data	Any data the IM sender may have entered.
	'Answer' button. Once you click this button, ice routes the SMS to your Microsoft Teams client. Clicking 'Answer' is only required if the Auto Answer Email/IM class of service is disabled.
	'Release Call' button. ice sends the message back to the queue.
	This option is grayed out. You cannot redirect incoming SMS messages.

<u>To handle the IM:</u>

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' dialog box.

   Notice the *Ready* button changes to indicate that you are in the IM state.
2. The Microsoft Teams client opens.

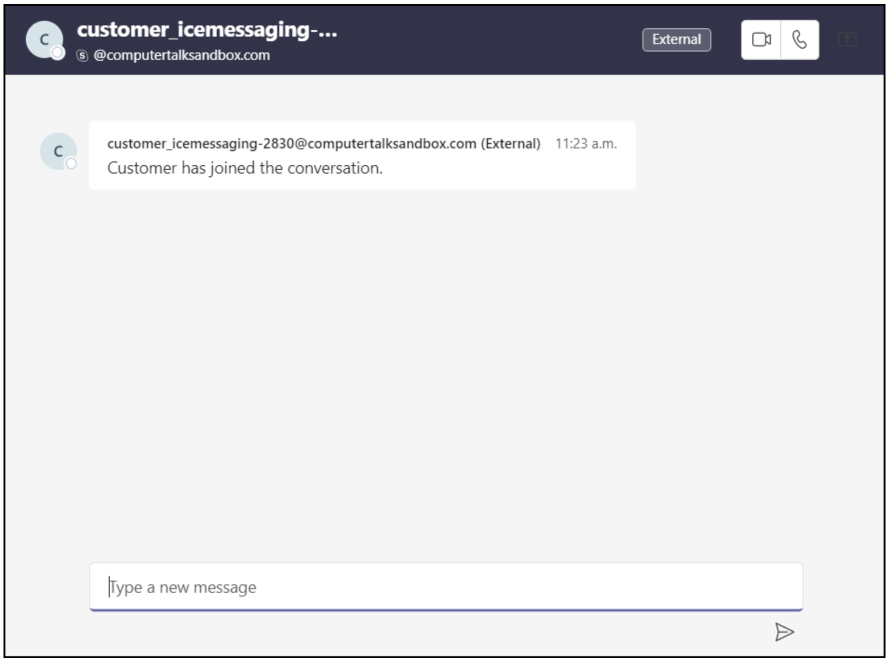
On Hook Users

If you are set as an on-hook user, you will have to click *Answer* in the Incoming IM toast window and *Accept* in the Microsoft Teams toast notification to bring up the IM conversation window.

Off Hook Users

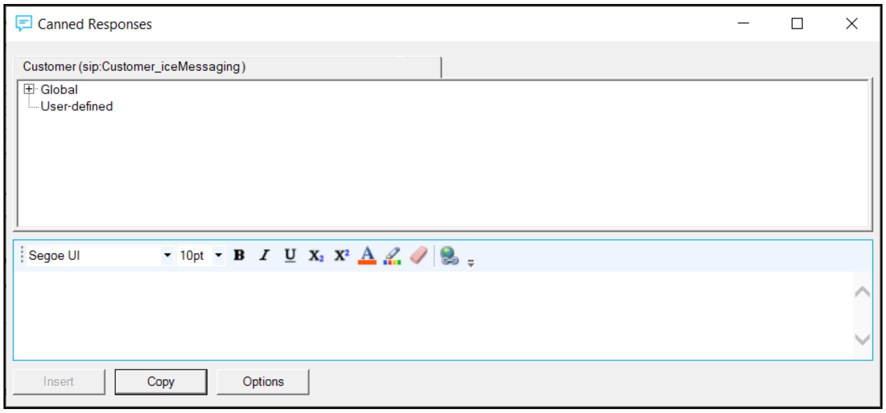
a) If you have off-hook enabled, you will only need to click the Answer button in the Incoming IM toast window.

b) The IM conversation window will appear after you click the Answer button.

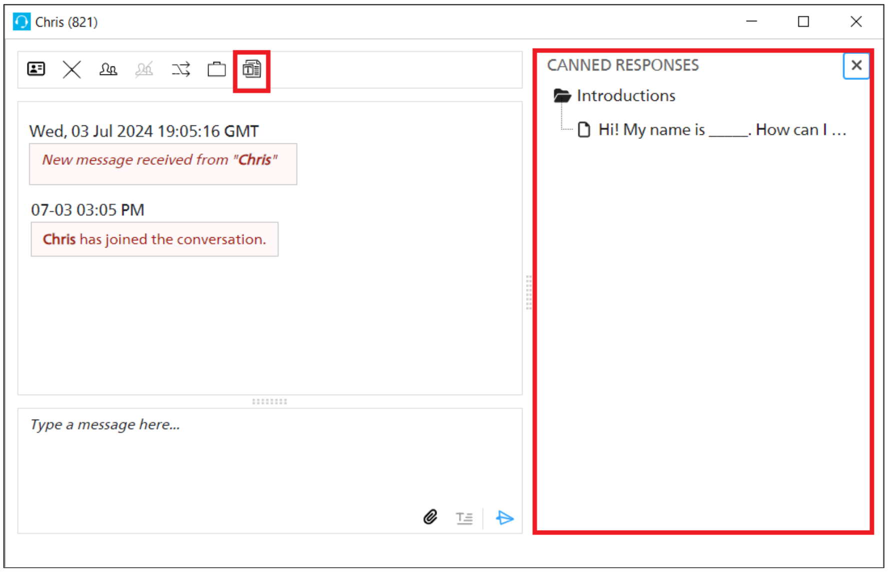


If you have icePhone configured, the icePhone client will open with the IM conversation after you click the Answer button.

c) If Canned Responses are enabled, they will open in a separate window.

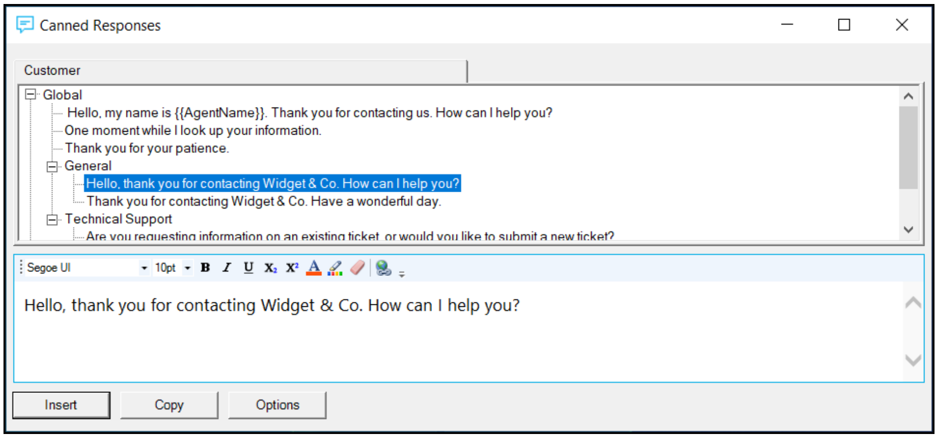


If you have icePhone configured and if Canned Responses are enabled, the Canned Responses button will be available in the icePhone client window.

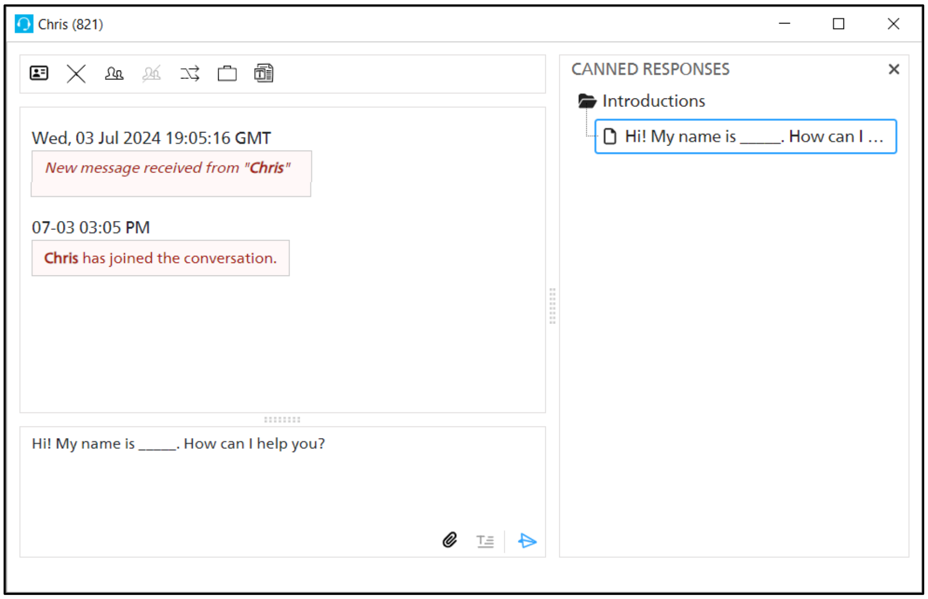


d) The IM content is located in the upper text box. Type your response in the lower text box or select a canned response and hit the 'Enter' key on your keyboard to send the message. If you wish, you can resize the chat window as well as the Canned Response list using your mouse.

e) To use canned responses, simply select the response that you would like to use from the list and click Insert. Alternatively, you may double-click the entry and it will automatically appear in the conversation box.



Notice that spell check is enabled for the text box. This leverages the same spell check engine that is provided in Microsoft Teams.



Once the entry has been inserted, you can edit it for additional personalization, before sending the message.

f) To edit, add, or delete canned responses, click the *Options* button.

To configure the canned responses on your system for icePhone, please refer to Configuring IM Canned Responses on page 93.

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.

g) Once you have finished the conversation, you can end the contact by clicking the *Release* button on your iceBar.

You will automatically be put into the Ready state unless you have wrap-up time enabled.

Note:

- If you have the Allow Multiple IM Handling class of service feature, you will need to click *Ready* to remove yourself from the On IM state.
- If you close your window while on an active chat while using icePhone, the window will pop up once the other participant replies.
- If you minimize the window while on an active chat while using icePhone, the icon on your taskbar will flash to indicate that you have a new message.

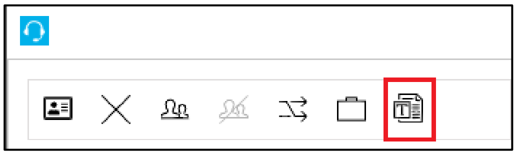
h) Click the *Ready* button to remove yourself from the Wrap up state.

   You may also click the *Sidebar* to move to the Not Ready state.

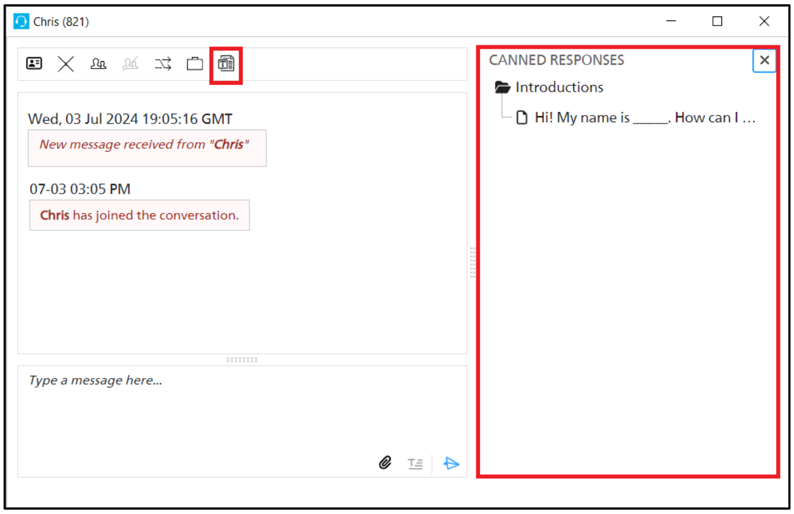
Using Canned Responses with icePhone

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

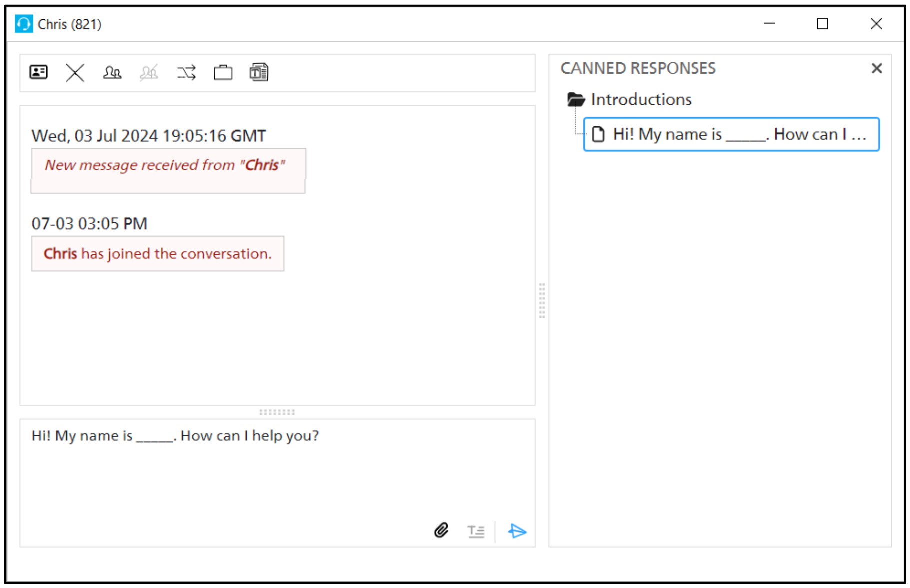
Canned responses are predetermined responses to common questions. Users can select a canned response from a pre-defined list while handling an IM contact. To do this, you can use the Canned Responses button.



Single-click the Canned Responses Button. The canned responses window will open on the right.

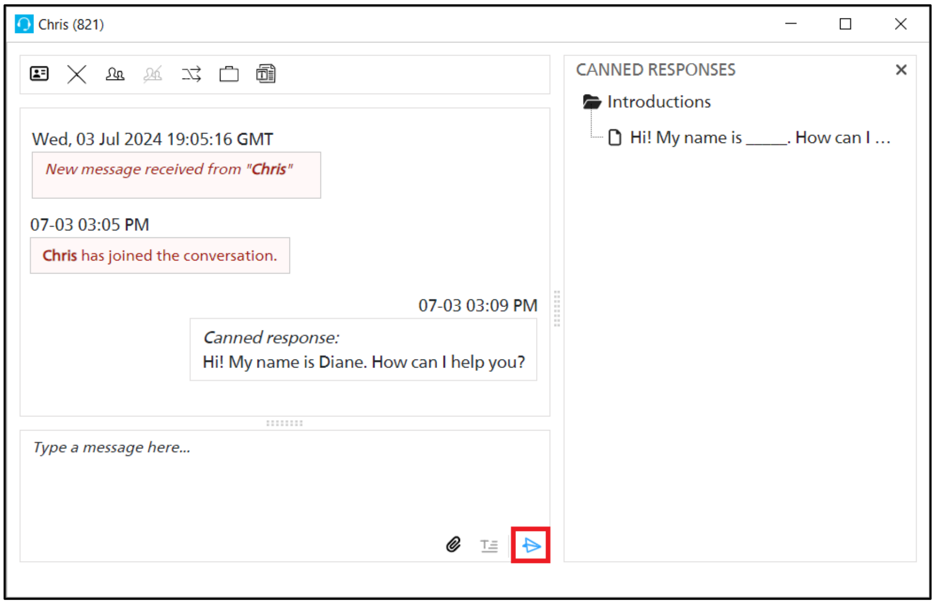


Click on the canned response you would like to enter. The text will populate in your message box.



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

Click the Send icon. The canned response will be sent in your chat conversation.



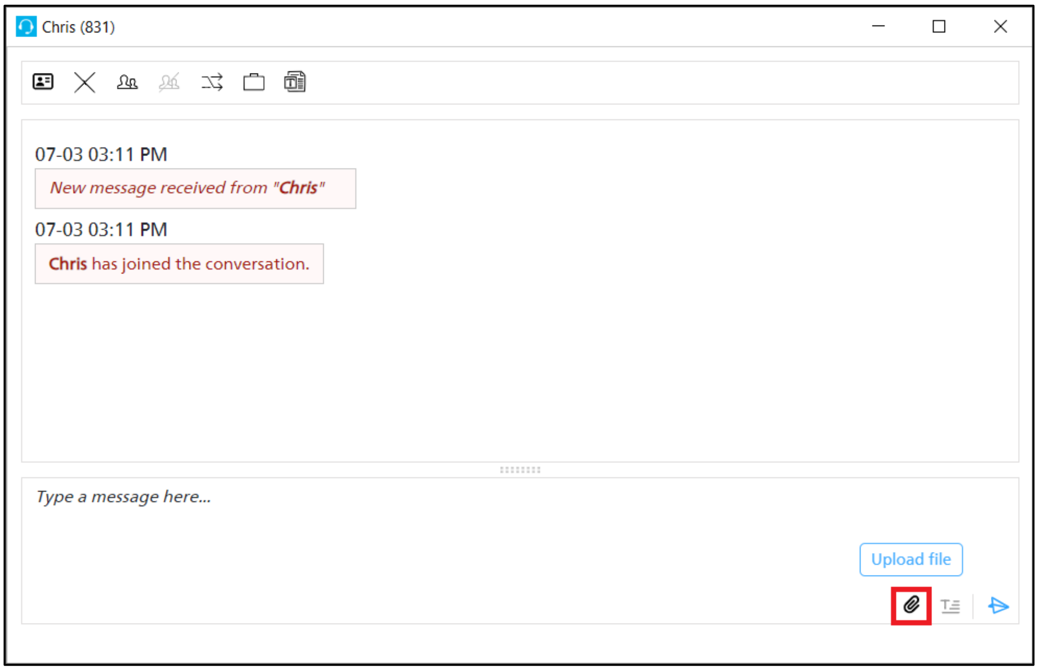
Note: If you close your window while on an active chat, the window will pop up once the other participant replies.

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.

To configure the canned responses on your system, please refer to Configuring IM Canned Responses on page 93.

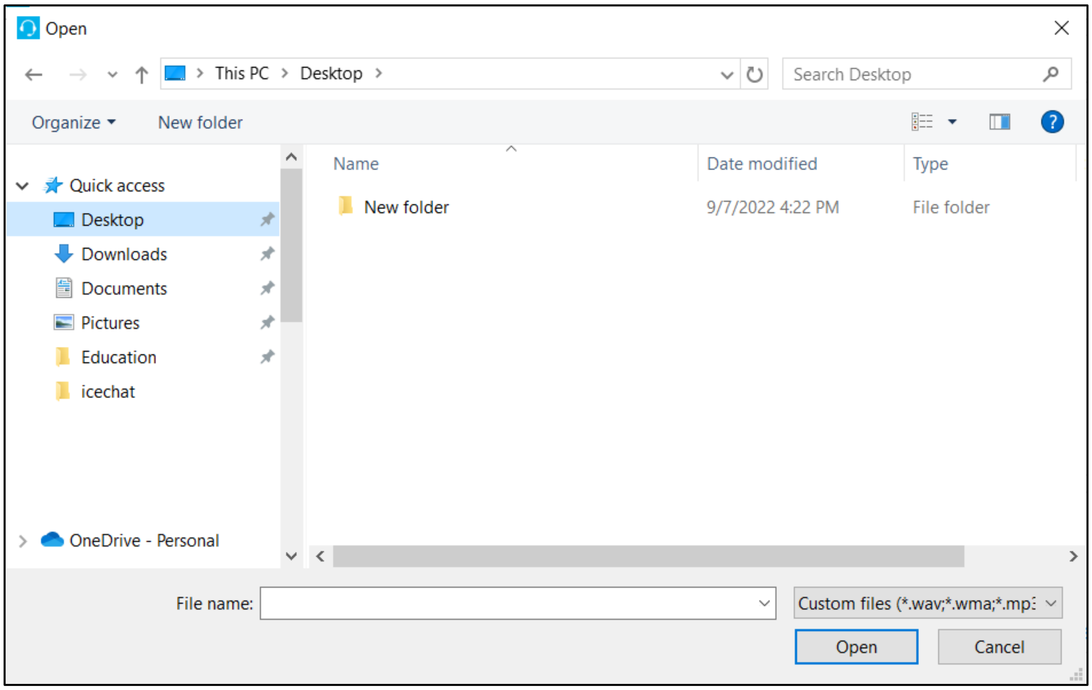
Using Contact Attachments

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 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 configuration settings in iceManager. For more information, please refer to the *iceManager User Manual*.

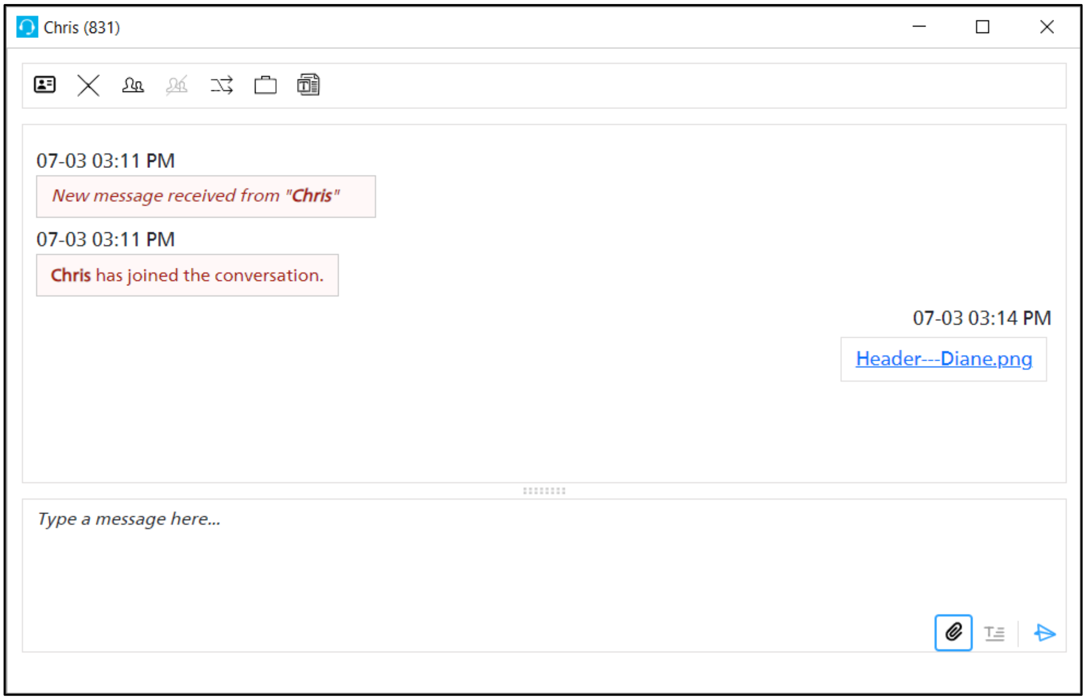


To upload a file in the chat:

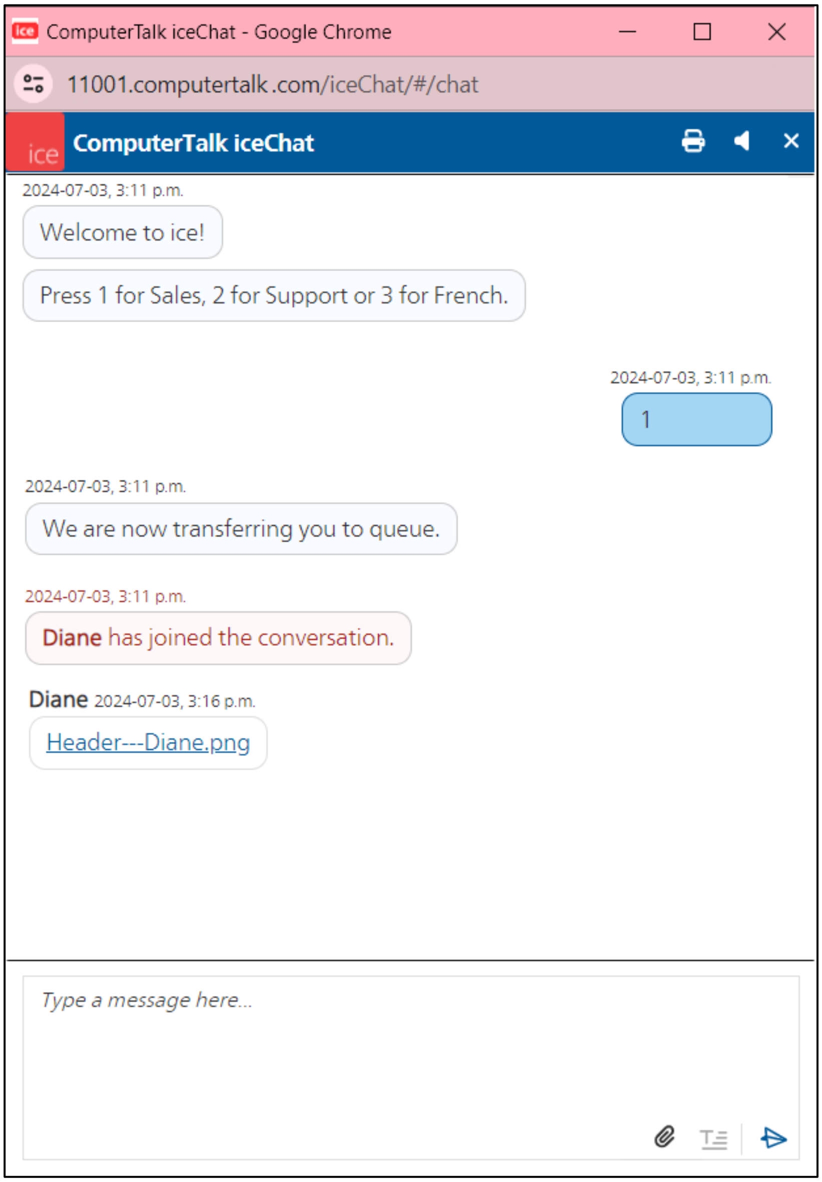
2. Click the “Upload File” button. Icebar will open the file explorer window on your local machine.



3. Select a file to upload in the chat.



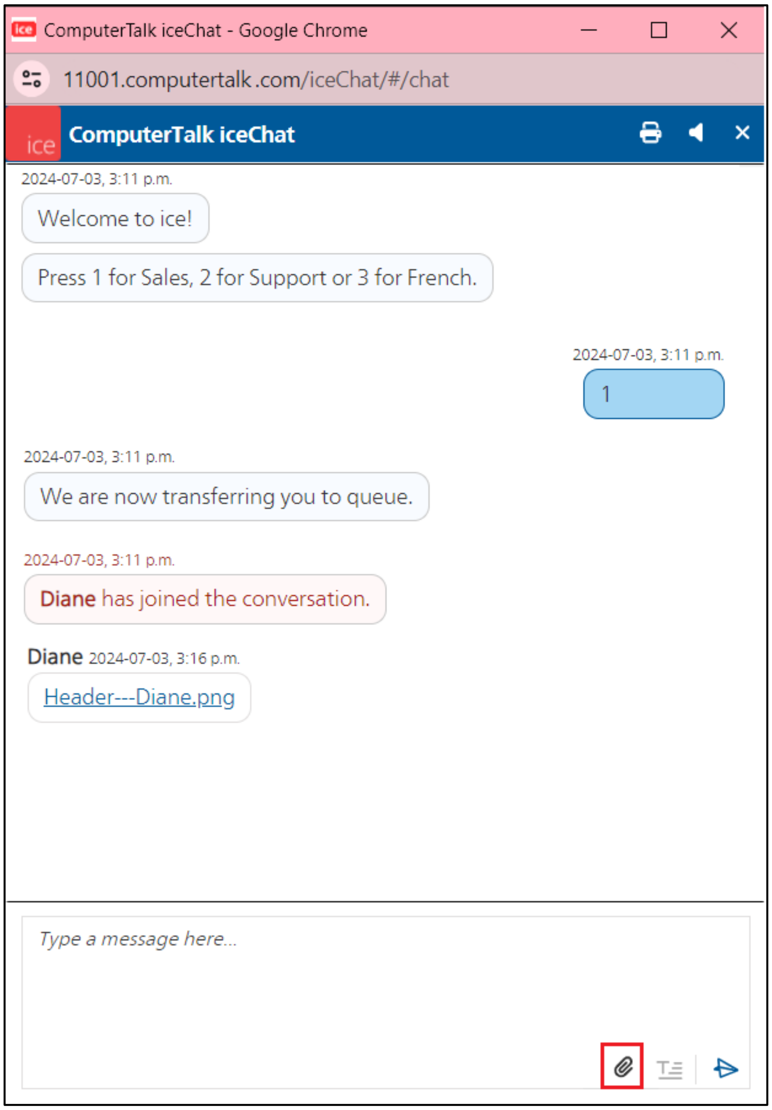
Once a file has been uploaded, the website visitor will be able to open the file in their local machine.



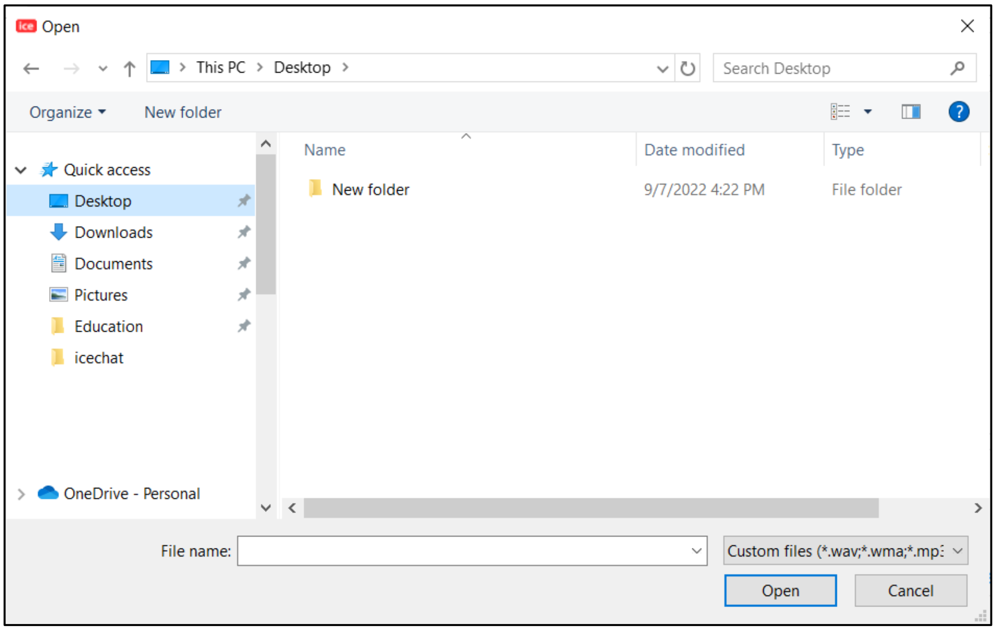
Note: Once you have selected an attachment to upload in the chat, it cannot be recalled or cancelled. The attachment link will only be valid for the amount of time specified in the Contact Attachment settings.

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

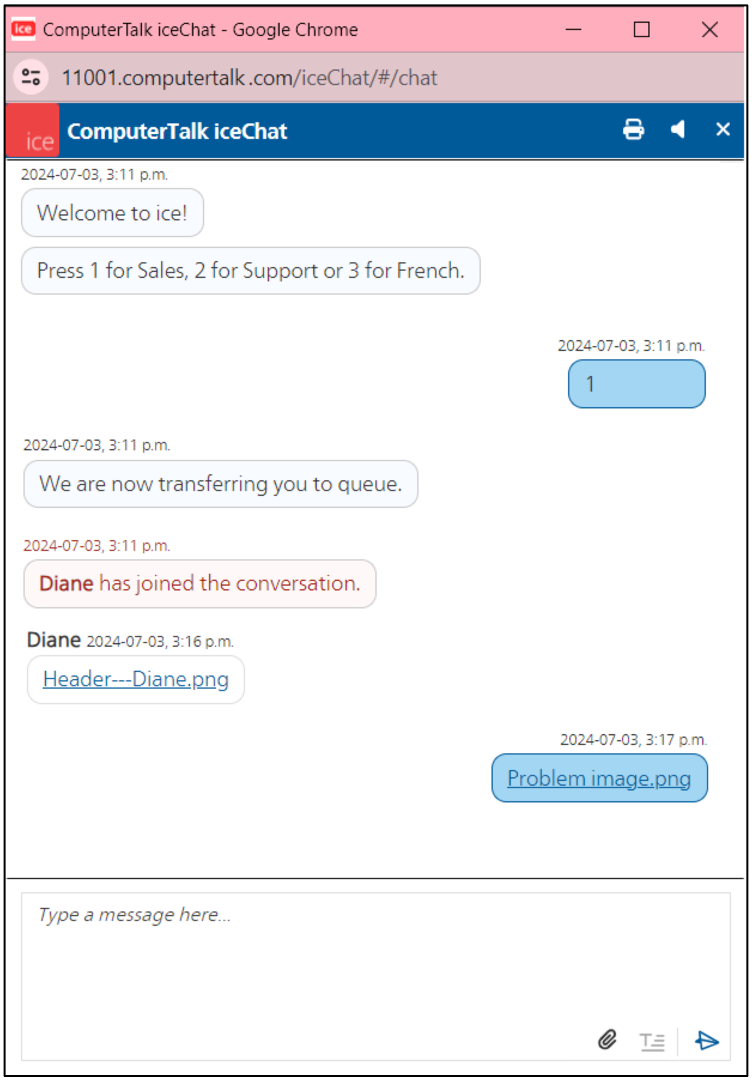
Website visitors can also upload files in the chat by clicking the Contact Attachment button located on the bottom left of the chat window.



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*.

Placing an Outbound IM

To place an outbound IM:

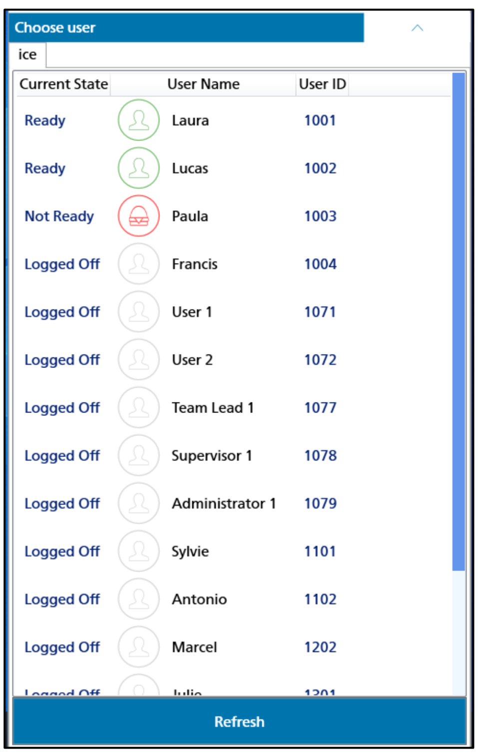
1. Click the *Start IM* button on iceBar.

   The 'Enter IM address' dialog box appears.

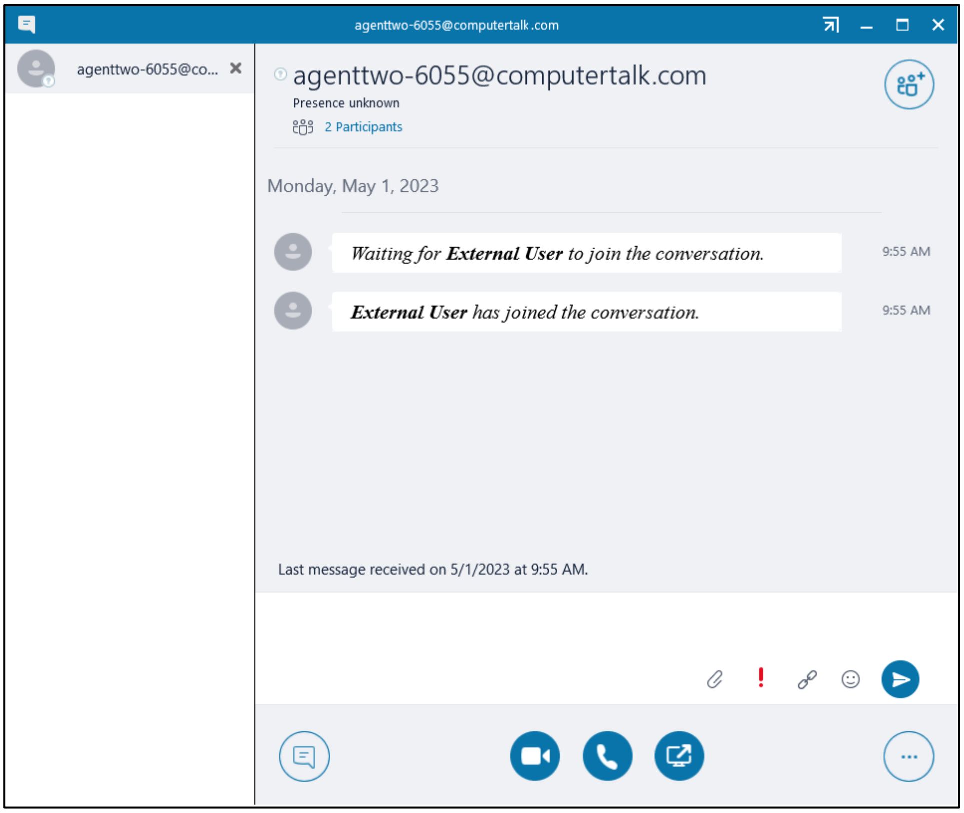
2. Enter the SIP address or User ID that you wish to contact. You must include *sip:* before the start of a SIP address. Ex: sip:asmith@company.com. Click *START IM*.

   Alternatively, you may select an address from a list of available users. To view a list of available users, click on the drop-down menu.

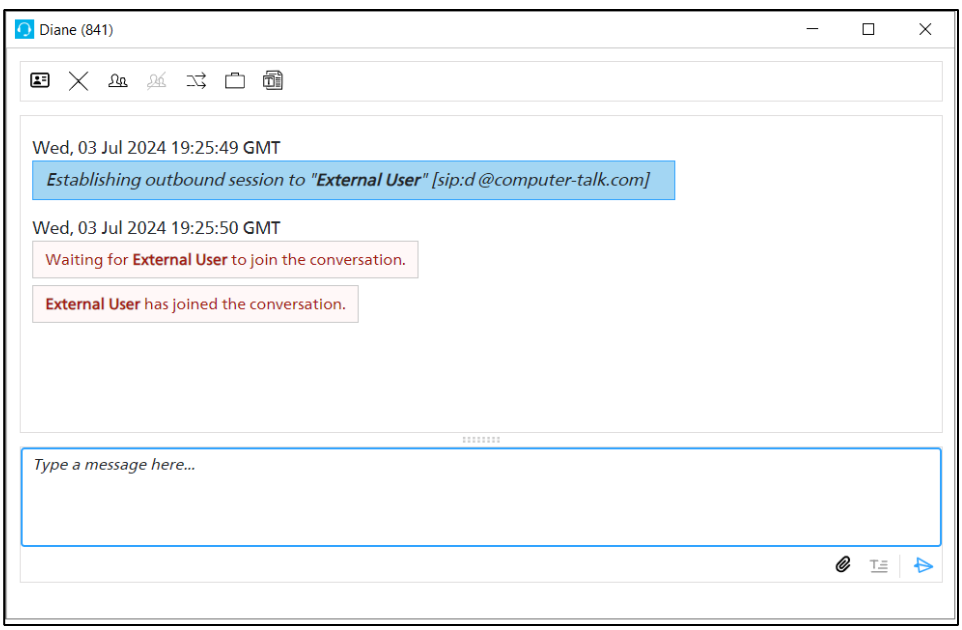
   A dialog box appears:



3. A new chat window will open after clicking the *Start IM* button.



If icePhone is configured for the user, a new chat window will open with the icePhone client.

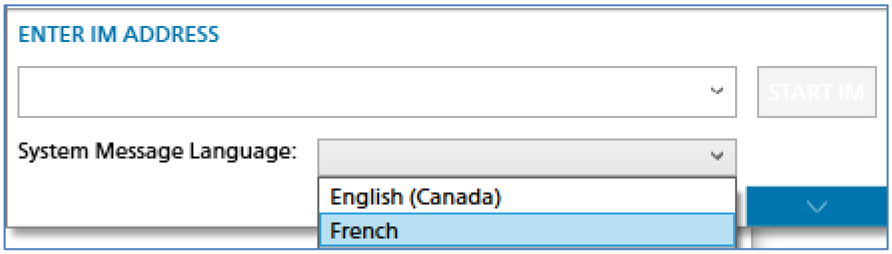


Language Selection

Users will have the option to select a system language when initiating an outbound IM. This option is only available to users whose iceBar has been configured for this feature.

To select a language on an outbound IM:

1. Click the *Start IM* button.
2. Use the System Message Language drop-down to select the system language for your outbound IM.



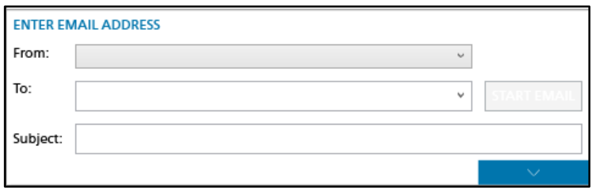
3. When you initiate your IM, the customer will receive the system messages in the language selected.

Placing an Outbound Email

To place an outbound Email:

1. Click the *Start Email* button on iceBar.

   The 'Enter email address' dialog box appears.

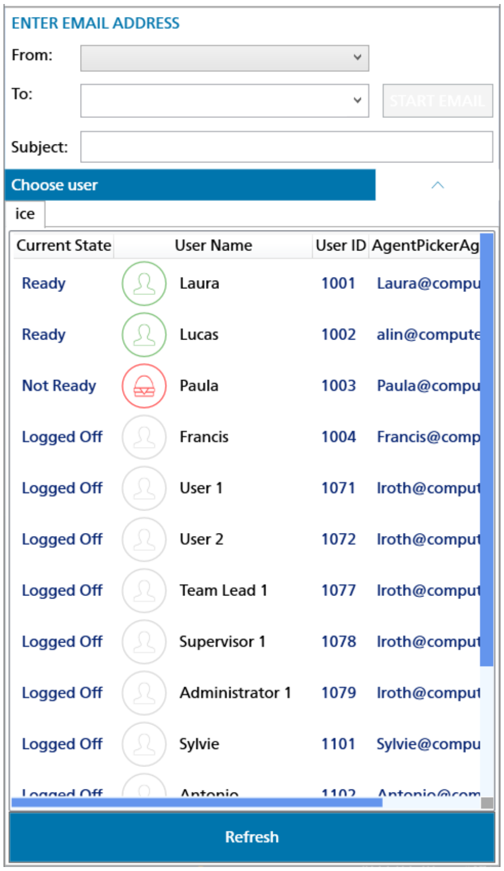
   

2. Enter the outbound email address from which you wish the email to be sent. These email addresses are configured by your ice Administrator.

   Next, enter the email address to which you wish to send the email. You must include sip: before the start of a SIP address. Ex: sip:asmith@company.com. Click Start Email.

   Alternatively, you may select an address from a list of available users. To view a list of available users, click on the drop-down menu.

   A dialog box appears:



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 IM queueing functionality.

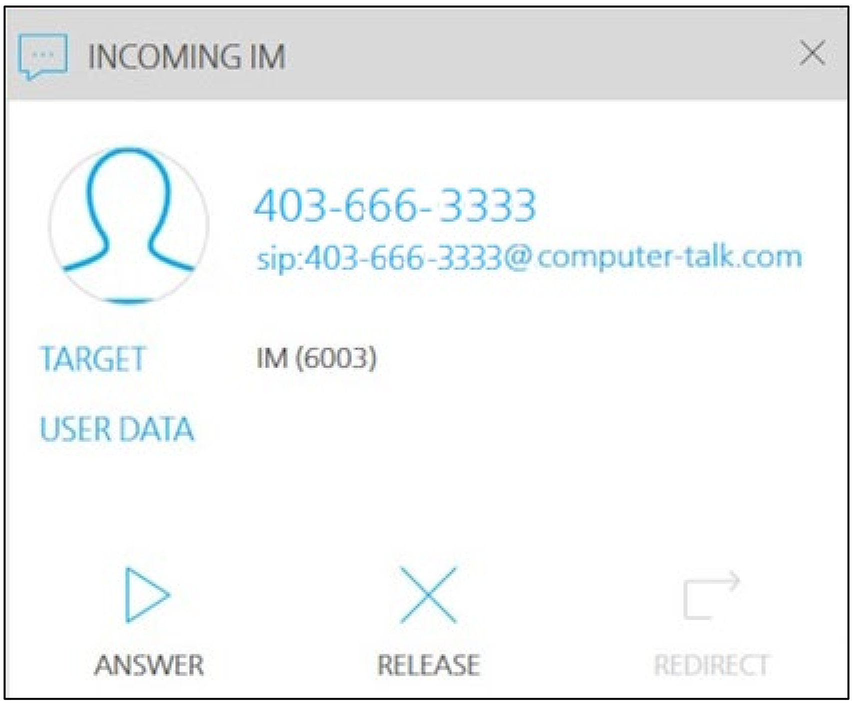
These users can either be regular users set up to handle multiple modalities or they can be dedicated SMS users set up to only handle SMS contacts.

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

Note:

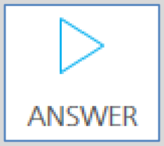
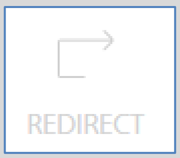
- If you have Auto Answer Email or IM class of service, you will be presented with this window however, the *Answer* button will be disabled. Instead, you will hear a beep in your headset and you will be immediately presented with the SMS message.
- Quick Text can be used to communicate internally with other users. For more information on Quick Text, refer to Quick Text Messaging on page 283.

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



The table below describes the fields displayed in the 'Incoming IM' window.

Incoming IM	
Field	**Description**
Target	The SMS queue to which the message has been sent.
User Data	Any data the SMS sender may have entered.

Incoming IM	
Field	**Description**
	'Answer' button. Once you click this button, ice routes the SMS to your Microsoft Teams client. Clicking 'Answer' is only required if the Auto Answer Email/IM class of service is disabled.
	'Release Call' button. ice sends the message back to the queue.
	This option is grayed out. You cannot redirect incoming SMS messages.

To handle the SMS:

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

3. Click *Answer* on the 'Incoming IM' dialog box.

   Notice the *Ready* button changes to indicate that you are in the IM state.
4. The Microsoft Teams client opens.

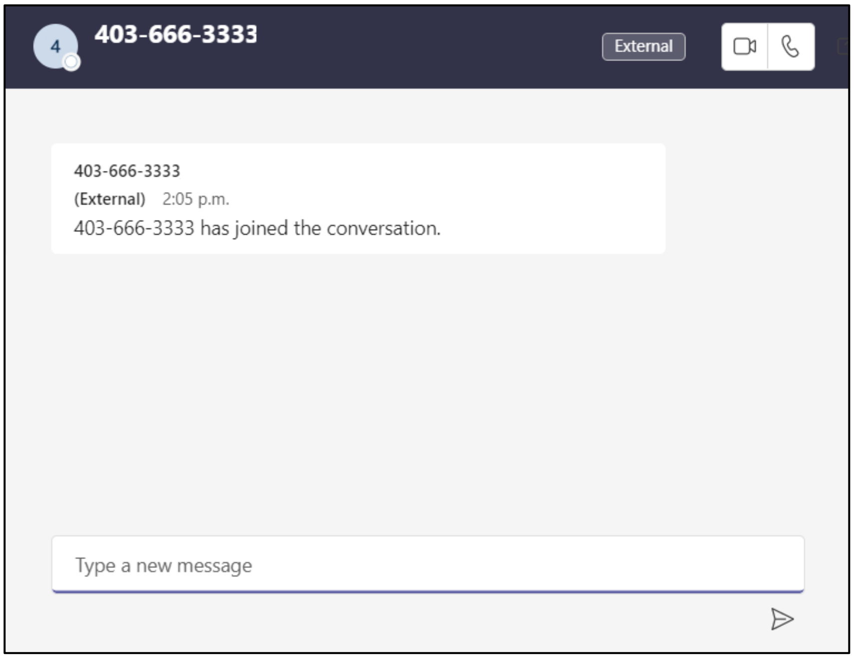
On Hook Users

If you are set as an on-hook user, you will have to click *Answer* in the Incoming IM toast window and *Accept* in the Microsoft Teams toast notification to bring up the IM conversation window.

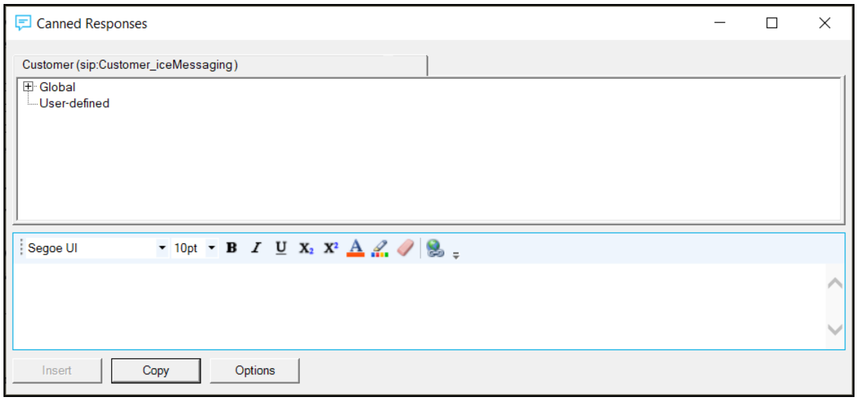
Off Hook Users

i) If you have off-hook enabled, you will only need to click the Answer button in the Incoming IM toast window.

j) The SMS conversation window will appear after you click the Answer button.

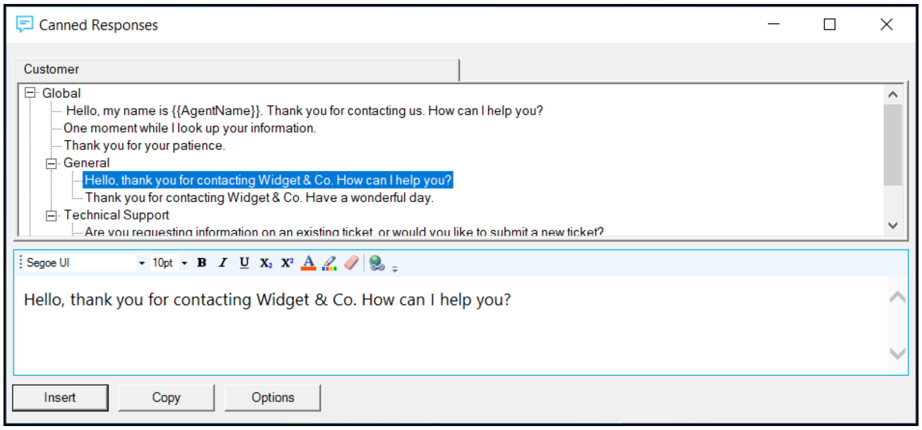


k) If Canned Responses are enabled, they will appear as a part of the SMS window.



l) The SMS content is located in the upper text box. Type your response in the lower text box or select a canned response and hit the 'Enter' key on your keyboard to send the message. If you wish, you can resize the SMS window as well as the Canned Response list using your mouse.

m) To use canned responses, simply select the response that you would like to use from the list and click Insert. Alternatively, you may double-click the entry and it will automatically appear in the conversation box.



Notice that spell check is enabled for the text box. This leverages the same spell check engine that is provided in Microsoft Teams.

Once the entry has been inserted, you can edit it for additional personalization, before sending the message.

n) To edit, add, or delete canned responses, click the *Options* button.

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.

o) Once you have finished the conversation, end the contact by clicking the *Release* button on your iceBar.

You will automatically be put into the Ready state unless you have wrap-up time enabled.

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

p) Click the *Ready* button to remove yourself from the On IM state.

You may also click the *Sidebar* to move to the Not Ready state.

Note:

ice looks out for keywords from the SMS user such as STOP or INFO, which would end the conversation or send a specific SMS to the caller respectively.

Consulting

The *Consult* button becomes available when you are on a call, when you are in On IM state, or if you have a caller on hold. 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 ice music on hold. In the case of instant messages, the third party is only chatting with user, and will not see the original chat history.

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

1. Click the *Consult* button on iceBar.

The 'Enter number to Consult' dialog box appears.

2. Enter the number of the user with whom you wish to consult.

3. Click *Consult* to dial the number entered.

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

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

1. Click the *Consult* button on iceBar.

The 'Enter number to Consult' dialog box appears.

2. Enter the SIP address of the user with whom you wish to consult.

3. Click *Consult* to connect to the user.

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 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.

After speaking to or messaging the third party, you decide to speak to or 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.

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 (i.e., 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. Please note, the *End Consult* button will end the active call that you are on (i.e., if you are actively speaking to the caller, and the consulted third party is on hold, the *End Consult* button will end the call with the caller and you are connected with the person on hold (i.e., the consulted party)

You can also use the PAQ window to end a consultation call. Right-click the active contact and select ‘End Consult’ from the menu that appears. For more information on the PAQ Window, refer to Chapter 4: Personal Access Queue

Note: When initiating a consultation call, the Release button will be enabled while the Consult, End Consult, and Conference buttons will be disabled.

Consult and Conference

1. 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.

   After speaking to or 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 interaction, the other two parties remain connected, while you are free to handle another contact.

   You can also use the PAQ window to conference. Right-click the active contact. In the menu that appears, select ‘Conference’. For more information, refer to Chapter 4: Personal Access Queue

2. 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. You use the *Conference* button to conference the original party with the consulted party.

   You may wish to discuss a topic further with only the original party. To do this, you would click the *Conference* button again to end the conference. This would put the person you consult with on hold, and your active call would be with the original party.

   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.

   Note:

   - The transfer button will be disabled when an agent is in a consulting state

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, you may speak freely while your original caller listens to music. 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. The original contact and the third party are connected and you are free to handle another contact. You can also hang up the receiver on your traditional telephone or close the IM box to complete the transfer.

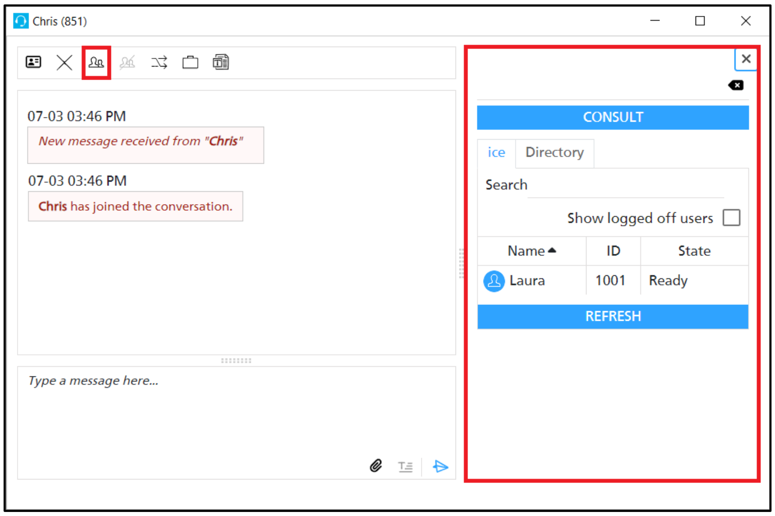
You can also use the PAQ window to release a call. Right-click the active contact. In the menu that appears, select ‘Release’. For more information on the PAQ window, refer to Chapter 4: Personal Access Queue

Similar to calls, you can use the Conference button to create an IM conference or you can use the Release button to transfer an IM to a consulted party.

Consult with icePhone

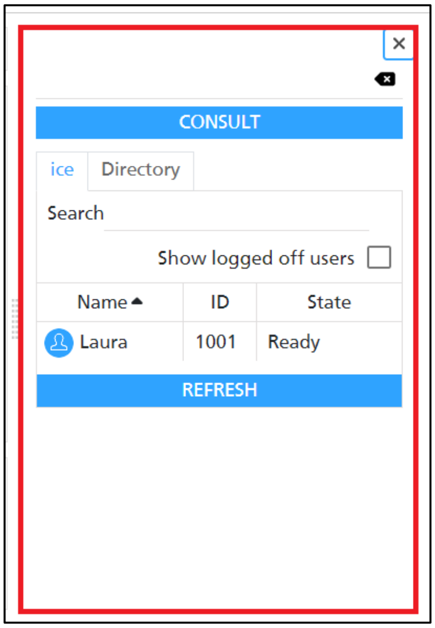
You can also use the Consult button with icePhone. To do this, click the Consult button on the icePhone client window.

The Consult button will open the Consult tab on the right.



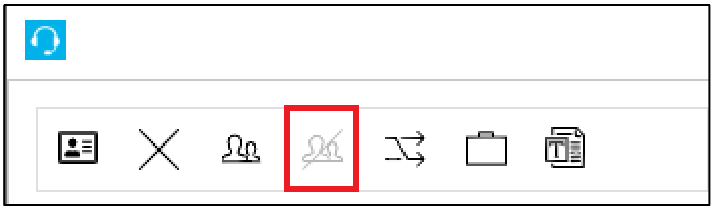
Enter the Queue ID, user ID, or SIP address you would like to consult with.

Use the ice directory below the Consult button to see the list of users and their availability.



Enabling the Show Logged off Users checkbox will show you a list of users configured for your contact centre.

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



Multi-party Conferencing

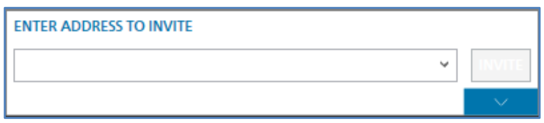
The *Add Participant* button allows you to add multiple participants to a call. This button becomes available once you are on a call with at least one other participant.

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

To start a multi-party call:

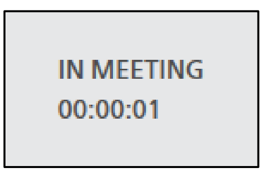
1. First, you must be in a call with a least one other participants.
2. Click the *Add Participant* button on iceBar.

The ‘Enter address to invite’ dialog box appears.



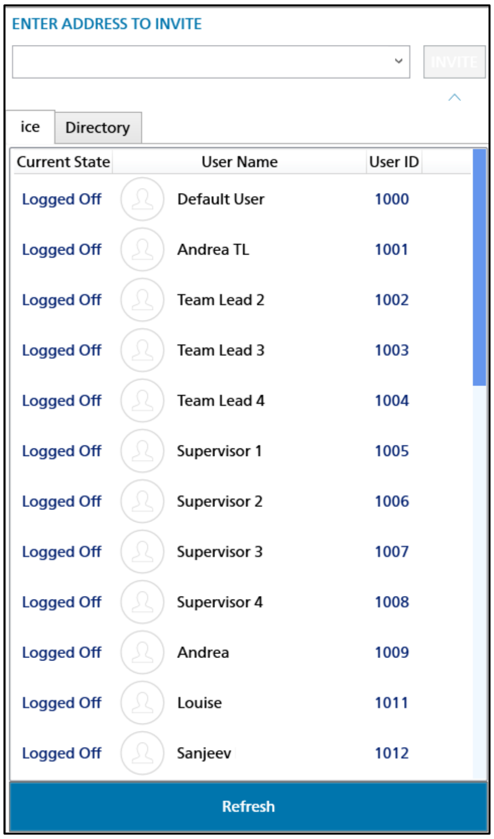
3. Enter the phone number or the SIP address of the user with whom you wish to invite.
4. Click *Invite* to dial the number entered.

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.



Alternatively, you may select a number from a list of available users. To view a list of available users, click on the drop-down menu.

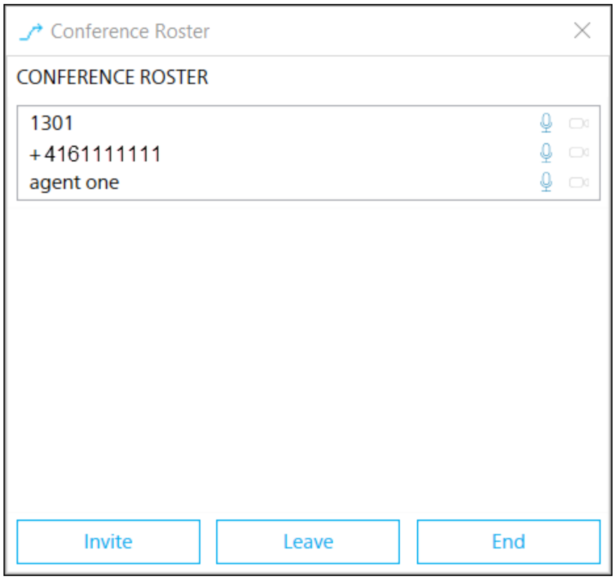
A dialog box appears:



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.

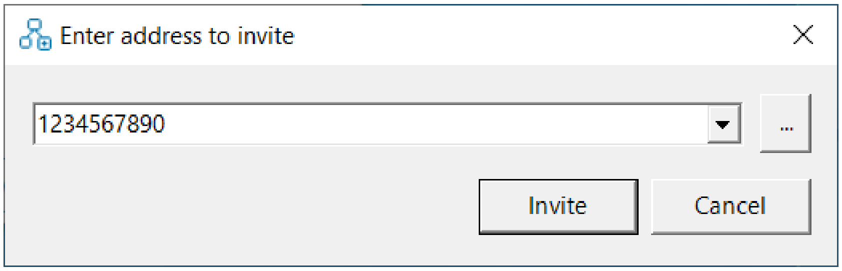
When you start a multi-party conference, the *Conference Roster* automatically opens. If you close the *Conference Roster*, you can open it at anytime by clicking on the *Conference Roster* button.



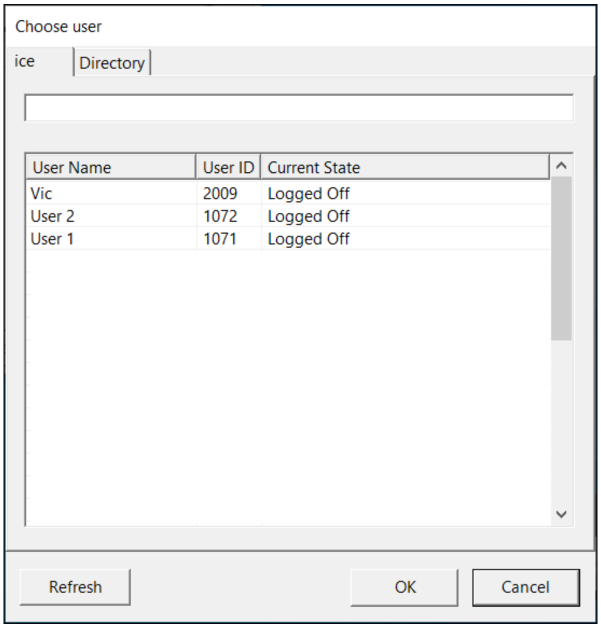
The buttons along the bottom of the Conference Roster window allow you to invite additional participants to the meeting, leave the meeting or end the meeting.

To add an additional user to the meeting:

1. Click the *Invite* button.
2. In the text box, enter the address of the participant you would like to invite.



To place a call to another ice user, click on the three dots to the right, to select the user.



Select the user from the list and click OK.

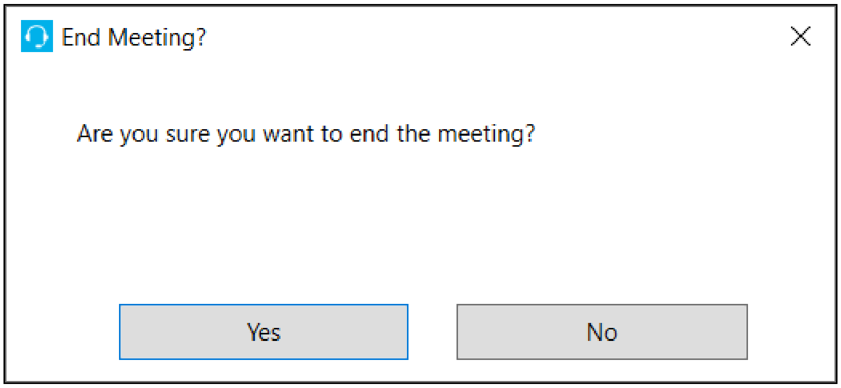
3. Click *Invite* to invite the user to the meeting.

To leave the meeting:

1. Click the *Leave* button. This will remove only yourself, and the other participants will remain in the meeting.

To end the meeting for all participants:

1. Click the *End* button.
2. The End Meeting? Dialogue box opens. Click *Yes* to end the meeting for all participants, or *No* to cancel, and return to the *Conference Roster* window.



Picking a Contact

The *Pick Contact* button allows you to pick up contacts:

- From a queue to which you are not assigned.
- From a ringing telephone.
- From another user's Personal Access Queue (PAQ) or your own PAQ.
- Being held at another user's workstation.

This section explains how to pick up a contact in each of these scenarios.

Note: If you use the Pick feature to pick a call when your ice telephone line is on hook, then ice must first place a call to you. When you pick up your ringing phone, you are connected with the call.

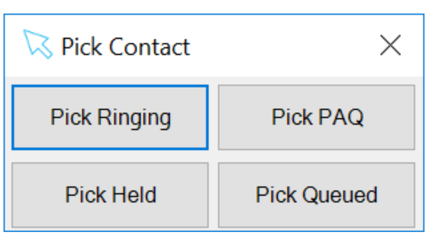
Pick Queued

The *Pick Queued* button can be used to pick a single contact out of a queue to which you are not assigned. For example, you might be a bilingual user that only takes calls from a French queue. However, if the English queue becomes very busy, you might be asked to pick a call from that queue. Because you are not assigned to the English queue, you can only be aware of its busy state if you are informed by a Supervisor or if you configure your 'Queue Statistics' window to show information about the queue. For more information about configuring the 'Queue Statistics' window, refer to Chapter 5: Queue Statistics.

To pick a contact from a queue:

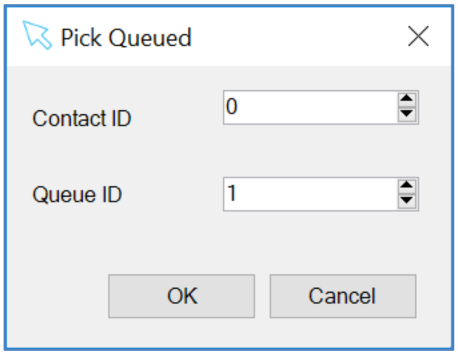
1. Click the *Pick Contact* button on iceBar.

   The 'Pick Contact' dialog box appears.



2. Click Pick Queued.

The 'Pick Queued' dialog box appears.



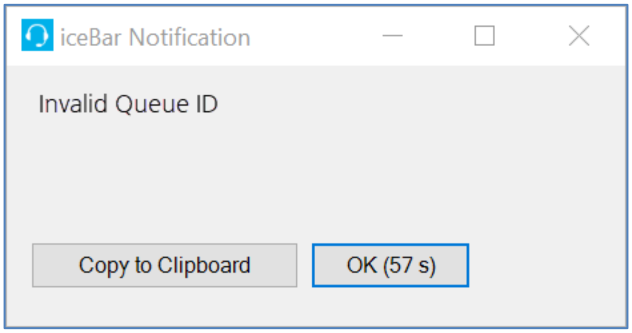
Picking a Contact ID

Note: The Contact ID field is editable, allowing the user to enter a specific contact ID. For earlier server versions, this field is greyed out and unavailable.

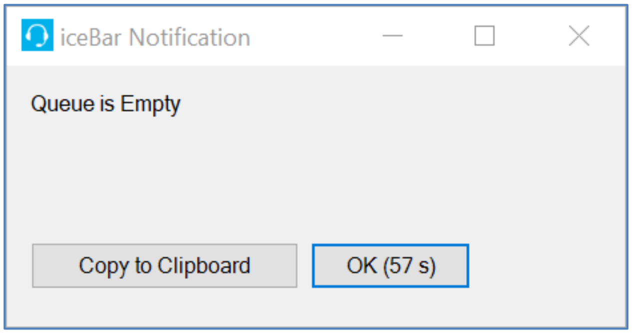
To pick a Contact ID, enter the ID in the Contact ID field and click *OK*.

Picking a Contact from Queue

To pick a contact from queue, enter the ID of the queue from which you wish to pick a contact, and click *OK*. If you enter an incorrect Queue ID, you will see the following message. Click *OK* to return to the Pick Queued dialog box to try again.



Note: If there are no contacts waiting in the selected queue, ice plays a fast-busy signal and displays the message below.



Refer to the ‘Queue Statistics’ window to determine if there are calls waiting in the queue before using the Pick Queued feature. For more information, refer to Chapter 5: Queue Statistics.

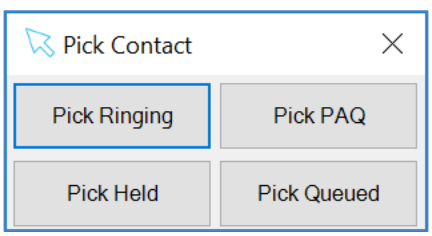
Pick Ringing

The Pick Ringing feature allows you to pick up a call that is ringing at another user’s workstation.

To pick up another user’s call:

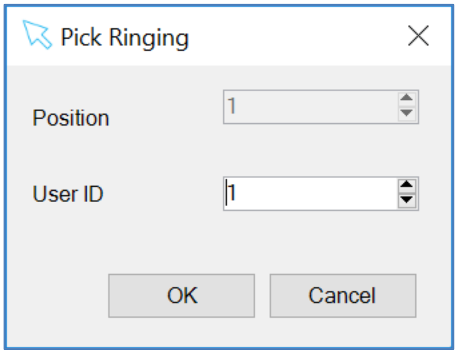
1. On iceBar, click the *Pick Contact* button.

   The ‘Pick Contact’ dialog box appears.

2. Click *Pick Ringing*.

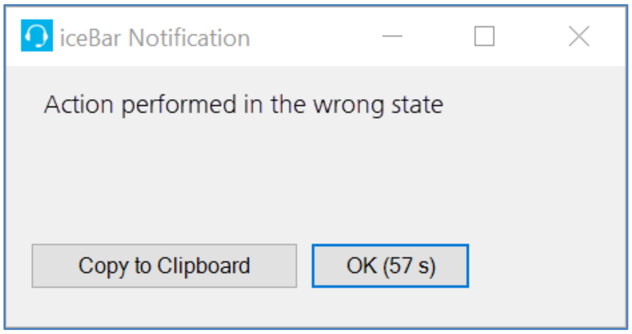
The 'Pick Ringing' dialog box appears.



3. Enter the User ID of the ringing phone, the Queue ID, or the Team ID and click *OK*.

   If you enter the Queue ID or the Team ID, you will pick up the longest ringing call from the users assigned to the queue or team that you specified. You can also enter '0' to pick up the longest ringing call from the users assigned to all the queues to which you are assigned.

   Note: If a call is not alerting at the selected user's workstation, you hear a fast-busy signal and see the message below:



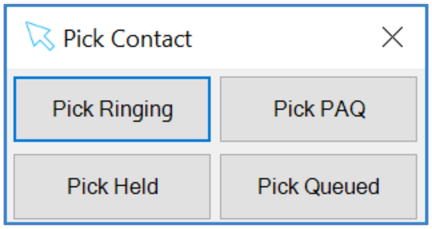
Pick PAQ

Pick PAQ allows you to pick up a contact that is waiting in another user's Personal Access Queue (PAQ). To use this feature, you must first know that a contact is queued in another user's PAQ. You cannot view another user's PAQ with iceBar, so you might only use this feature if another user asks you to pick up a contact waiting in his or her PAQ.

To pick up a contact in another user's PAQ:

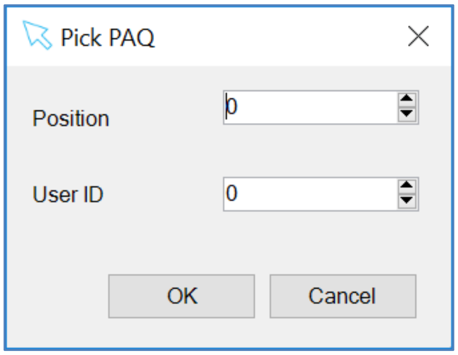
1. Click the *Pick Contact* button on iceBar.

The 'Pick Contact' dialog box appears.



2. Click *Pick PAQ*.

   The 'Pick PAQ' dialog box appears.

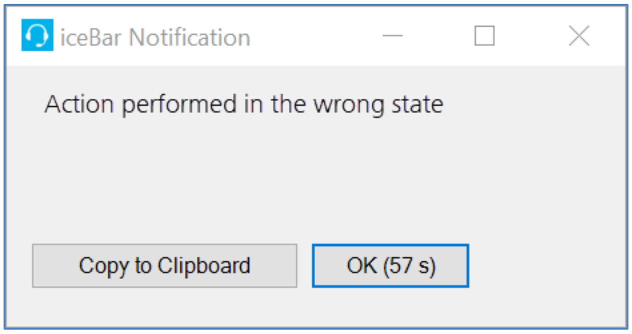


3. Enter the user ID and the position that the contact occupies in the specified user's PAQ, then click *OK*. Use position 0 to pick the oldest call queued in PAQ.

   You are connected with the contact waiting in the specified PAQ position.

Note:

- You can also use the PAQ Window to pick a contact that is waiting in your PAQ. Right-click a contact in your PAQ and click 'Pick' from the menu that appears. For more information, refer to Chapter 4: Personal Access Queue
- If a contact is not waiting in the PAQ position that you specified, you hear a fast-busy signal and see the message below:



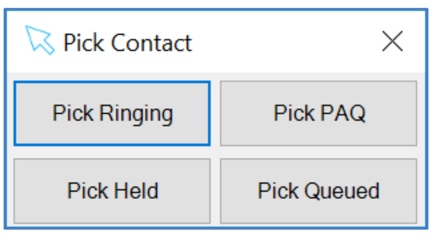
Pick Held

This feature allows you to pick up a call that has been placed on hold by another user. To use this feature, you must know the User ID of the user that has placed the caller on hold.

To pick up a call placed on hold by another user:

1. Click the *Pick Contact* button on iceBar.

   The 'Pick Contact' dialog box appears.



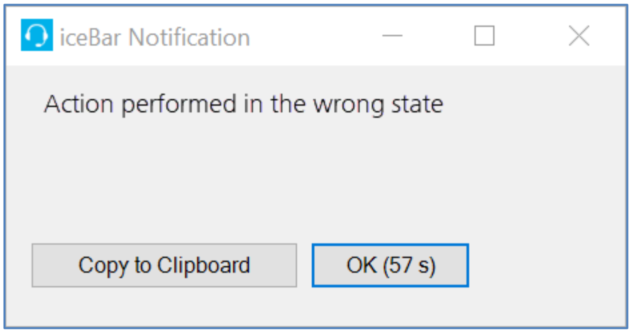
2. Click Pick Held.

   The 'Pick Held' dialog box appears.

3. Enter the user's ID and click *OK*.

   ice connects you with the caller on hold at the specified user's workstation.

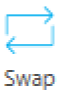
Note: If the user you specified is not holding a call, you hear a busy signal and see the message below:



Swapping a Call

The *Swap* button allows you to connect to a contact that is waiting in your Personal Access Queue (PAQ), replacing the call that you are handling.

The *Swap* button:



- places your current caller into your PAQ (parks the call)
- connects you with a contact that has been waiting in your PAQ

Click the *Swap* button to place the call that you are currently handling into your PAQ and retrieve the oldest contact from your PAQ. You may click the *Swap* button again to toggle between two calls.

Note:

- The *Swap* button will not work for email contacts.
- If you have the Multi-Contact Handling Class of Service enabled in your user profile in iceAdministrator, the *Swap* button will only be available if there is a parked voice contact in your PAQ. The *Swap* button will be disabled for IM contacts.
- If you do not have the Multi-Contact Handling Class of Service enabled in your user profile in iceAdministrator, you will be able to use the *Swap button* if there is a parked voice or IM contact in your PAQ.
- You can also use the PAQ window to swap a call that is waiting in your PAQ with your active call. Right-click a contact waiting in your PAQ and select 'Swap' from the menu that appears. For more information, refer to Chapter 4: Personal Access Queue
- The *Swap* button does not become available until you are on a call and a contact is waiting in your PAQ.

Parking a Contact

The Park feature allows you to place a call or email into your Personal Access Queue (PAQ). Parked calls are not subject to the PAQ Overflow Threshold. Therefore, while another user might call you directly, enter your PAQ and then overflow to voicemail, a call that you place into your PAQ using the *Park* button remains there until:

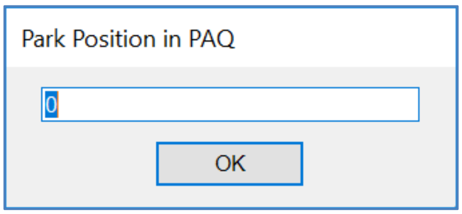
- you pick it up again, or
- the caller hangs up

To park a call in your PAQ:

1. Click the *Park* button on the iceBar toolbar, if configured there. Otherwise open your PAQ and right click on the active contact and select ‘Park’.

The ‘Park Position in PAQ’ dialog box appears.

2. Enter the appropriate row of the PAQ window in which to park the call.



3. Click *OK*.

The call is parked in the selected position of the PAQ.

Note:

- To retrieve the contact, use the *Pick Contact* button as described on page 151.

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

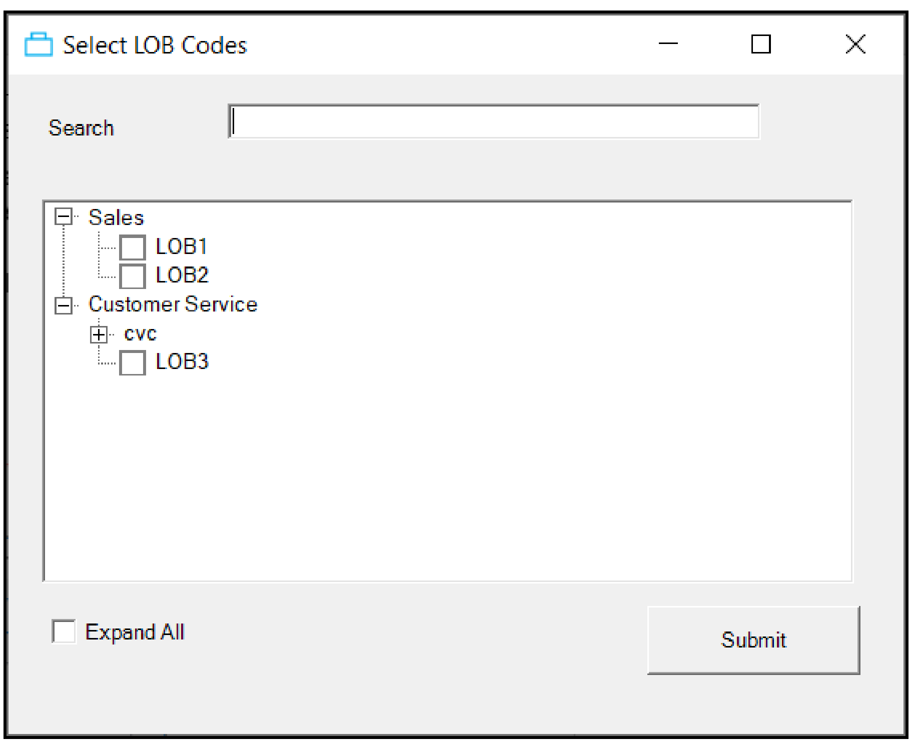
Users with Team Lead access level or higher can modify Line of Business codes in iceManager settings. For more information, refer to the iceManager User Manual.

Using Line of Business Codes


LOB

To use a Line of Business code:

1. While you are handling a contact, click the *LOB* button on the iceBar toolbar.
2. The ‘Select LOB Codes’ dialog box appears.



3. 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 an LOB code.

Note: Line of Business codes can be created and modified by the ice Administrator (e.g., ‘LOB1’ can be modified to show ‘VIP Customer’). For more information, refer to Appendix A: Global Settings.

Using Forced Line of Business Codes

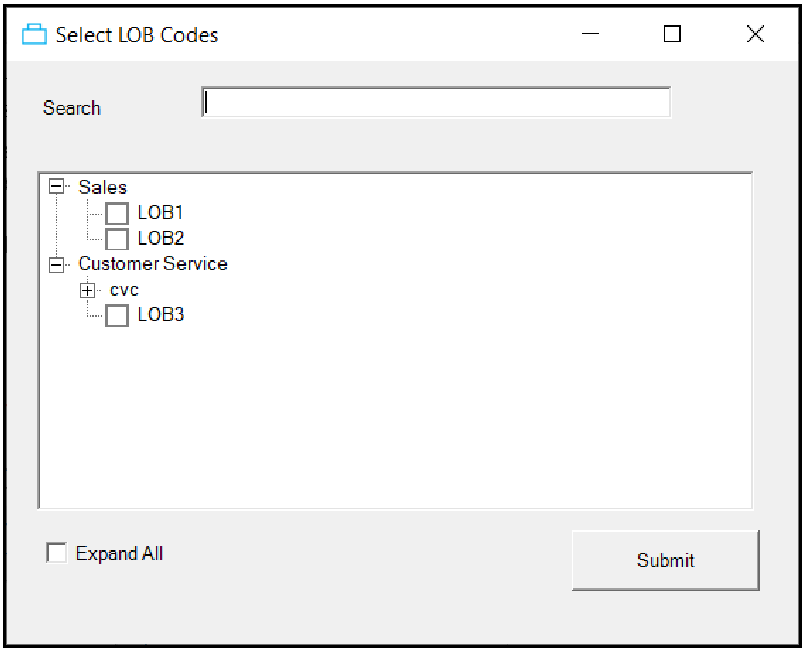
When the forced LOB codes feature is enabled, you can click the *LOB* button and select a code at any time during the call, as described in the previous section.

Note: With forced LOB codes enabled, the ‘LOB’ dialog box will pop on top of any other open windows and can only be closed after you have selected the appropriate number of LOB codes. You may be required to select more than one, depending on your configuration.

If a LOB code(s) has not been selected during the call, you will be forced to select a LOB code (or multiple LOB codes) upon completion of the call.

<u>To use forced LOB codes:</u>

1. Once you finish handling a contact, you enter the Wrapup state.
2. The ‘Select LOB Codes’ dialog box appears.



3. Click the appropriate LOB code. You may be required to select more than one LOB code, depending on your iceBar settings. The codes that you select will be greyed out.

   The 'LOB' dialog box closes, and you remain in the Wrapup state.

4. When you are available to take another call, click the sidebar to put yourself into Ready state.

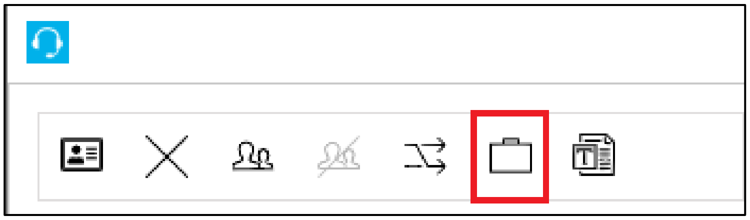
Note:

- If iceBar requires more than one LOB code per call, the LOB codes that you have selected for the call will be greyed out, ensuring that you do not select the same LOB code twice. When you enter the Ready or Not Ready state after the Wrapup state, the LOB selections will again be available for the next call.
- The user must be configured with the Wrapup After Queued Call class of service feature (to force LOB codes after handling queued contacts), and/or the Wrapup After Placed Call class of service feature (to force LOB codes after making an outbound call, for example in outbound campaigns). For more information, refer to the iceAdministrator User Manual.

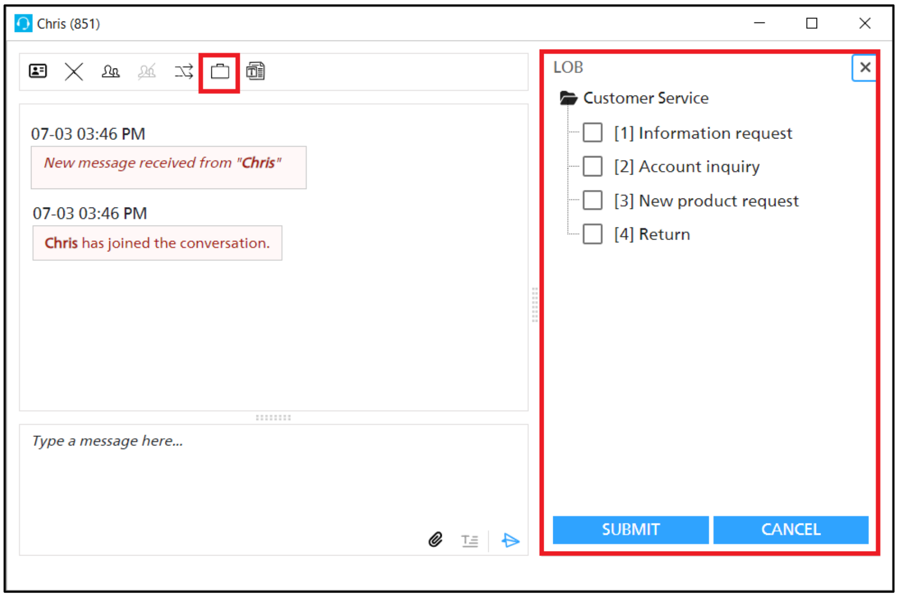
- The queue must be configured to allow infinite wrap up time. This setting is enabled in the properties for the queue. This applies to forced LOB codes for queued calls. For more information, refer to the iceAdministrator User Manual.
- The Auto Wrap time for placed calls must be set to infinite. This setting is enabled in a user's profile. This applies to forced LOB codes for outbound calls. For more information, refer to the iceAdministrator User Manual.
- The Global Settings for iceBar must be modified to allow forced LOB codes. These settings can be modified by a trained technician. For more information on Global Settings, refer to Appendix A: Global Settings.
- When handling multiple email or IM contacts with forced LOB codes, you must enter the required LOB codes for a contact before transitioning to the next contact.

Using LOBs with icePhone

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



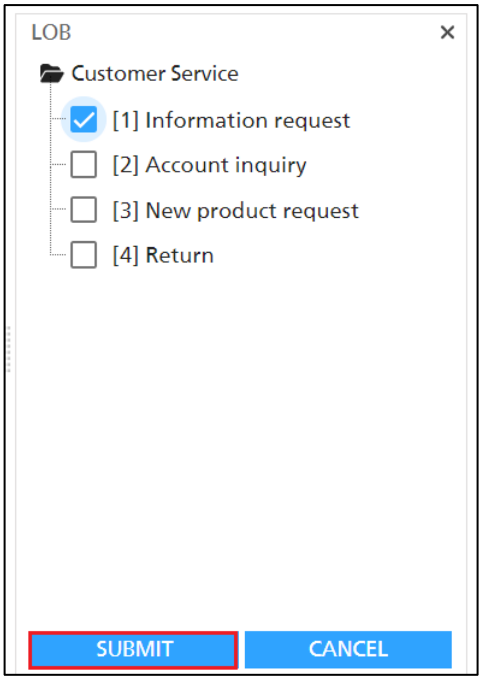
Single-click the LOB button. The LOB tab will open on the right.



Select the code(s) that apply.

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

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.

Quick Text Messaging

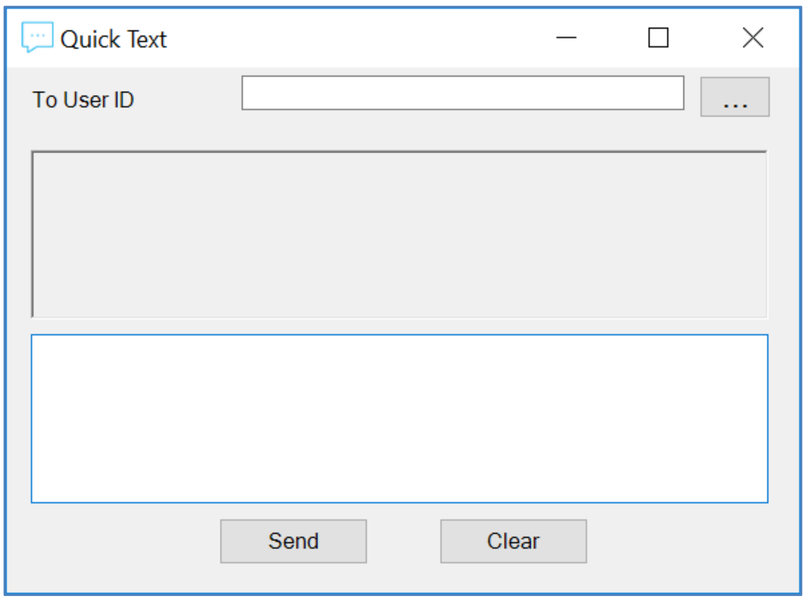
Quick Text Messaging on iceBar allows you to send a message to any other user running iceBar, iceAdministrator, or iceMonitor. In order for you to receive a message that someone sends to you, you must have the iceBar application open, but you do not have to be logged on.

To send a message to another user:

1. Click the *Quick Text* button on the iceBar toolbar.

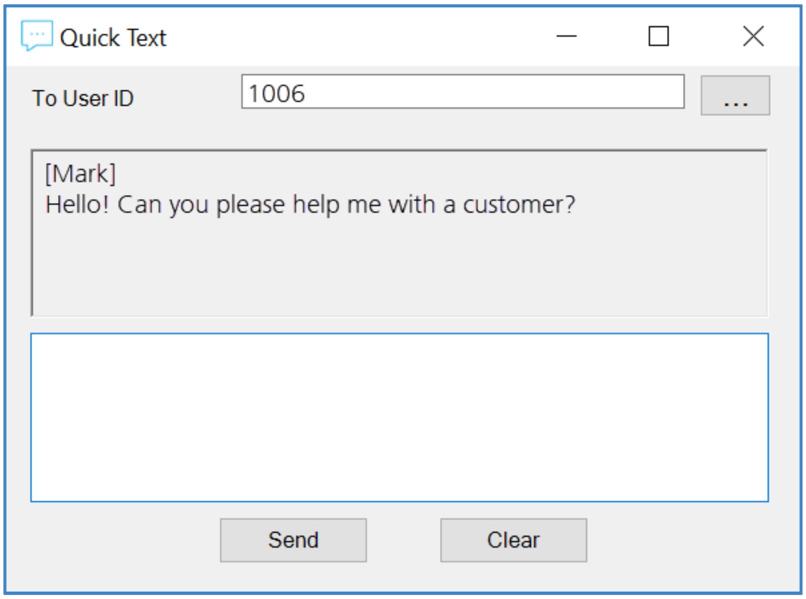
The 'Quick Text' dialog box appears.

2. In the 'To User ID' field, enter the four-digit ID of the user to whom you wish to send a message. Alternatively, you may click the ellipsis button for a list of users and their user state.
3. Type the text of the message in the lower text box.



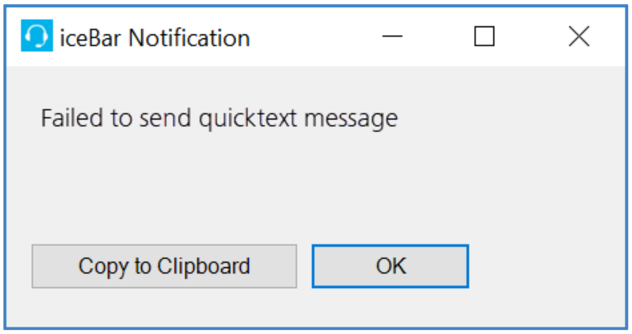
4. Click *Send* to send the message to the specified user or click *Clear* if you wish to delete your unsent message.

Once sent, the user receives the message, as shown below.



Note:

- To respond directly to a text message, enter your message in the lower text box and click *Send*.
- Users will receive messages even if they are logged off of ice, as long as they are running iceBar.
- If the user to which you sent the message does not have iceBar, iceAdministrator, or iceMonitor open on their computer, you will see the following error message:

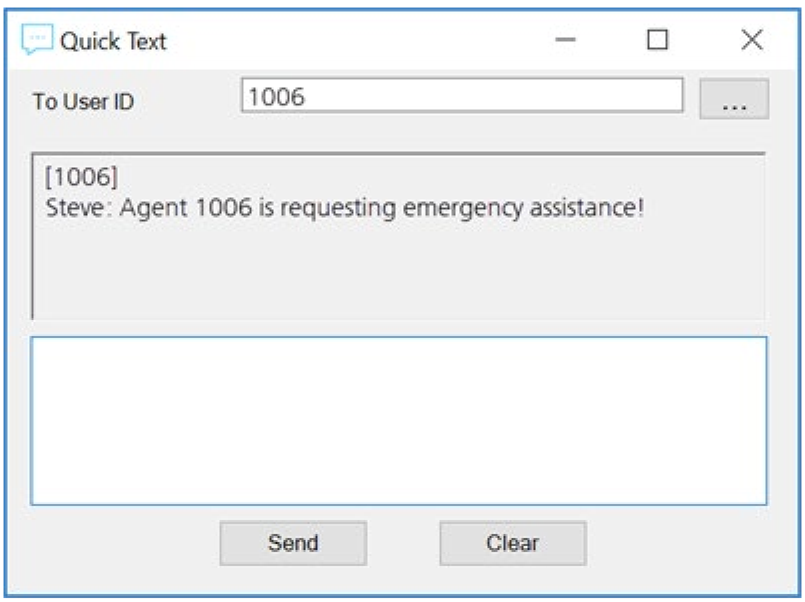


Emergency

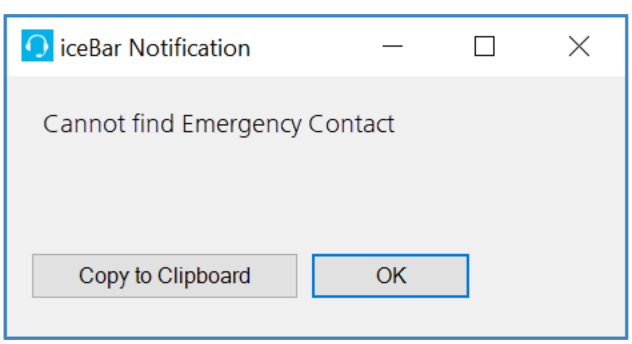
When the Emergency Contact class of service feature is enabled for a user in iceAdministrator, ice considers the user to be an emergency contact. ice looks for an emergency contact when a user clicks the *Emergency* button on iceBar to request emergency assistance.

To receive notification of an emergency request, the emergency contact must be logged on to iceBar and must belong to one of the same queues as the requesting user. ice scans for the emergency contact that is in the Ready state and has been idle for the longest period of time. If no emergency contacts are found in the Ready state, ice scans for the emergency contact that is logged on (i.e., in any state other than Ready state) and has been idle for the longest time.

When a suitable emergency contact is found, ice sends a message to the emergency contact through iceBar, as shown below:

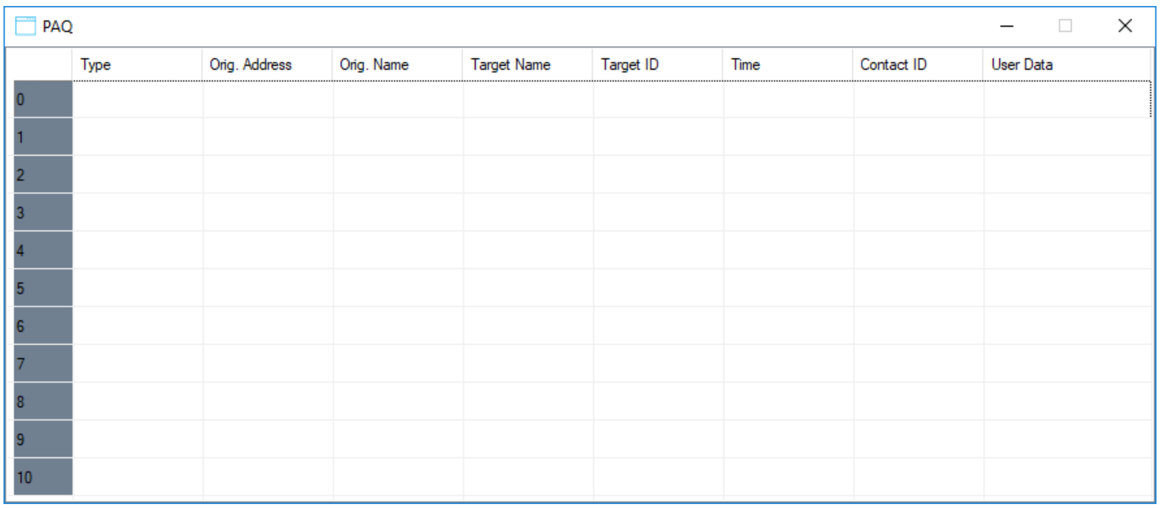


When no emergency contact can be found, the requesting user receives the message shown below:



Personal Access Queue (PAQ)

When you are handling a contact or in the Not Ready state, your Personal Access Queue (PAQ) is a holding place for direct contacts. The PAQ window displays the contact that you are currently handling, but also displays contacts waiting in your PAQ. You may pick up contacts that are waiting in your PAQ, and you may also use the PAQ window to Park calls. To open your PAQ, click the *PAQ* button on iceBar. For more information, refer to Chapter 4: Personal Access Queue



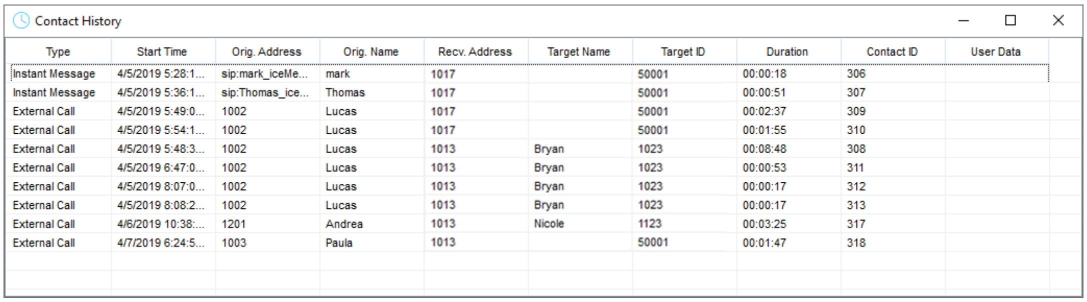
Note:

- If you have the Waiting Beep class of service feature enabled for your user profile, you hear a Play Call Waiting Tone in your handset or headset when a call is placed in your PAQ. If you have two calls waiting, you hear two Play Call Waiting Tones, for three calls waiting you hear three Play Call Waiting Tones, 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.
- When the user has a contact in PAQ position 0, the Place Call, Start IM, Start SMS and the Start Email buttons are disabled.

Contact History

Contact History

Contact History stores information about recently handled or missed contacts. This can include clients that you have called, contacts that you have received from queue, or direct contacts received.


Contact History

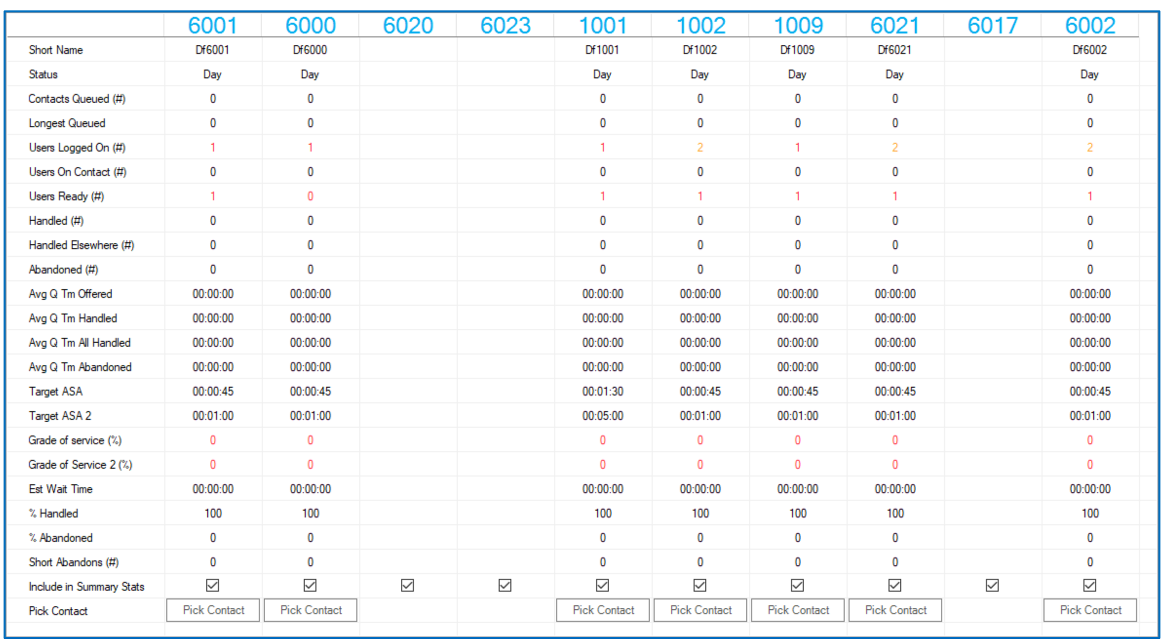
Type	Start Time	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Duration	Contact ID	User Data
Instant Message	4/5/2019 5:28:1...	sip:mark_iceMe...	mark	1017		50001	00:00:18	306	
Instant Message	4/5/2019 5:36:1...	sip:Thomas_ice...	Thomas	1017		50001	00:00:51	307	
External Call	4/5/2019 5:49:0...	1002	Lucas	1017		50001	00:02:37	309	
External Call	4/5/2019 5:54:1...	1002	Lucas	1017		50001	00:01:55	310	
External Call	4/5/2019 5:48:3...	1002	Lucas	1013	Bryan	1023	00:08:48	308	
External Call	4/5/2019 6:47:0...	1002	Lucas	1013	Bryan	1023	00:00:53	311	
External Call	4/5/2019 8:07:0...	1002	Lucas	1013	Bryan	1023	00:00:17	312	
External Call	4/5/2019 8:08:2...	1002	Lucas	1013	Bryan	1023	00:00:17	313	
External Call	4/6/2019 10:38:...	1201	Andrea	1013	Nicole	1123	00:03:25	317	
External Call	4/7/2019 6:24:5...	1003	Paula	1013		50001	00:01:47	318	

Any previous call from your Contact History can be called. To open Contact History, click the Contact History button on the iceBar toolbar or right-click and select *Contact History* from the menu. For more information, refer to Chapter 3: Contact History.

Queue Statistics

Queue Stats

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 toolbar or right-click and select Queue Stats from the menu. For more information, refer to Chapter 5: Queue Statistics.



	6001	6000	6020	6023	1001	1002	1009	6021	6017	6002
Short Name	Df6001	Df6000			Df1001	Df1002	Df1009	Df6021		Df6002
Status	Day	Day			Day	Day	Day	Day		Day
Contacts Queued (#)	0	0			0	0	0	0		0
Longest Queued	0	0			0	0	0	0		0
Users Logged On (#)	1	1			1	2	1	2		2
Users On Contact (#)	0	0			0	0	0	0		0
Users Ready (#)	1	0			1	1	1	1		1
Handled (#)	0	0			0	0	0	0		0
Handled Elsewhere (#)	0	0			0	0	0	0		0
Abandoned (#)	0	0			0	0	0	0		0
Avg Q Tm Offered	00:00:00	00:00:00			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00
Avg Q Tm Handled	00:00:00	00:00:00			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00
Avg Q Tm All Handled	00:00:00	00:00:00			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00
Avg Q Tm Abandoned	00:00:00	00:00:00			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00
Target ASA	00:00:45	00:00:45			00:01:30	00:00:45	00:00:45	00:00:45		00:00:45
Target ASA 2	00:01:00	00:01:00			00:05:00	00:01:00	00:01:00	00:01:00		00:01:00
Grade of service (%)	0	0			0	0	0	0		0
Grade of Service 2 (%)	0	0			0	0	0	0		0
Est Wait Time	00:00:00	00:00:00			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00
% Handled	100	100			100	100	100	100		100
% Abandoned	0	0			0	0	0	0		0
Short Abandons (#)	0	0			0	0	0	0		0
Include in Summary Stats	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
Pick Contact	Pick Contact	Pick Contact			Pick Contact	Pick Contact	Pick Contact	Pick Contact		Pick Contact

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.

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).

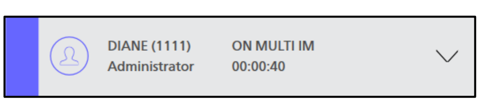
Note:

- 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 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.

Multi-Contact User States	
Sidebar Display	**Description**
	**On Multi Email:** User is currently handling an Email. In this state, the user could be handling multiple Emails.
	**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.

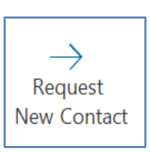
Handling Multiple Contacts

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.

<u>Request New Contact:</u>



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.

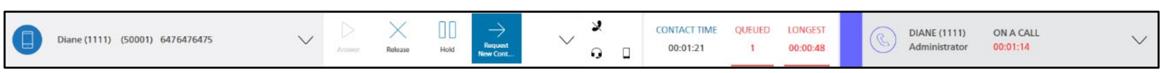
For example, if a user is handling a voice call, the user will not automatically be alerted to any other contacts even though they are configured for multi-contact handling. The user must select the *Request New Contact* button on their iceBar to be alerted for another contact to handle at the same time.

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 more information on adding the button to the iceBar, refer to the iceManager User Manual.

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

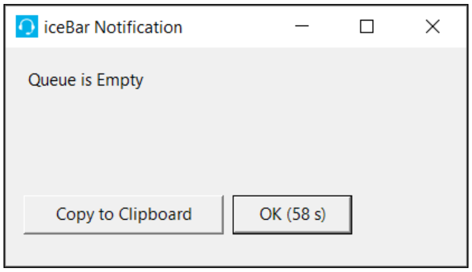
1. When you are ready to handle another contact at the same time, select the *Request New Contact* button on your iceBar.



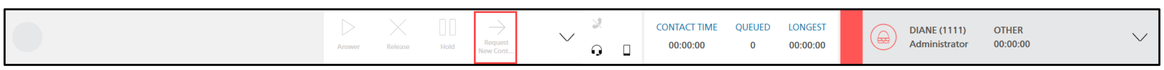
2. You will be alerted for the next available contact.

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.



<u>Using the Toolbar to Handle Multiple Contacts</u>

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 for 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.

Note: When a user is in multi-IM state and goes on call, the conference button will be enabled.

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

Clicking on the icePhone button on the iceBar toolbar 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 desktop.

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

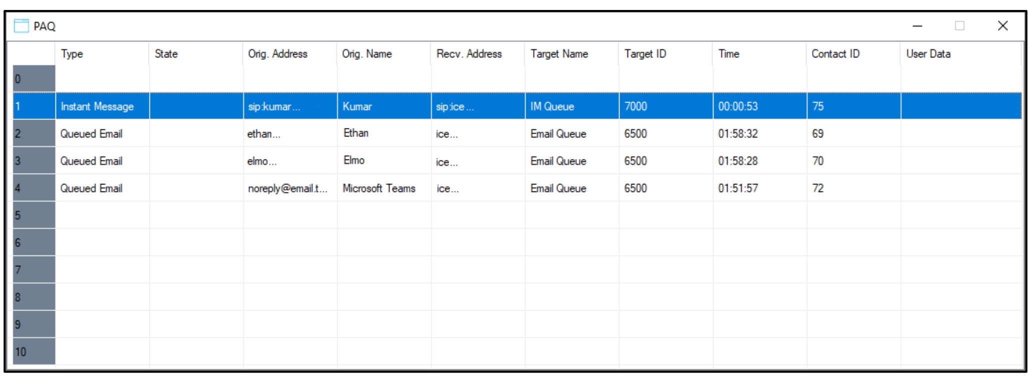
Note: Closing the chat window does not end the chat. If you close the chat window during your chat, you can reopen the window at any time by clicking on the icePhone button.

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 Personal Access Queue

When a user is handling multiple contacts simultaneously, the PAQ can be used to manage the contacts.

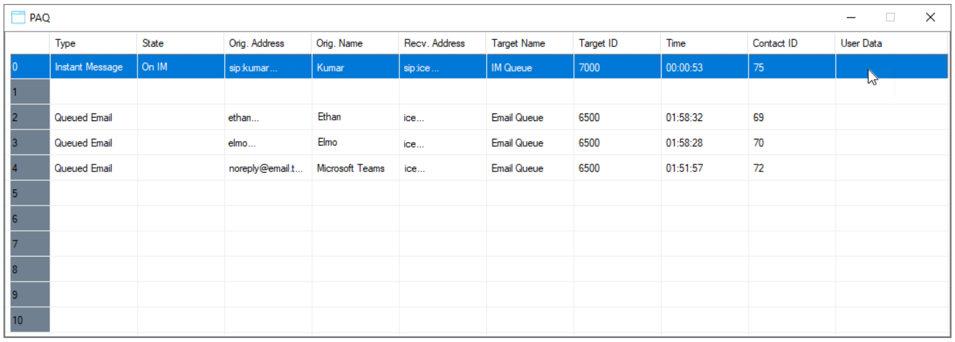
To change the toolbar's focus to another contact, select the row with the contact you want to change the focus to.


PAQ

	Type	State	Orig. Address	Orig. Name	Recv. Address	Target Name	Target ID	Time	Contact ID	User Data
0										
1	Instant Message		sip:kumar...	Kumar	sip:ice...	IM Queue	7000	00:00:53	75	
2	Queued Email		ethan...	Ethan	ice...	Email Queue	6500	01:58:32	69	
3	Queued Email		elmo...	Elmo	ice...	Email Queue	6500	01:58:28	70	
4	Queued Email		noreply@email.t...	Microsoft Teams	ice...	Email Queue	6500	01:51:57	72	
5										
6										
7										
8										
9										
10										

If your profile is configured for multi-contact handling, you can use Row 0 within the PAQ to stop the system from alerting you for an additional queued voice contact.

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



Note: This will not prevent the system from alerting you for additional IM or email contacts. To stop the system from alerting you for any additional contacts, set your state to **Pending Not Ready** by selecting the Not Ready button while you are handling your current contact(s).

For more information on the PAQ, please refer to Chapter 4: Personal Access Queue.

Chapter 8: iceCampaign

This chapter provides a general description of how users can access prospects that are part of existing outbound calling campaigns.

A **campaign** is an organized strategy for contacting multiple **prospects** to fulfill an objective, such as making a sale or delivering a key message. Prospects are the people that you wish to contact as part of the campaign. Prospects might be existing clients, or they might represent a new market for your company.

Note: Features of iceBar are customizable. iceCampaign is an add-on feature. Features discussed in this chapter may not be included with your configuration of iceBar.

The iceCampaign solution is comprised of two applications:

1. iceCampaign allows users to access prospects that are part of existing campaigns. This application is accessed through iceBar and is explained in the sections that follow.
2. iceCampaign Administrator is the administration portion of iceCampaign – it is where you would create, edit, and delete campaigns. For more information on iceCampaign Administrator, refer to the *iceCampaign User Guide*.

Dialing Modes

Before discussing what iceCampaign does, it is important that you understand the different types of outbound dialing that ice supports. ice supports three: preview, progressive, and predictive.

Preview Dialing

Preview dialing allows a user to retrieve the next prospect in a campaign, view details about the prospect, and initiate a call to the prospect. Unlike a manual campaign, users using preview dialing do not have to key in a telephone number. This ensures that calls are dialed accurately each time. Calls are not automatically placed when Preview dialing is used.

A user performs preview dialing simply by pressing *Get Next* on the application window. The next prospect's contact information is displayed on the user's screen. From here, the user can preview the information and decide whether to call this prospect. Pressing the *Call* button automatically places a call to the prospect. If they reach a live person, they proceed with their interactive script that is displayed on their screen. At the end of the call, the user updates iceCampaign with the prospect's final disposition or outcome.

For information on how a user can logon to a Preview campaign, refer to page 314.

Progressive Dialing

Progressive dialing automatically initiates a call on behalf of a user whose state in iceBar is Ready state and who has subscribed to one or more campaigns. A call is placed to the prospect waiting the longest with the highest priority in the iceCampaign waiting list (across the campaigns that the user has subscribed to).

When a call is placed on the user's behalf, the user may hear ring back and will be able to speak with the prospect when the call is answered. Alternatively, depending on configuration, the user may be able to speak immediately with the prospect. Filtering is available to screen out busy signals, SIT tones, and voicemail.

Prospect information is automatically displayed in the iceCampaign application window and the script frame will launch any customized script defined for the prospect's campaign type.

Users will automatically have their iceBar state set to Not Ready state as soon as the call is placed by iceCampaign.

The user decides the next action based on the outcome of this call. If a live party answers the call, the user proceeds with their interactive script. At the end of the call, the user updates the campaign database with the prospect's final disposition using the appropriate iceCampaign client disposition button.

Users will need to put themselves into Ready state in iceBar in order to receive an inbound call or start the timer for the next progressive-dialed call. This will allow users to perform post-call wrap up.

For more information on how a user can logon to a Progressive campaign, refer to page 316.

As an alternative to presenting automatically dialed prospects to users, you may also choose to play a message to a prospect, as described in the section that follows.

Predictive Dialing

Predictive Dialing automatically calls a list of telephone numbers in sequence and screens out no-answers, busy signals, answering machines, and disconnected numbers while predicting when a user will be available to handle the next call.

When the system detects a live answer, it registers the call-in queue for the next user. The pacing algorithm works to provide the highest probability that a user is ready to speak with the live prospect. An iceCampaign screen pop-up occurs when a user answers the call.

For more information on how a user can logon to a Predictive campaign, refer to page 316.

As an alternative to presenting automatically dialed prospects to users, you may also choose to play a message to a prospect or combine playing a message with providing the option for the prospect to speak with a user during business hours. 'Play Message' is described in the section that follows.

The Pacing Algorithm

The pacing algorithm is a customizable workflow application that analyzes real-time statistics and dialing trends to determine the number of simultaneous calls to attempt.

The ideal pacing algorithm ensures that a user becomes available just as a customer/prospect answers the call.

Many more calls are placed than available users, in order to compensate for all of the call attempts that result in busy, no answer, out of service, etc.

The following criteria are taken into account for an optimal pacing algorithm:

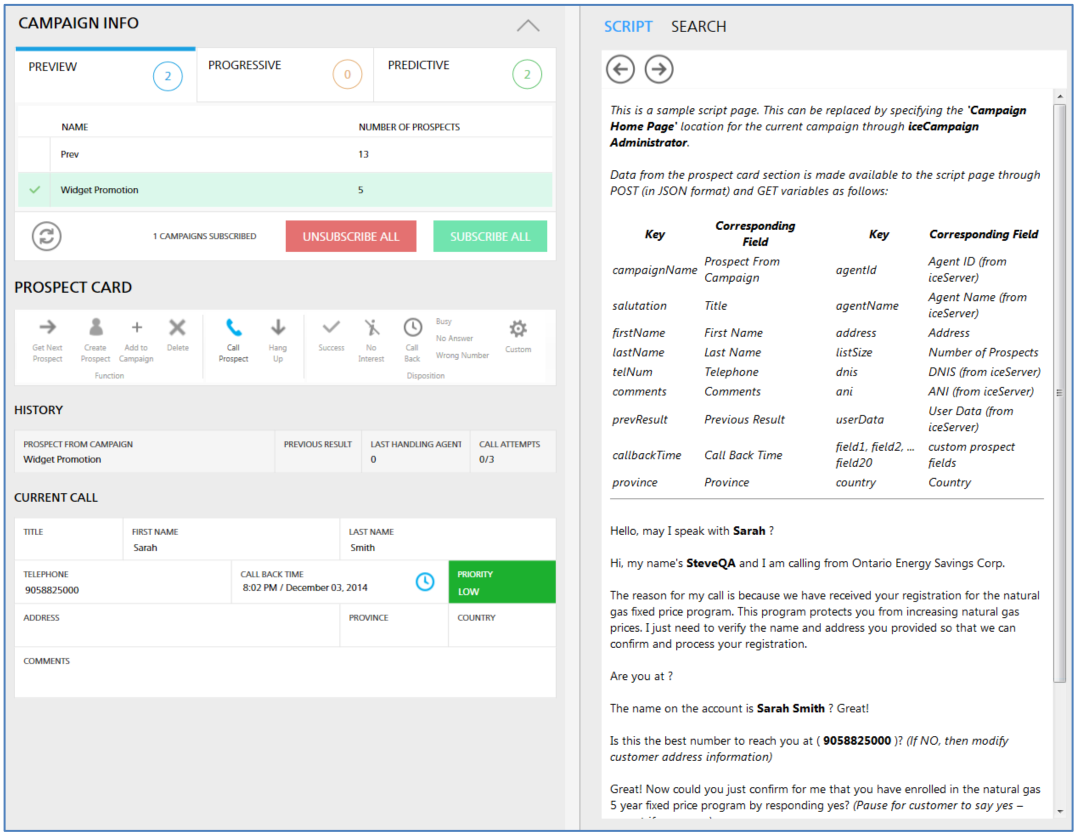
- Queue grade of service (number of live respondents handled in less than the target ASA/number of live respondents queued)
- Estimated wait time
- Number of users logged on
- Number of users ready
- Number of calls queued
- Age of oldest queued call
- Number of call attempts in progress
- Percentage of overruns (pace exceeds user availability rate)
- Percentage of connects

The pacing algorithm can be tweaked in Workflow Designer. For more information, refer to the iceWorkflow Designer User Manual.

Now that you have an understanding of the different dialing modes and pacing algorithms, you are ready for the next section – iceCampaign User.

iceCampaign User

iceCampaign User is a browser-based application that allows a user to access prospects that are part of existing campaigns, as shown below. This component of iceCampaign is accessible to users through the iceBar software, using the iceCampaign button.



The iceCampaign User interface has three sections:

- **Campaign Info:** Where the user can see a list of prospects for each type of campaign.
- **Prospect Card:** Shows the user information about their active prospect. It also contains a series of buttons that users can use to handle a prospect in the campaign.
- **Script and Search:** Script for handling the prospect. This script is associated with a specific campaign and is customizable. The search option allows you to search for a specific phone number.

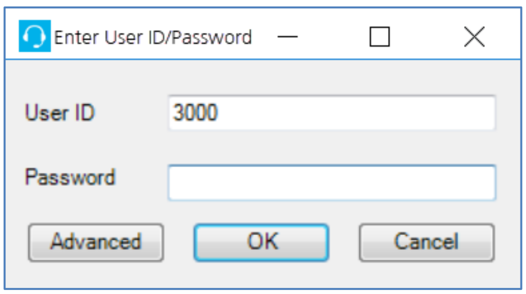
This chapter dedicates a section to each of the following topics: components of iceCampaign User, logging on and managing outbound campaigns, inbound campaigns, and creating and moving prospects between campaigns.

Note: iceCampaign supports users in multiple time zones.

Logging On to iceCampaign User

To participate in a campaign, you must first launch iceBar and iceCampaign user, as described in the steps below:

1. Double-click the iceBar icon on your desktop.
2. You will be prompted to enter a User ID and Password.



3. Enter your four-digit User ID in the User ID field.
4. Enter your password in the Password field.
5. Click OK or hit Enter on your keyboard.

iceBar will now appear on your screen.

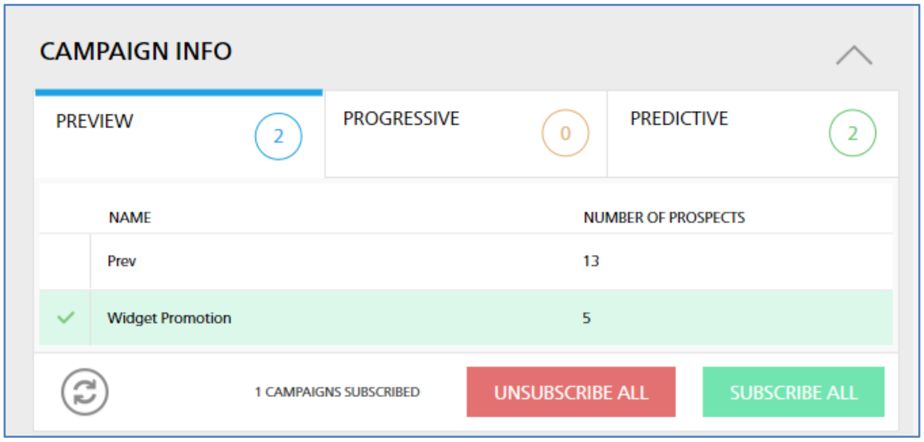
6. Click the iceCampaign button on the toolbar.

iceCampaign User appears.

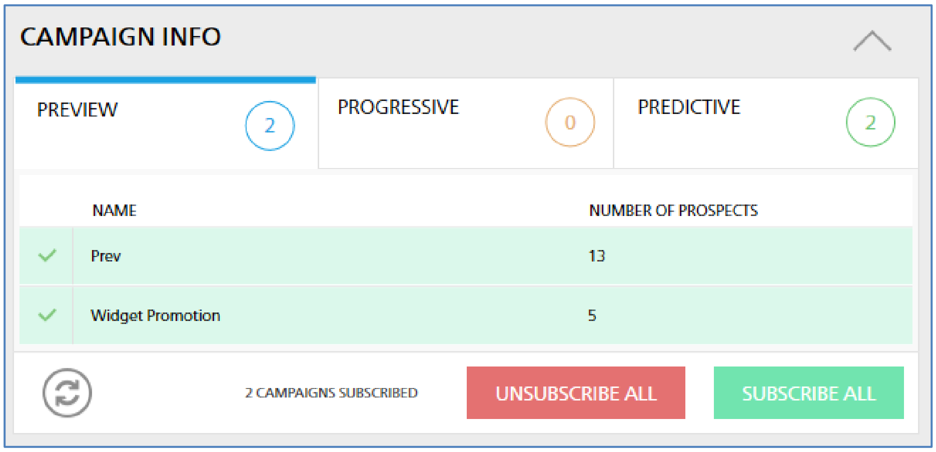
Adding campaigns to your call list – Preview Campaigns

To add a campaign to your calling list, you need to first subscribe to it. To subscribe to a campaign, follow the steps below:

1. To subscribe to a campaign, select the campaign(s) for which you wish to make calls. Once you have selected a campaign, a green arrow should appear in the column to the left of the campaign name.

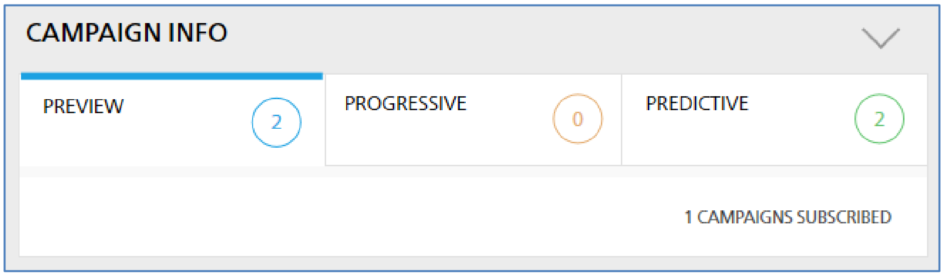


2. You can subscribe to as many as you need, by clicking the *Subscribe All* button or selecting individual campaigns.



You are now ready to begin a Preview Campaign.

Note: You can minimize the campaign list by clicking the upward pointing arrow on the far right to minimize the list.

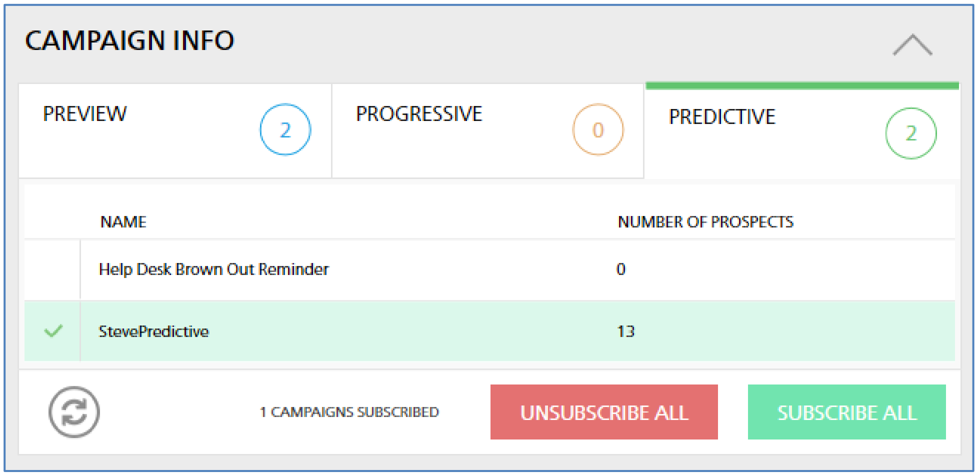


Adding campaigns to your call list – Progressive and Predictive Campaigns

When you use iceCampaign in the Progressive or Predictive mode, you can only subscribe to one campaign type at a time. If you subscribe to another campaign, you will be automatically unsubscribed from the previous campaign. If you are using iceCampaign in Preview mode, you may logon to multiple campaigns.

To add a Progressive or Predictive campaign to your calling list, you need to first subscribe to it. To subscribe to a campaign, follow the steps below:

1. To subscribe to a Progressive campaign, select the Progressive tab. To subscribe to a Predictive campaign, select the Predictive tab. In the list, find and select the campaign(s) that you wish to subscribe to. Once you have selected a campaign, a green arrow should appear in the column to the left of the campaign name.
2. You can subscribe to as many campaigns of the same type as you need, by clicking the Subscribe All button or by selecting individual campaigns.


CAMPAIGN INFO
PREVIEW
2
PROGRESSIVE
0
PREDICTIVE
2
NAME
NUMBER OF PROSPECTS
Help Desk Brown Out Reminder
0
StevePredictive
13
1 CAMPAIGNS SUBSCRIBED
UNSUBSCRIBE ALL
SUBSCRIBE ALL

You are now ready to begin a Campaign.

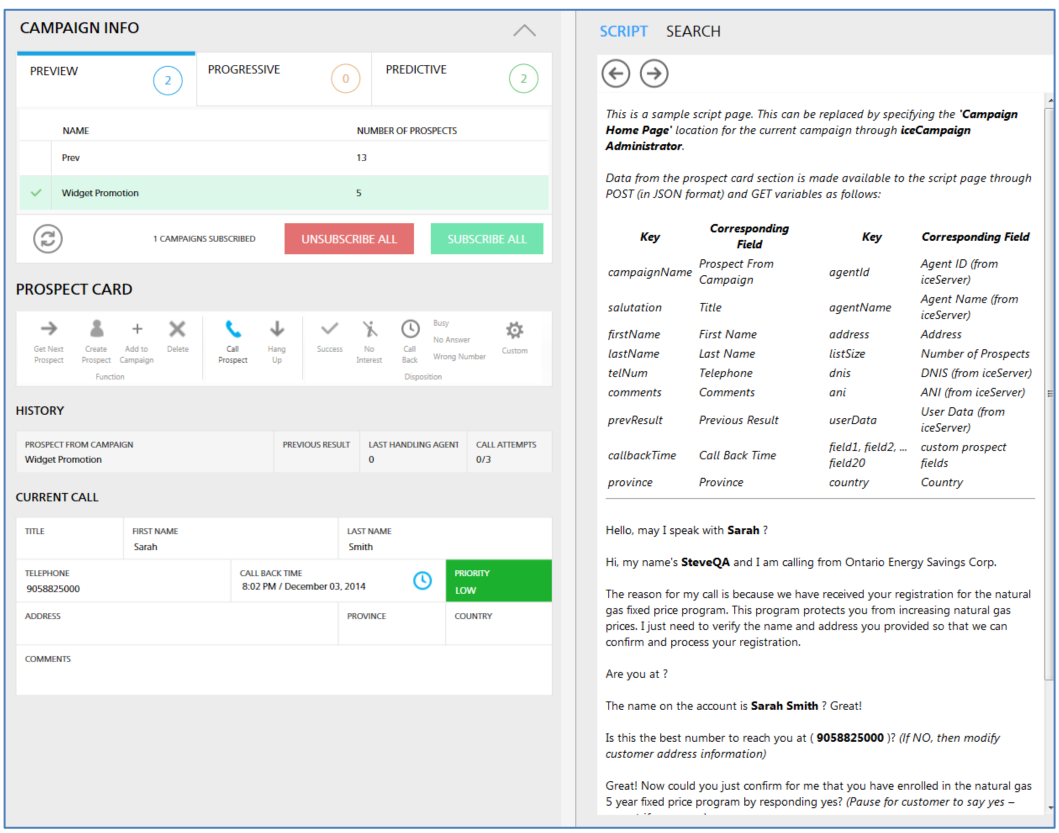
If you are also required to take calls from inbound queues (i.e., queues that are not associated with a campaign), log on to the queues using the Logon button on iceBar. Refer to

Logon Procedures on page 18 for more information.

In this section, you have learned how to subscribe to a campaign. If your contact center is using Preview dialing, the user can now retrieve the next prospect in the campaign, as described on page 297. If your contact center is using Progressive or Predictive dialing, the iceCampaign user will automatically place a call to the next prospect in the campaign each time he or she enters the Ready state. When the call is complete, the user can determine the outcome of the call, as described on page 316 and 298.

Components of iceCampaign User

To manage campaigns, you must first be comfortable navigating iceCampaign User. As shown below, iceCampaign User is a browser-based application comprised of three frames that show campaign information, prospect information, and a script unique to the campaign.

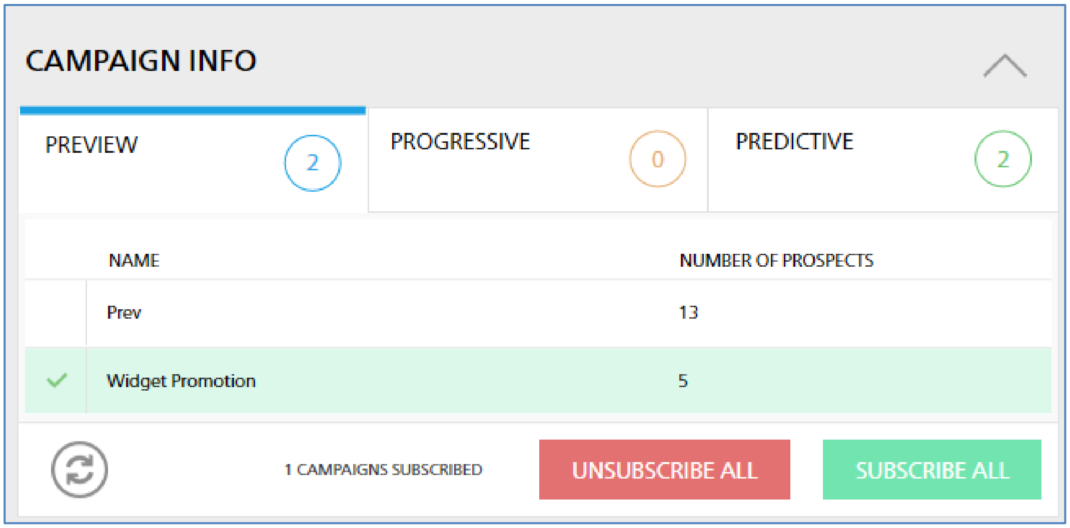


Campaign Info

Under Campaign Info, you can select the type of campaign to initiate.

Campaigns are stored based on type – preview, progressive, and predictive. For more information about each, refer to Dialing Modes.

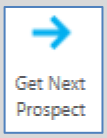
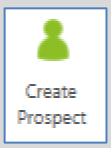
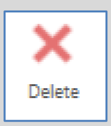
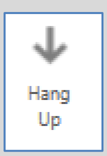
The number of campaigns under each type is denoted by the colored number in the circle. As you can see, under Preview, there are two campaigns – Prev and Widget Promotion. The number of prospects for each campaign is also listed.

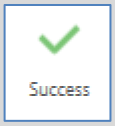
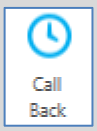
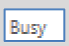
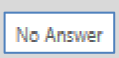


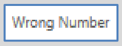
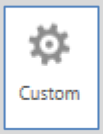
Prospect Card

The Prospect Card consists of a series of buttons that users can use to handle a prospect in the campaign. It also displays information about your active prospect.

The table below describes the buttons found in the Prospect Card. The fields that are found in the Prospect Card are described in the table after.

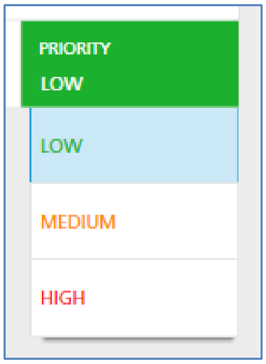
Control Frame		
Button	**Button Name**	**Description**
	Get Next Prospect	Retrieves the next prospect from the campaign. This option is only available for campaigns that are in the Preview mode.
	Create Prospect	Creates a new prospect.
	Add to Campaign	Assigns the contact that you are currently viewing in the Prospect Details frame to another campaign. **Note:** Existing prospects who are added to a new campaign will be contacted again.
	Delete	Remove contact from the campaign after they have been called. Since this is a disposition button, it is only available after the call is completed.
	Call Prospect	Makes a call to a prospect that you have retrieved from a Preview campaign.
	Hang Up	End the call.

Control Frame		
Button	**Button Name**	**Description**
	Success	Tags the result of the call as ‘Prospect Contacted Successfully’. Removes prospect from waiting list. Since this is a disposition button, it is only available after the call is completed.
	No Interest	Tags the result of the call as ‘Prospect Not Interested.’ Removes prospect from waiting list. Since this is a disposition button, it is only available after the call is completed.
	Call Back	Schedules a new call back time/date for the prospect, as specified by the user. Pressing this button will activate the calendar in the Prospect Card frame for call back date selection.
	Busy	Tags the result of the call as busy. The prospect is scheduled for call back in ten minutes. Since this is a disposition button, it is only available after the call is completed. The call back time for a busy prospect can be modified in the ‘Busy Retry Time’ field in iceCampaign Administrator. For more information, refer to the iceCampaign Administrator User Manual.
	No Answer	Tags the result of the call as no answer. The prospect is scheduled for call back in sixty minutes. Since this is a disposition button, it is only available after the call is completed. The call back time for a prospect that does not answer can be modified in the ‘No Answer Retry Time’ field in iceCampaign Administrator. For more information, refer to the iceCampaign Administrator User Manual.

Control Frame		
Button	**Button Name**	**Description**
	Wrong Number	Tags the result of the call as wrong number. The prospect is removed from the waiting list. Alternatively, the user could update prospect information. Since this is a disposition button, it is only available after the call is completed.
	Custom	Similar to a Web Browser's *Back* button, it returns to the previous page in the Script frame, if applicable.

The fields that are found in the Prospect Card are described in the table after.

Prospect Card Fields	
Field Name	**Description**
Prospect from Campaign	Name of the campaign this prospect is under.
Previous Result	Not editable by current handling user. This field contains notes from the previous user.
Last Handling User	The user ID of the last user that dealt with this prospect. If no user has handled the prospect, this is empty. This field cannot be edited.
Title	Salutation of prospect.
First Name	First name of prospect.
Last Name	Last name of prospect.
Telephone	Telephone number of prospect.
Callback Time	Displays the callback time. When a prospect is imported or created, the callback time is set. When a prospect is in the Prospect Details frame, a user can modify the callback time by clicking the 'Schedule a New Callback Time' button.
Call Attempts	The number of attempts made to contact the prospect. By default, the maximum number of call attempts is three. This can be changed in iceCampaign Administrator by a user with the appropriate credentials.
Address	Mailing address of the prospect.
Comments	Comments about the prospect can be entered in this field. The purpose is to provide users with information about the caller, so that they can deliver more personalized services.

Prospect Card Fields	
Field Name	**Description**
Priority	By default, priority for prospects is Low. This can be changed by clicking on the Priority field and selecting Low, Medium, or High. The box changes to the color associated with each priority level – green for Low, yellow for Medium, and red for High. 

This frame can be customized for up to twenty customizable fields (e.g., Account Number). Users can lock custom fields to prevent editing. For information on adding customized fields, refer to the iceCampaign Administrator manual.

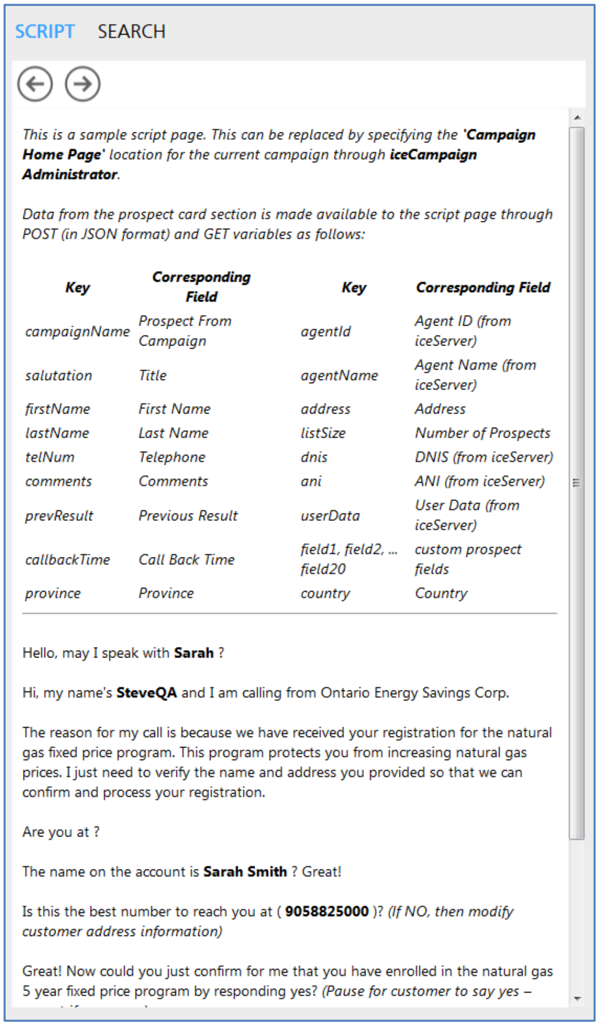
Script and Search

By default, the Script and Search frame shows the Script tab, which consists of an HTML script associated with the campaign. Generally, this script is used as a guide to help users discuss all the required topics with the prospect.

For example, your contact center may use iceCampaign to conduct a survey. In this scenario, the campaign script would consist of a series of questions that users must ask each prospect. The user can select to input answers in the comment field or in the appropriate application.

Usually each campaign has its own script, which can be designed by anyone who can create HTML scripts. If your contact center uses inbound campaigns, the script appears as you receive calls with the DNIS associated with the campaign.

The script can be customized to show what you want to show the users during their call. Below is a screenshot of a sample script.



The Search functionality allows users to search for phone numbers, to see if an inbound caller is associated with an outbound campaign. Users can load disposed prospects and disposition any contact from the search section.

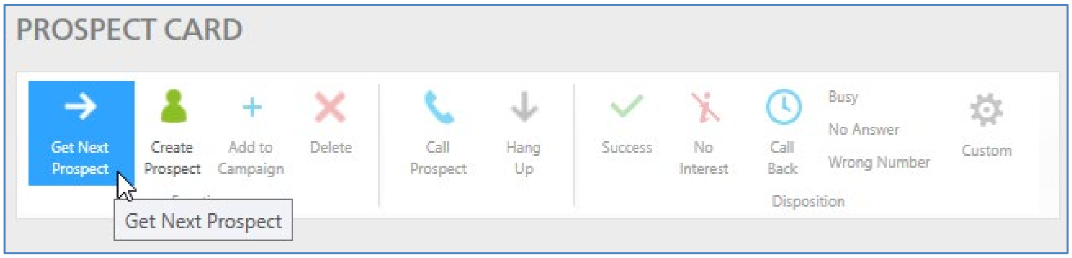
Note: If a contact is in multiple campaigns, each campaign will be displayed.

Preview Mode – Calling a Prospect

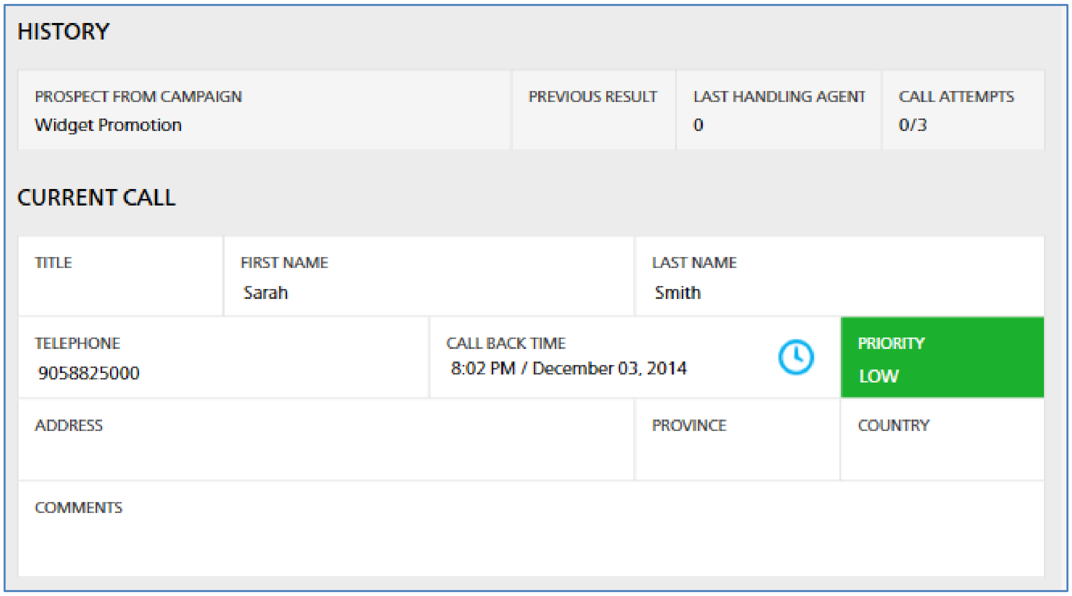
For Preview mode campaigns, once you have selected a campaign, you must then retrieve the next prospect in the campaign. After viewing information about the selected prospect, you may decide to place a call to that prospect.

To select and then call a prospect:

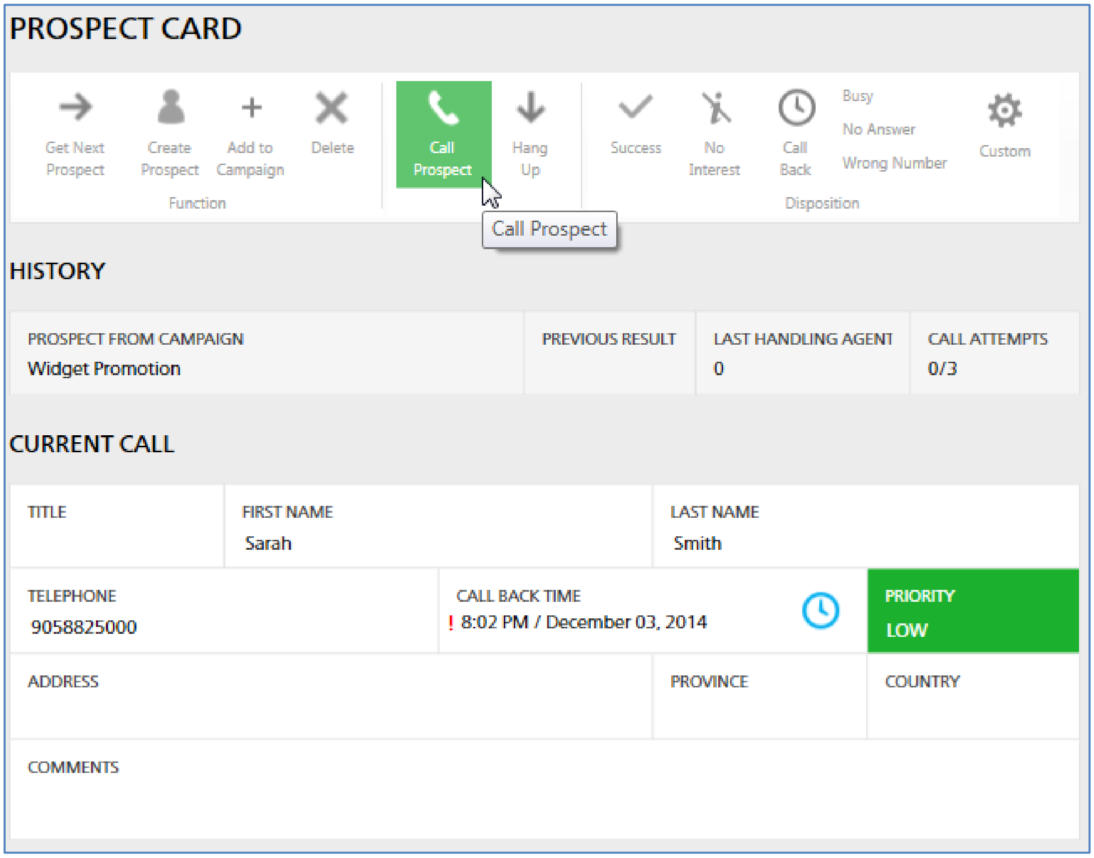
1. Click the *Get Next Prospect* button in the Prospect Card section of iceCampaign User.



The Prospect Card changes to reflect information about the active prospect.



2. Click Call Prospect on the Prospect Card to initiate a call to the active prospect.



3. When the call is complete, click Hang Up on the Control Frame. The call also automatically terminates when the prospect hangs up.

Select the appropriate Disposition Code. Users using any of the three modes are put into Not Ready state until the disposition code has been selected. Users in Preview mode must select a Disposition code before the Get Next Prospect button is active.

For more information, refer to section Determining the Outcome of a Call.

Progressive and Predictive Mode – Calling a Prospect

For Progressive and Predictive Mode campaigns, ice will automatically place a call on your behalf to the next prospect in the campaign each time you enter the Ready state. When the call is complete, you can determine the outcome of the call, as described on page 316.

You will need to set your iceBar state to Ready state in order to receive an inbound call or to start the timer for the next progressive-dialed call.

Inbound Campaigns – Receiving a Call from a Prospect

A campaign can be inbound, meaning that a published phone number, when dialed by a prospect, causes a script associated with a particular campaign to pop on the receiving user's screen. The user can then proceed to cover all the topics outlined in the script with this caller.

For a user to receive a call from an inbound campaign, they must be in a Ready state. When a call associated with the inbound campaign is received by a user, iceCampaign will pop up and the appropriate campaign information (e.g., script, prospect details) will populate the user's screen. When the call is complete, the user can determine the outcome of the call, as described on page 316.

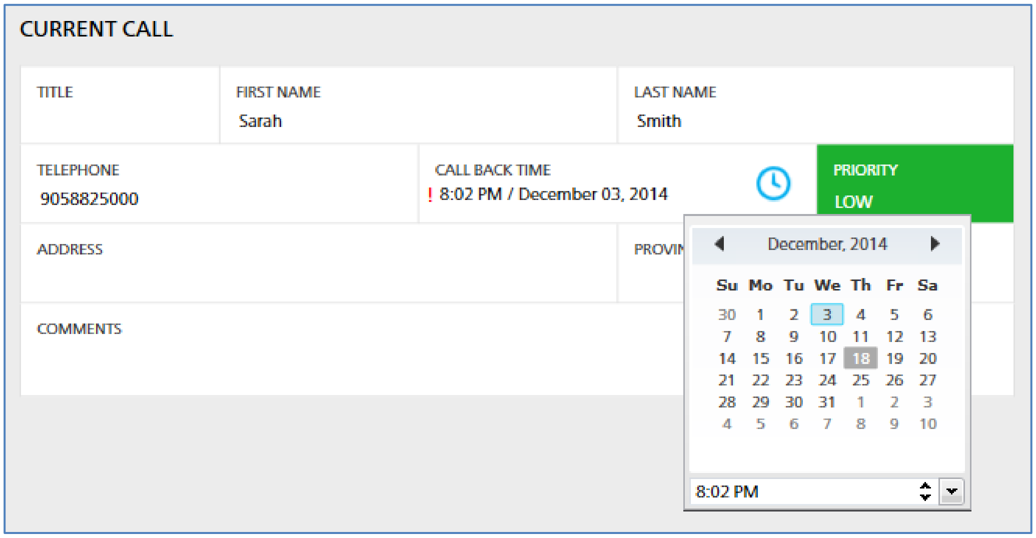
Determining the Outcome of a Call

When a call is completed, you must choose a button on the Control Frame that best suits the outcome of the call that you just handled. For example, you might select *Prospect Not Interested*.

The buttons available are:

- Success – the prospect was contacted successfully;
- No Interest – the prospect was not interested;
- Call back – call the prospect at another time;
- Busy – the user experienced a busy tone;
- No Answer – the prospect did not answer the phone;
- Wrong number – the number reached someone other than the intended prospect; and
- Custom – select the appropriate code from the list. Custom codes are created in iceCampaign Administrator. For more information on iceCampaign Administrator, refer to the iceCampaign Administrator User Manual.

When a button is selected, no further action is required, unless you have selected 'Schedule a new contact time'. When this button is selected, a window appears allowing you to select a new callback time, as shown below.



Select a date and time that the prospect should be called back. Click anywhere to close the calendar.

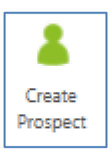
Once an action has been selected, you can receive the next prospect and repeat the process of handling the call and selecting the disposition that best reflects the outcome of the call.

Creating a Prospect

At any time, you may use iceCampaign User to add a new prospect to a campaign. A prospect's last name and telephone number are the only required fields.

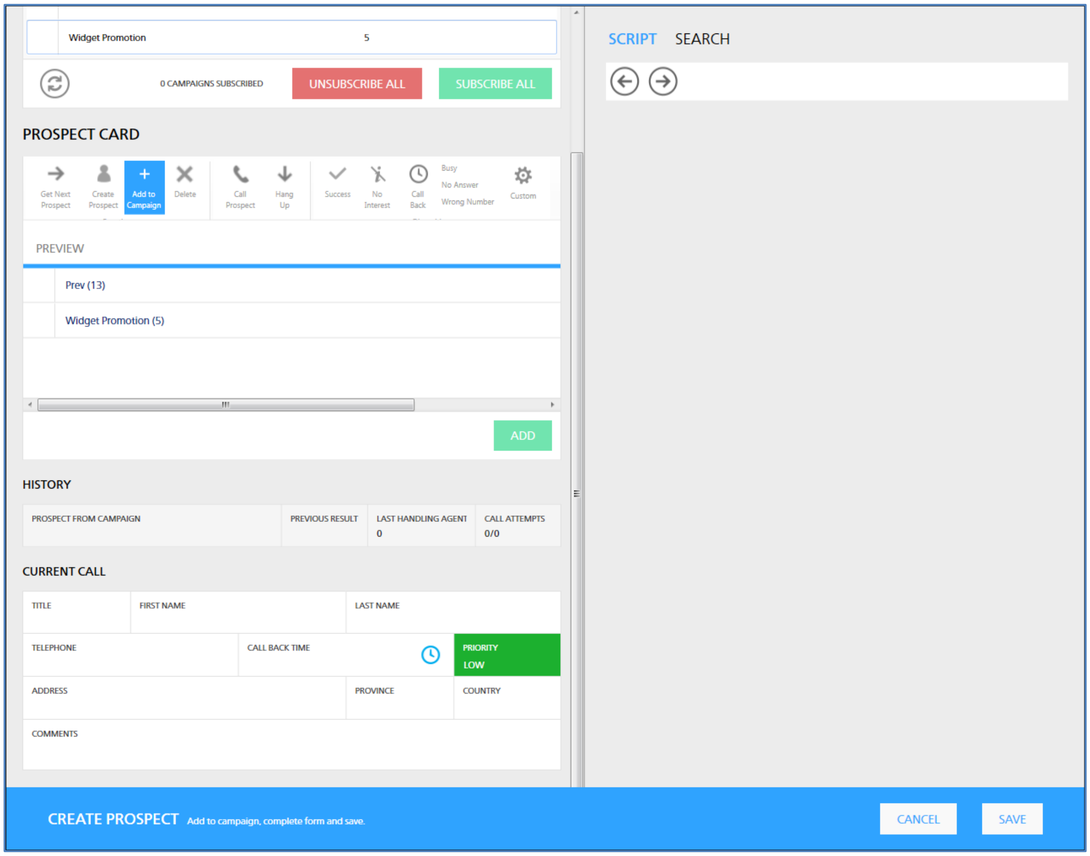
To manually add a prospect to a campaign:

1. Highlight the campaign in which you wish to add the contact.
2. Click the Create Prospect button.



By default, the Add to Campaign button becomes highlighted. To add the prospect to a campaign or multiple campaigns, click the name to highlight it and click Add.

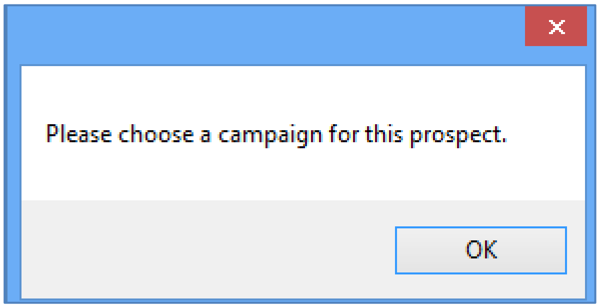
3. Fill in the fields and change the priority as needed.



Refer to the section on the Prospect Card for information on the type of information that goes in each field.

4. Click Save to save the information on the prospect.

If you try to save this prospect without adding the prospect to a campaign, a ‘Please choose a campaign for this prospect’ message appears:



Click *OK* and add the prospect to the appropriate campaign(s).

You have added a single prospect to a campaign. If you have a large number of prospects to add to the campaign, you may want to import a list of prospects. For more information about importing a list of prospects, refer to the iceCampaign Administrator User Manual.

Appendix A: Global Settings

Many features of iceBar are controlled by global settings in iceManager settings. 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

Server Profiles

Configuring all or part of an ice server profile in iceManager settings configuration groups means that individual users do not have to fill this information in on start-up. Anything that is common to all users on a system, such as a switch ID, server address, and server port should be specified here. This is also where the upgrade location is specified, which is the address that iceBar will check when a new version is required by the server.

Email Options

Configuring items in this section allows email notification preferences to be set for all users on a server, for example, enabling missed emails for all users to their email address as specified in iceAdministrator. SMTP server location credentials and custom mail formats can also be defined in this section.

Not Ready Reasons

By default, Not Ready Reasons are displayed when the user toggles from the Ready state to the Not Ready state, as described on page 185.

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 appears in the tool tip 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 in the global settings if they are not required. This will allow users to toggle between the Ready state and Not Ready state without selecting a reason. You can also see other user's selected not ready reason in the ice directory line.

Note: Once a Not Ready Reason has been added or modified, you will have to restart iceBar 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 277.

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 reasons can be added.

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

For more information, 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 an LOB code.

The settings can be configured so that LOB codes are forced. With this setting, the user must select an 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.

Button Settings

The layout of the iceBar buttons can be customized for all users.

Customizations include the visibility of buttons, the button images, and the button display names/tooltips.

Application Settings

This section can be used to control the appearance of iceBar in various locations. Some of the options that can be set include the position of the standalone toolbar, or the size of the individual toolbar sections.

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 global 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.

Notification Preferences

By default, the Toast Window pops up on the user's monitor each time they receive a call.

The settings can be configured in several different ways. For example, the PAQ window can pop up on receipt of a call, or the Toast Window can pop for emails, but for calls, there is no pop-up.

Form Settings

Sections exist where settings for each displayed window can be specified, including the PAQ, Queue Stats, and Contact History. Here, preferences such as the visible fields, thresholds, and field order can be specified.

Custom Strings

For any displayed text in iceBar, the value of the text can be changed; for example, the 'User Data' field can be renamed to 'Account Number'.

Note: There is a limit to the size of some strings based on the layout of a dialog box, so it is recommended that any changes to these fields be tested on a local machine before making changes to the global configuration.

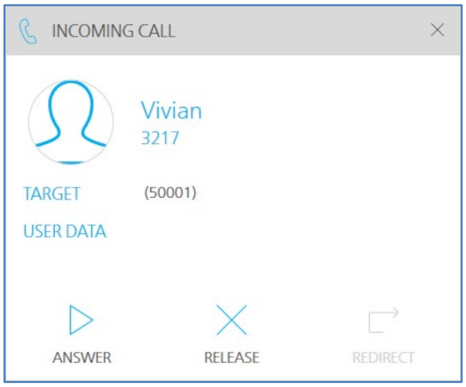
Appendix B: Microsoft Teams

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

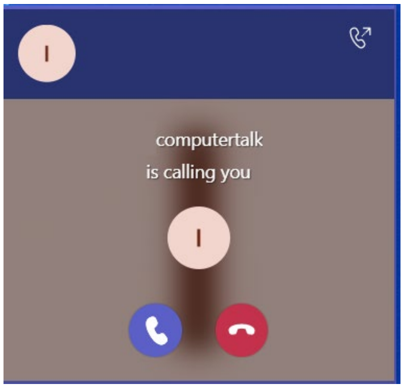
Notification

iceBar provides a toast window notification for incoming contacts, as described on page 79. Microsoft Teams also has a toast window.

iceBar Toast Window:



Microsoft Teams Toast Window:



If you choose to have both configured, you will receive both toast window notifications each time a contact arrives at your workstation.

Microsoft Teams Presence Synchronization

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

Sample configurations:

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

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