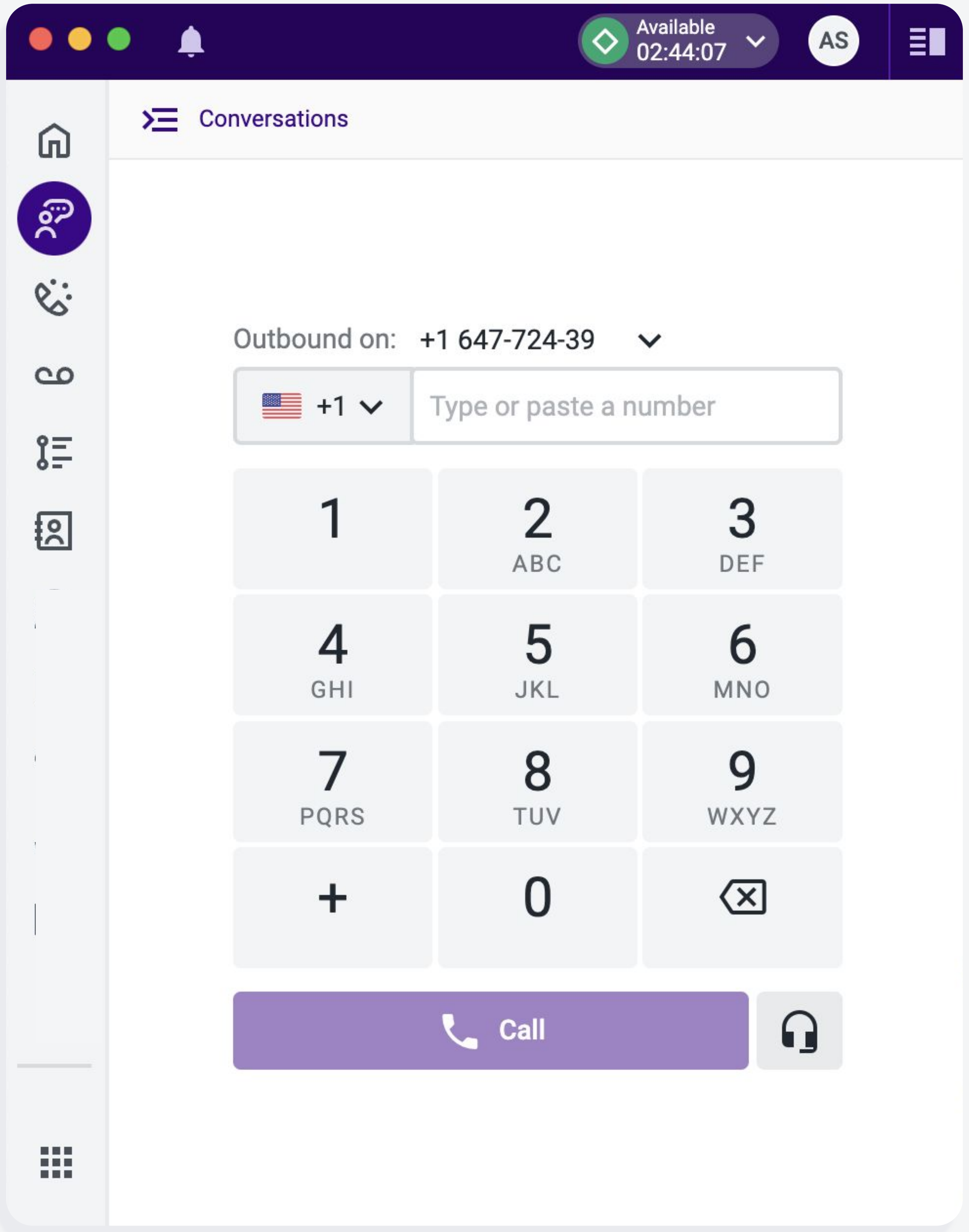
Talkdesk Agent Workspace

What is Talkdesk Agent Workspace?

Talkdesk Agent Workspace™ unifies all CX applications agents need to perform their daily tasks on a "single pane of glass", empowering them to work more efficiently and effectively.

Includes the following apps for all Talkdesk users:

- **Conversations** - Handle voice and digital customer interactions. Serves as your desktop phone.
- **Contacts** - Access, create and edit contacts.
- **Voicemails** - Manage customer voice messages.
- **Activities** - View the complete record of agent(s), ring group(s), and/or account activity.



What is Talkdesk Agent Workspace?

Talkdesk Agent Workspace™ unifies four apps which are available for all Talkdesk customers:

CONVERSATIONS

The Conversations app allows users to handle inbound and outbound, voice, and digital customer conversations, from their desktop or web browser.

With Conversations, **Agents can manage all inbound and outbound interactions using voice, SMS, Email, and live chat, all in one place.** It provides visibility on what's happening in all channels in one single thread.

Actions you can do:

- Making calls
- Receiving calls
- Setting your availability
- Call Screen Tabs

CONTACTS

The Contacts app is where you can **access all contacts lists available for your account in one single app.** In the Contacts app, you can find your business account's contacts, your colleague's contacts, and a list of your account's favorite external numbers.

Actions you can do:

- Accessing your Business Account List.
- Using Search in the Business Account List.
- Using Filters in the Business Account List.
- Viewing the Contact's Details.
- Viewing Contact Activities.
- Adding a New Contact.
- Editing the Contact's information.
- Editing the Contact's Tags.
- Deleting Contacts.

VOICEMAILS

The Voicemails app allows you to **access and handle all Voicemails in one single setting.**

Actions you can do:

- Using the Voicemails Inbox
- Accessing each Voicemail's Details
- Assigning Voicemails
- Using Filters in Searches
- Number Masking in Voicemails
- Voicemail Notifications

ACTIVITIES

The Activities app provides a **view of a list of activities per agent, as well as key details on each individual action,** based on the agent's roles and permissions.

The app displays a list of **historical data regarding calls (incoming and outgoing calls, including missed, abandoned, and transferred calls) and SMS (incoming and outgoing).**

Actions you can do:

- Viewing Activities Log Information
- Using the Filters
- Accessing the Snapshot Tab
- Editing Contact Details

KNOWLEDGE SOURCES

Find out a new way of working with Talkdesk Agent Workspace.
Talkdesk Agent Workspace unifies all CX applications and information agents need on a “single pane of glass”.
Learn how to install it and distinguish each functionality: Conversations, Voicemails, Contacts and Activities by accessing these resources.

Academy courses

COLLECTION: **Talkdesk CX Cloud Core**

- Agent Workspace Overview for Agents

  Getting Started
  Overview

- Agent Workspace Overview for Supervisors and Admins

  Agent Workspace: Overview
  Introducing Conversations
  Introducing Voicemails
  Introducing Activities
  Introducing Contacts

- Configuring Agent Workspace for Admins

  Agent Workspace: Getting Started
  Agent Workspace: Workspace Settings
  Agent Workspace: Assigning to Agents

- Configuring Agent Workspace for Supervisors

  Agent Workspace: Getting Started
  Agent Workspace: Workspace Settings

- Troubleshooting Agent Workspace

  Troubleshooting Agent Workspace

- Using Agent Workspace: Conversations, Voicemails, Activities, and Contacts

  Agent Workspace - Conversations
  Introducing Conversations
  Conversations: Before a Call
  Conversations: On a Call
  Conversations: After a Call
  Agent Workspace - Voicemails
  Introducing Voicemails
  Voicemails: Voicemail List
  Voicemails: Voicemail Panel
  Voicemails: Voicemail Filters
  Agent Workspace - Activities
  Introducing Activities
  Activities: Activity List
  Activities: Activity Types
  Activities: Activity Panel
  Activities: Activity Filters
  Agent Workspace - Contacts
  Introducing Contacts
  Contacts: Business Contacts Tab
  Contacts: Business Contact's Profile
  Contacts: Business Contacts Activity
  Contacts: Colleagues Tab

Estimated learning time: 90 minutes

Knowledge Base articles

- **Talkdesk Agent Workspace**
  - Upgrade to Talkdesk Workspace: FAQ
  - What is Talkdesk Agent Workspace?
  - Upgrading to Talkdesk Agent Workspace
  - Conversations (Voice Channel): Overview
  - Conversations (Voice Channel): Features Guide
  - Conversations (Voice Channel): Troubleshooting
  - Contacts
  - Voicemails
  - Activities

AGENT WORKSPACE
Hands-on & Step-by-step guides

During the Customer Enablement live sessions you were able to perform hands-on exercises.

The goal of this hands-on is to get you acquainted with Talkdesk Agent Workspace. By the end of this hands-on, you should be able to identify and navigate through the 4 applications that constitute the Talkdesk Agent Workspace: Contacts, Conversations, Activities, and Voicemails. Among exploring other features, you will be able to do a mock client call, create and search for contacts, and leave a voicemail.

In case you want to practice or repeat your hands-on, you can review your session recording or you can find in the following pages step-by-step guides for each Talkdesk Agent Workspace app: Conversations, Contacts, Voicemails and Activities.

To easily find the solution for your hands-on exercise about Agent Workspace, consult the following pages:

- Operate standard phone functions while using Conversations
  - Create a Studio flow routing directly to your agent or to a ring group and assign a number (page 51)[1.]
    - Mock a client calling your assigned phone number, and answer the inbound call as an agent (page 24).
  - Blind transfer a call to an agent, ring group, or external number (page 29).
  - Hold/Mute Functionality (page 28).
  - Update dispositions and call notes (page 27).
  - Initiate a consultation with another agent, ring group, or external number (page 30).
    - During the consultation, switch between the caller and the receiving agent.
    - Create a conference with the caller and receiving agent.
    - Fully transfer the call to the receiving agent.

- Change my status to a predefined Available/Away/Busy State
  - In Conversations, select the 'status bar' in the upper right of Workspace and change to a green, yellow, or red state (page 21).

- Update contact data for new/unknown contacts
  - Create a contact record for your "customer" in Talkdesk (page 32)/ (page 35)
    - Initiate an outbound call to your "customer" from their Contact page

- Be presented with contact data for known contacts
  - Quickly navigate to the contact's page in Talkdesk while on an active call (page 32)

- Find the Interaction ID while on a live call (page 24).
- Find the Interaction ID for any completed calls and listen to the call recordings (page 38).

- Initiate a call to your Studio flow and leave a voicemail (page 42).
  - As an agent, access the voicemail to listen to the message, assign the voicemail to yourself, call the customer back, and resolve the voicemail.

- Create an external favorite within Admin > Preferences (page 36).
  - Initiate an outbound call to your saved favorite (page 35).

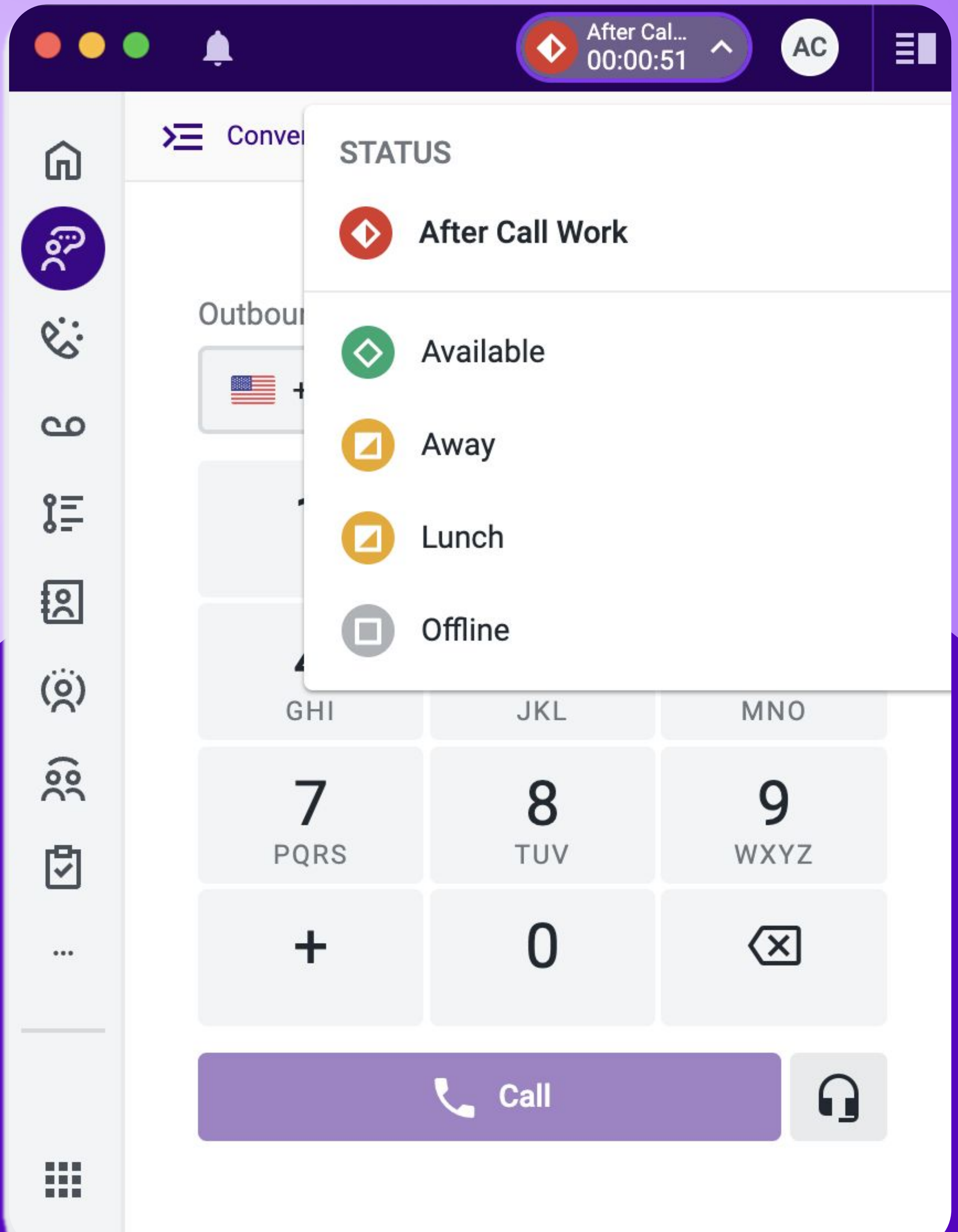
1. *The example presented routes the call to an audio message, but you can route it directly to an Assignment & Dial component.*

:talkdesk®

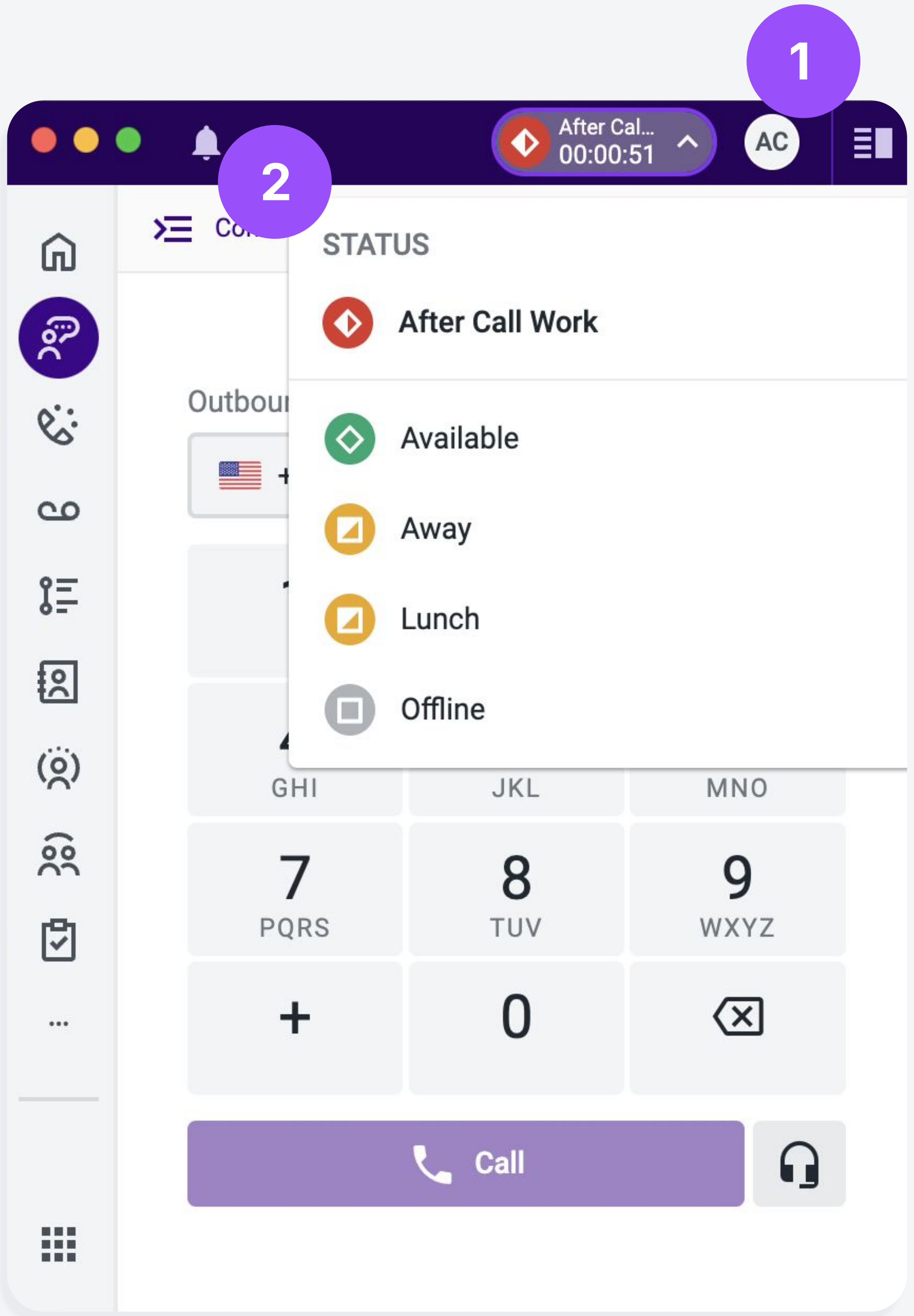
CONVERSATIONS | Step-by-step guide

The following pages show you a step-by-step guide to handle interactions in Conversations with the following actions:

- **Agent Status**
  - Agent Status Types
- **Calls**
  - Making Outbound Phone Calls
  - Receiving Inbound Phone Calls
  - Receiving a Transferred Call
  - Number Masking
  - Disposition Codes and Notes
  - Mute / Hold Functionality
  - Call Transfers - Blind
  - Call Transfers - Consult (Warm)
- **Contacts**
  - Adding Guests
  - New Contact Selection
  - Existing Contact Selection



Agent Status



Status is how you control whether or not you can receive phone calls.
Make sure you are set to **'Available'** when you are ready to receive phone calls.

- You can change your status at any time from the toolbar, by clicking on the symbol below your initials of either the CX Cloud app or Talkdesk web page **[1]**. Simply click on the list of statuses defined by your company's leaders **[2]**.
- Talkdesk will also change your status automatically when you are on a call or handling Dispositions in Talkdesk.

Agent Status | Types

GREEN: The agent is signed into Talkdesk and is available to take calls. There can only be one green status in the environment, and the **default value is 'Available'.**

RED: The agent is signed into Talkdesk but is busy performing other tasks. If no other agents are available, any new call will wait in queue until an agent in red status becomes available.

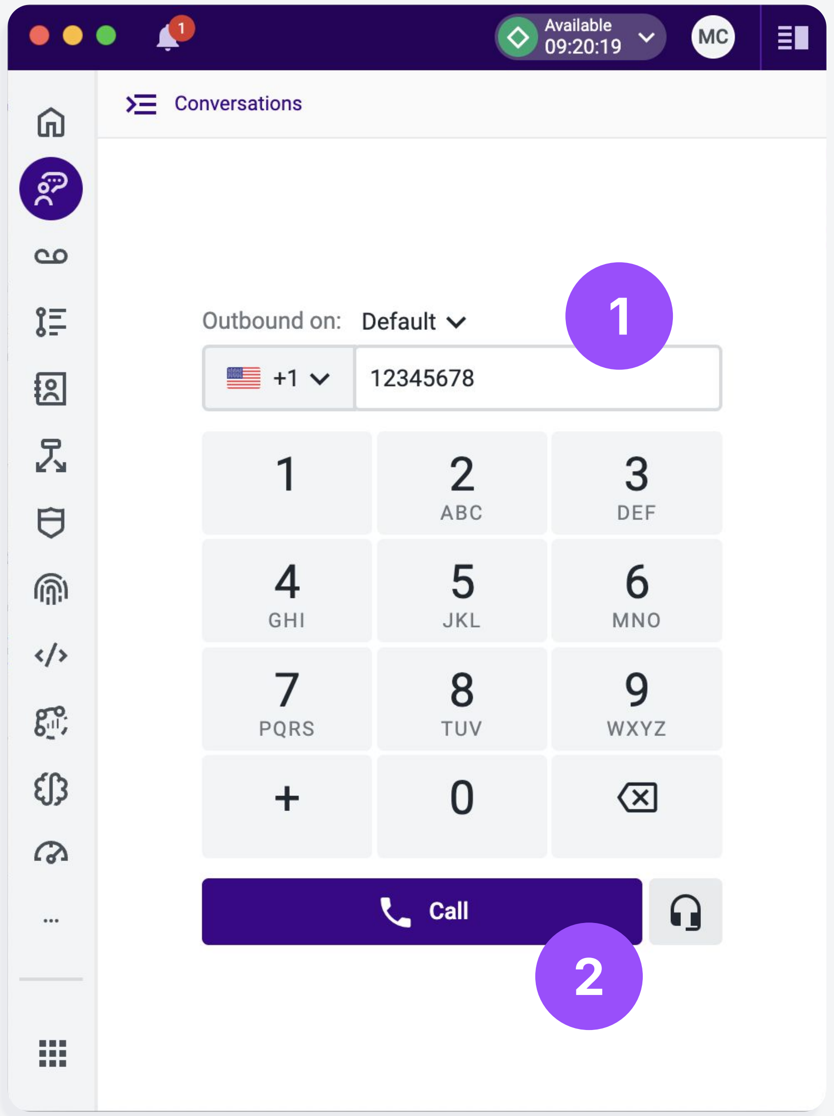
Two default red statuses:

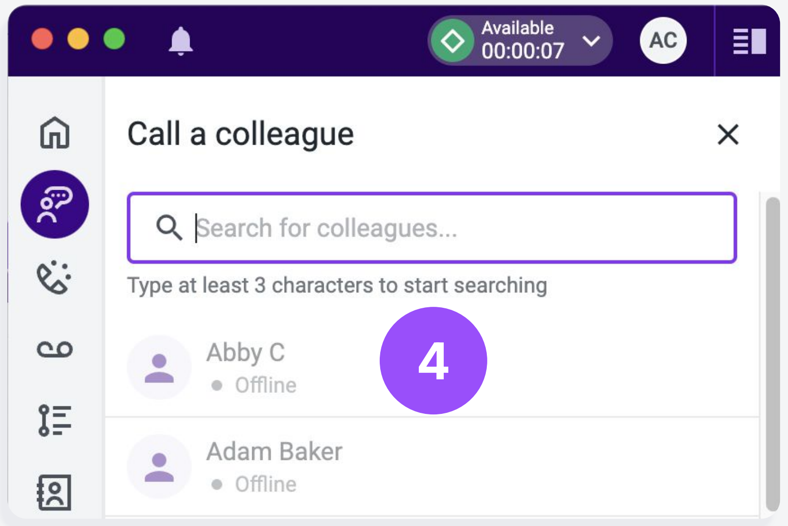
- **On a Call:** The agent is signed into Talkdesk and is on a call. This status is automatically changed when agents receive/make a call, and they are unable to receive calls.
- **After Call Work:** When a call ends, the agent's status can be configured to automatically change to "After Call Work" for a fixed period of time. The agent cannot receive calls.

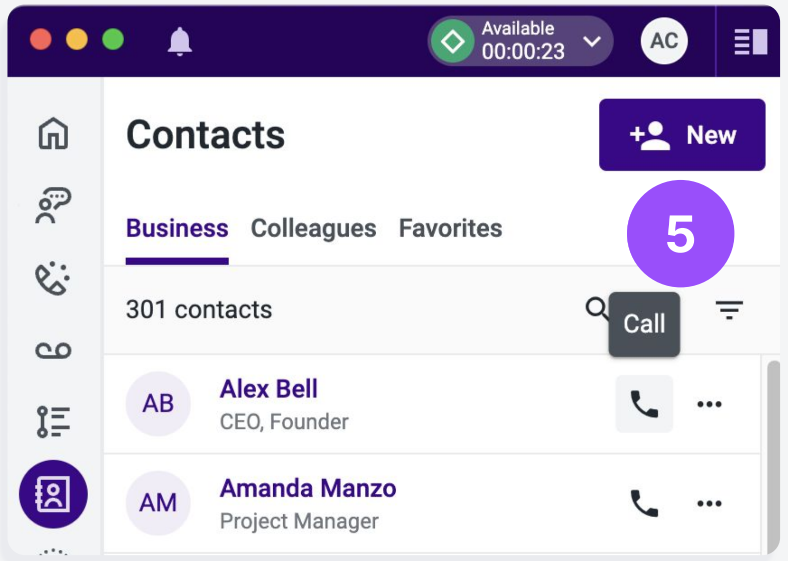
YELLOW: The agent is signed into Talkdesk but may be **away** from the computer and not eligible to take calls. It will still allow agents to receive call transfers though, should they wish to accept these.

GRAY: This status indicates that the agent is not signed into Talkdesk and is unable to receive calls.
There can only be one gray status in the environment, and the default value is **'Offline'.**

Making Outbound Phone Calls







Type in or copy / paste a phone number into the dialer pad **[1]**.

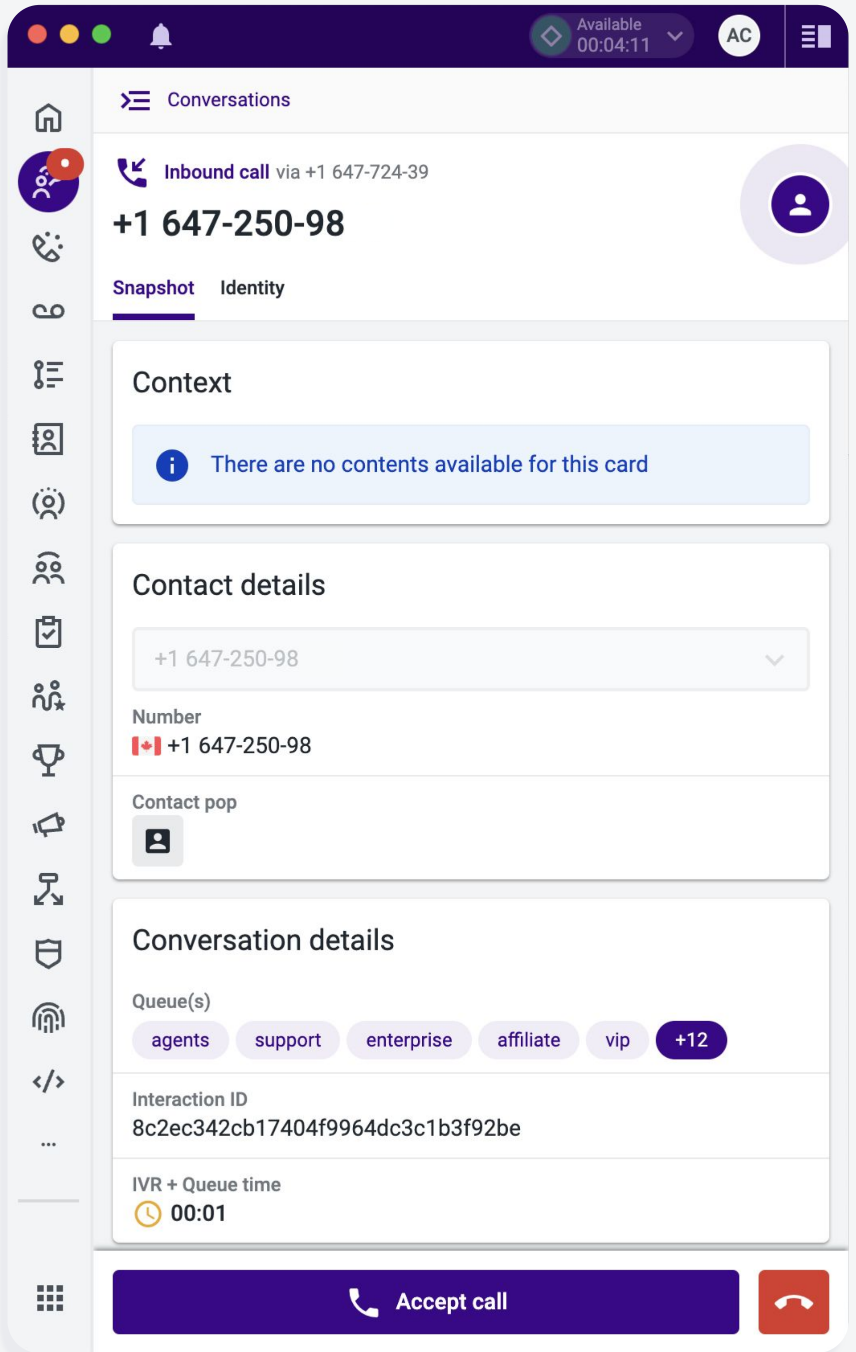
Once you have entered the number, click the **Call** button **[2]** to initiate a call.

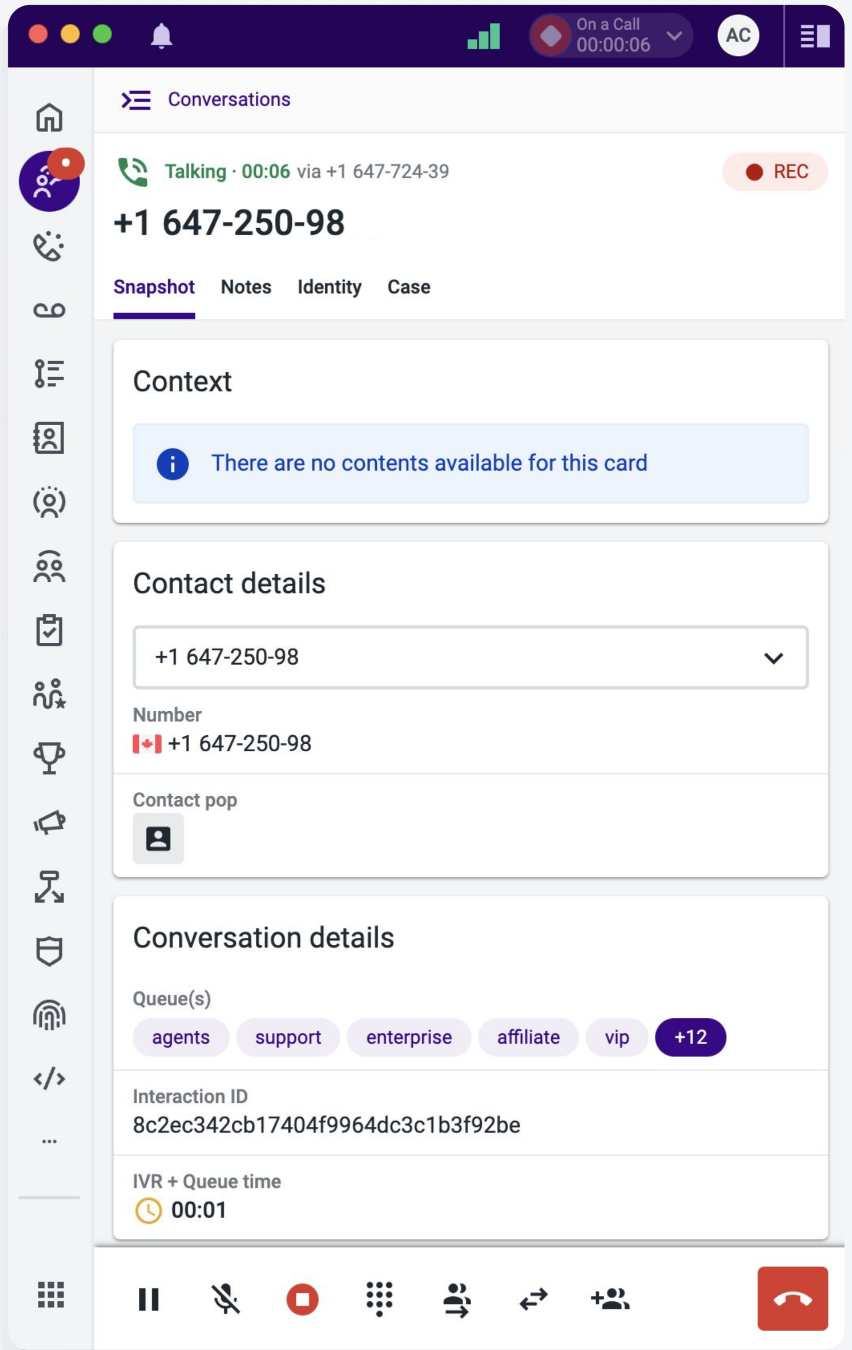
You can initiate an internal call to a colleague by clicking the headset button **[3]** next to the **Call** button.

- This will bring up a list of all agents and their current status that you can browse through or begin typing the name of the target agent.
- Simply click a name **[4]** to initiate an internal call.
- Note, you are only able to call agents who are in a **GREEN** or **YELLOW** status.

Contacts can also be dialed by navigating to the **Contacts** app and selecting the phone icon **[5]** next to their name.

Receiving Inbound Phone Calls





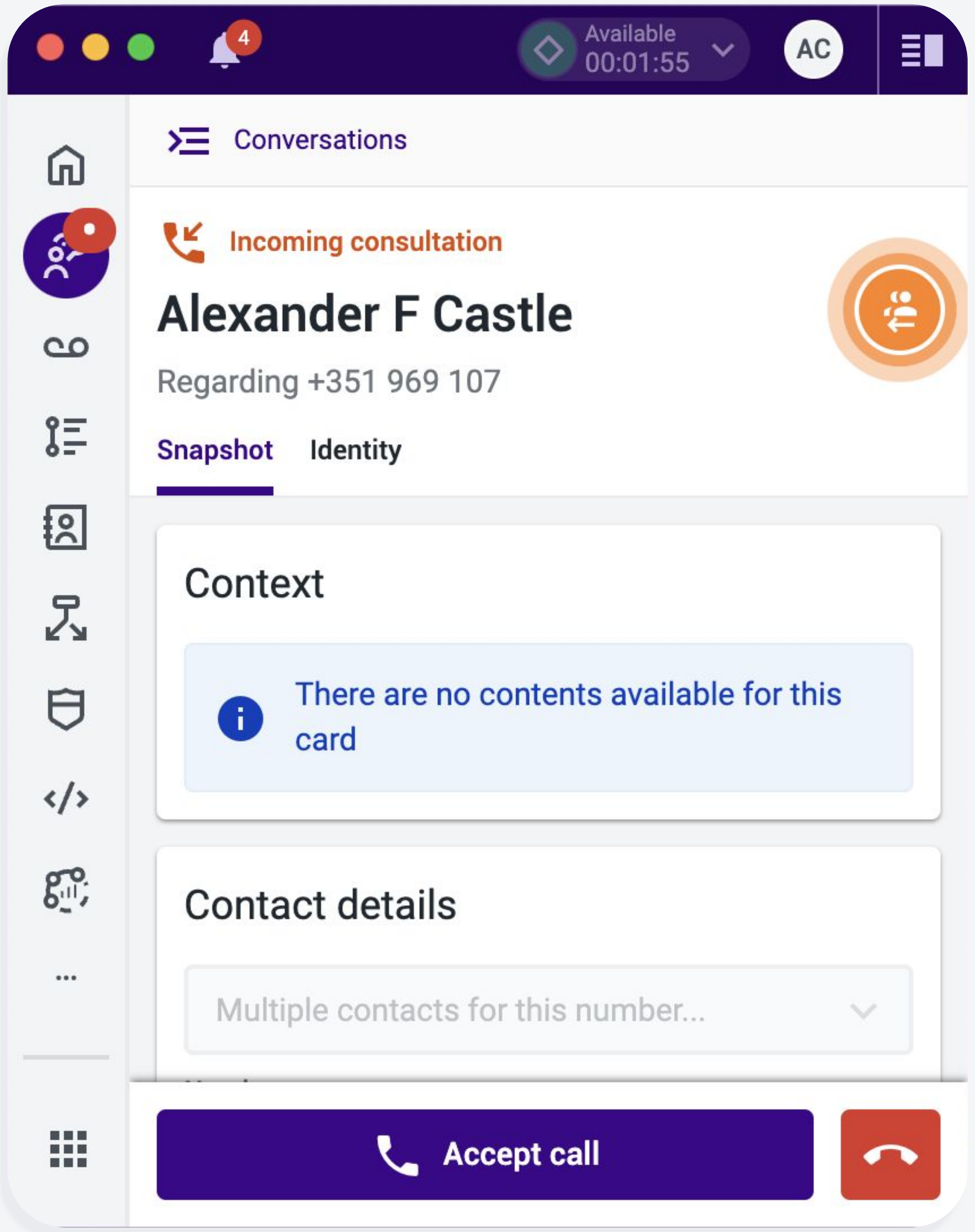
When receiving an inbound call:

- **Web browser** - you will see a toast notification on your Talkdesk tab.
- **CX Cloud** - the application will popup even if minimized.

Whether you receive an inbound call or you are making an outbound call through **Conversations,** you will see all the information Talkdesk was able to capture for that contact.

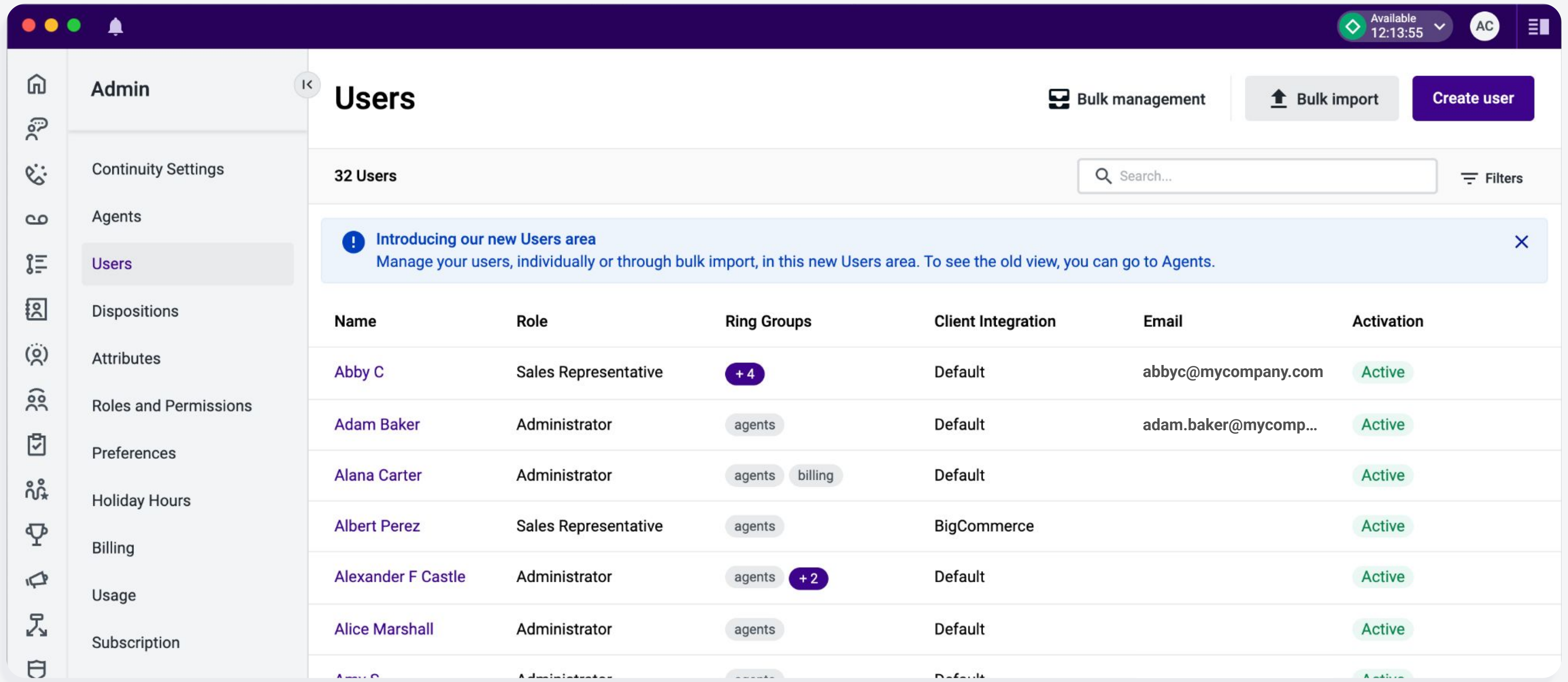
Queues and other context data, such as the Interaction ID, will be displayed in **Conversations** prior to accepting the call, and while on the call.

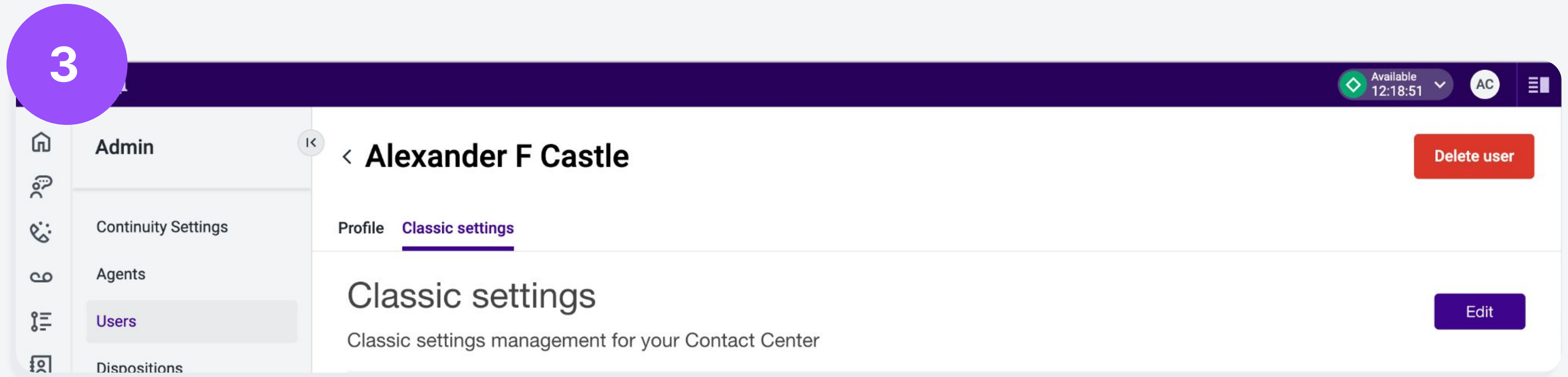
Receiving a Transferred Call

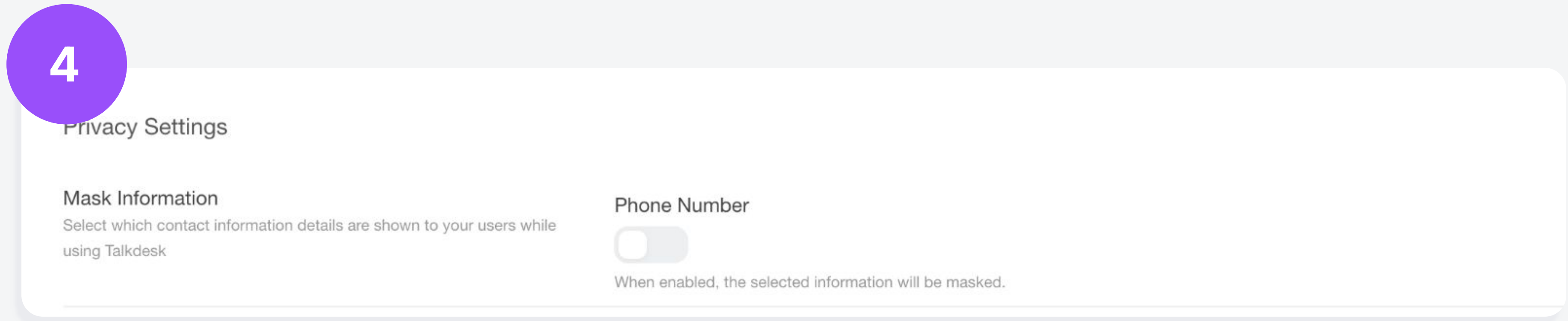


When receiving a transferred call, **Conversations** displays who the transfer originated from.

Number Masking





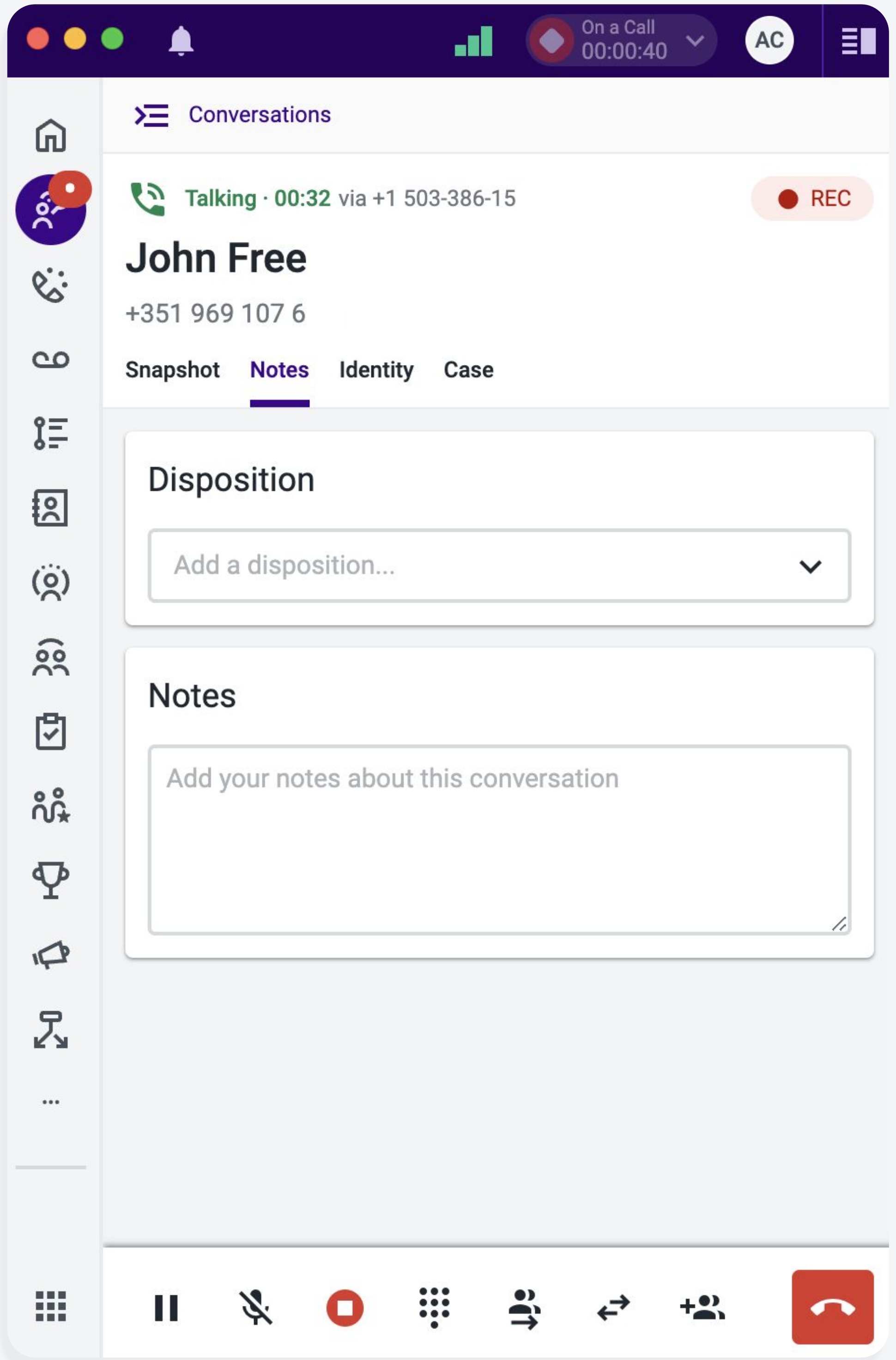


To ensure the security of customer interactions, **Admins** can decide whether agents should have access to the contact persons' phone numbers or if they should be masked.

- Go to the **Users** tab of the **Admin app [1]**.
- Select the agent you wish to configure the number masking **[2]**.
- Go to the **Classic Settings** tab **[3]**.
- Scroll down to **Privacy Settings [4]** and toggle the button if you wish to enable the **Mask information** setting.

Note that this feature is only available for **Conversations** (voice) and **Voicemails**.

Disposition Codes and Notes

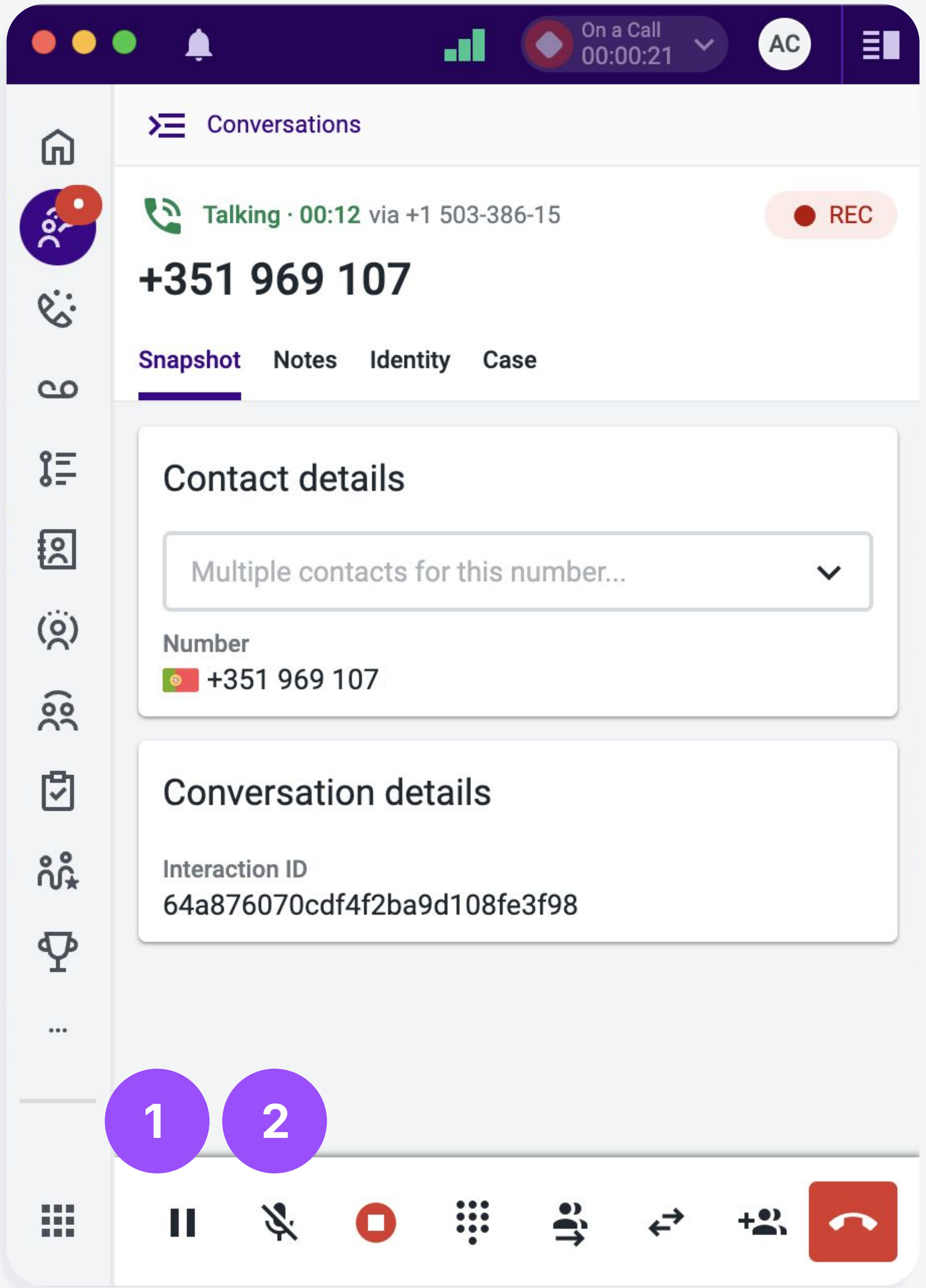


You can take notes while on a call by going to the **Notes** tab.

- It will pop open the **Disposition** **[1]** and **Notes** **[2]** that will be saved upon ending the call.
- If you choose not to use notes or dispositions while on call, you will be presented with the same screen once a call ends if your agent profile has been enabled to do so.
- Notes are not mandatory.

Dispositions allow for a quick overview of the call and also can be used to trigger automations downstream or used for reporting.

Mute / Hold Functionality

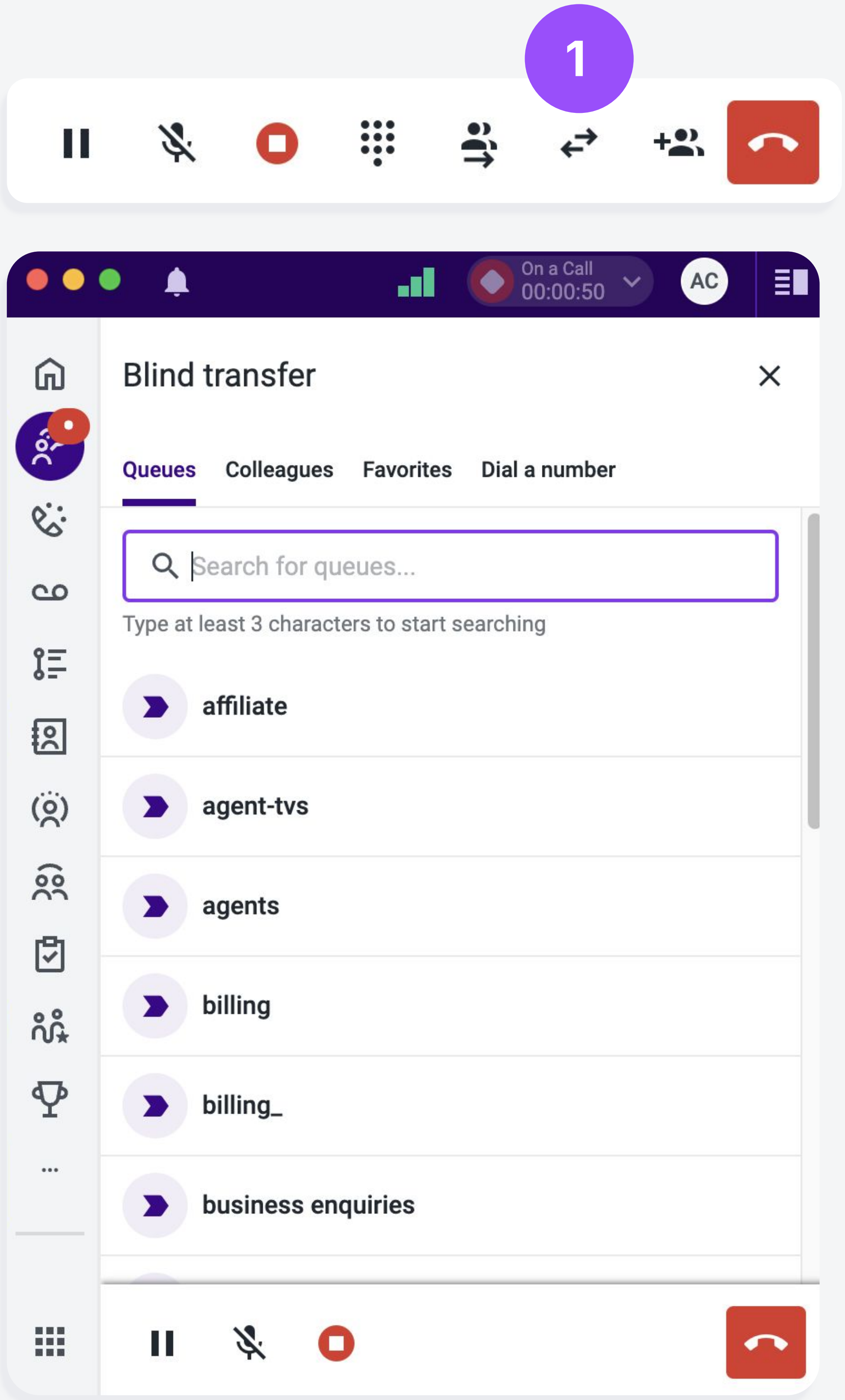


To place a call on hold simply click the **Hold** button **[1]**. When a call is on hold, the caller cannot hear you and you cannot hear the caller.

- Note when you place a caller on hold, you will not be able to initiate a conference or warm transfer.
- You will be able to initiate a blind transfer if needed.

To mute a caller click the **Mute** button **[2]**. When a call is on mute, you can still hear your caller but the caller or other agents on the call cannot hear you

Call Transfers - Blind



To immediately send a caller to another queue, colleague, favorite contact or external party, use the **Blind Transfer button [1]** to transfer the call.

Queues: Click on the queue to transfer the call. A blind transfer will be placed into queue if there are no available agents in the target Queue.

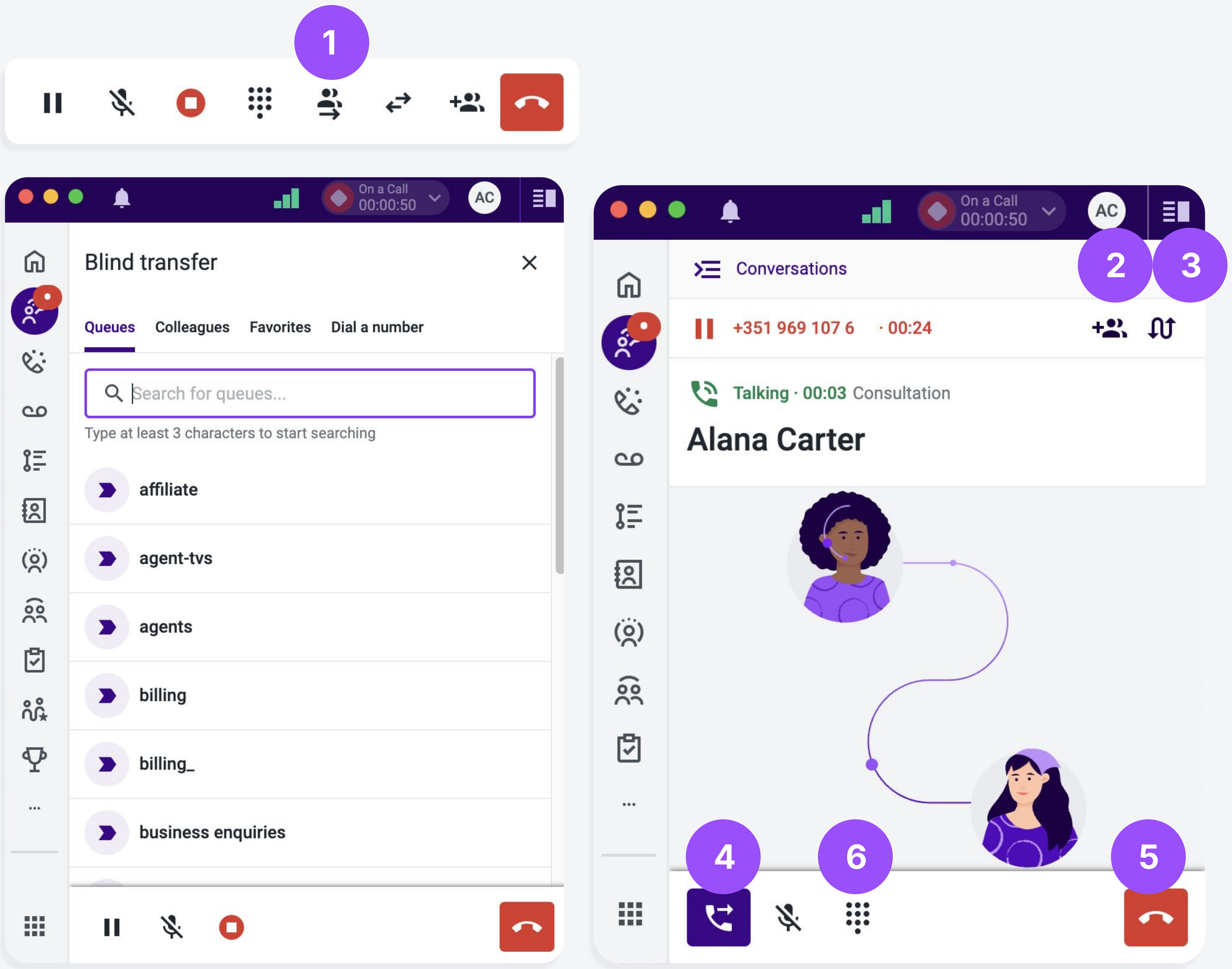
Colleagues: Click on the name of the agent you want to transfer the call. You will be able to see all agent statuses prior to transferring the call.

Note, only agents who are in a **GREEN** or **YELLOW** status will be able to receive a transfer.

Favorites: Click on the contact you want to transfer the call.

Dial a number: Type any phone number and press enter or the Call button to transfer the call.

Call Transfers - Consult (Warm)



If you choose to warm transfer, you can talk to the receiving agent/external contact about the caller's issue, give any background information that might be helpful and prepare him or her for the interaction.

To initiate a warm transfer, press the **Consult** button **[1]**.

- You can also consult other queues, colleagues, favorite or external numbers - see previous page for details on each category

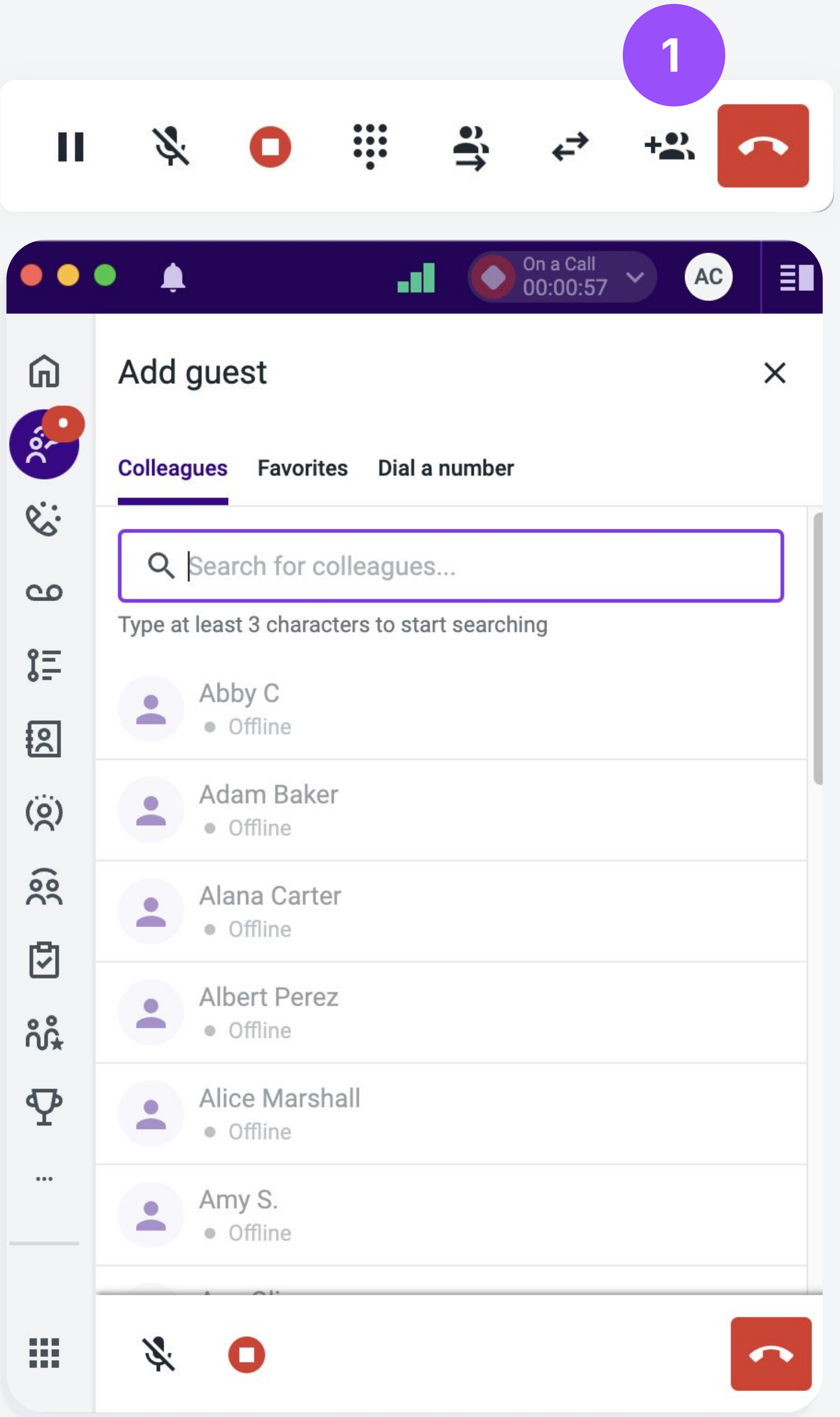
You can add the contact person to the consultation **[2]**, or switch between callers **[3]**.

When you have spoken with the receiving agent and you are ready to complete the transfer, select the **Transfer** button **[4].**

The **End Consultation** button **[5]** allows you to cancel the transfer and go back to the original call with the customer.

Use the **Keypad [6]** to enter any required extension or IVR option if needed.

Adding Guests



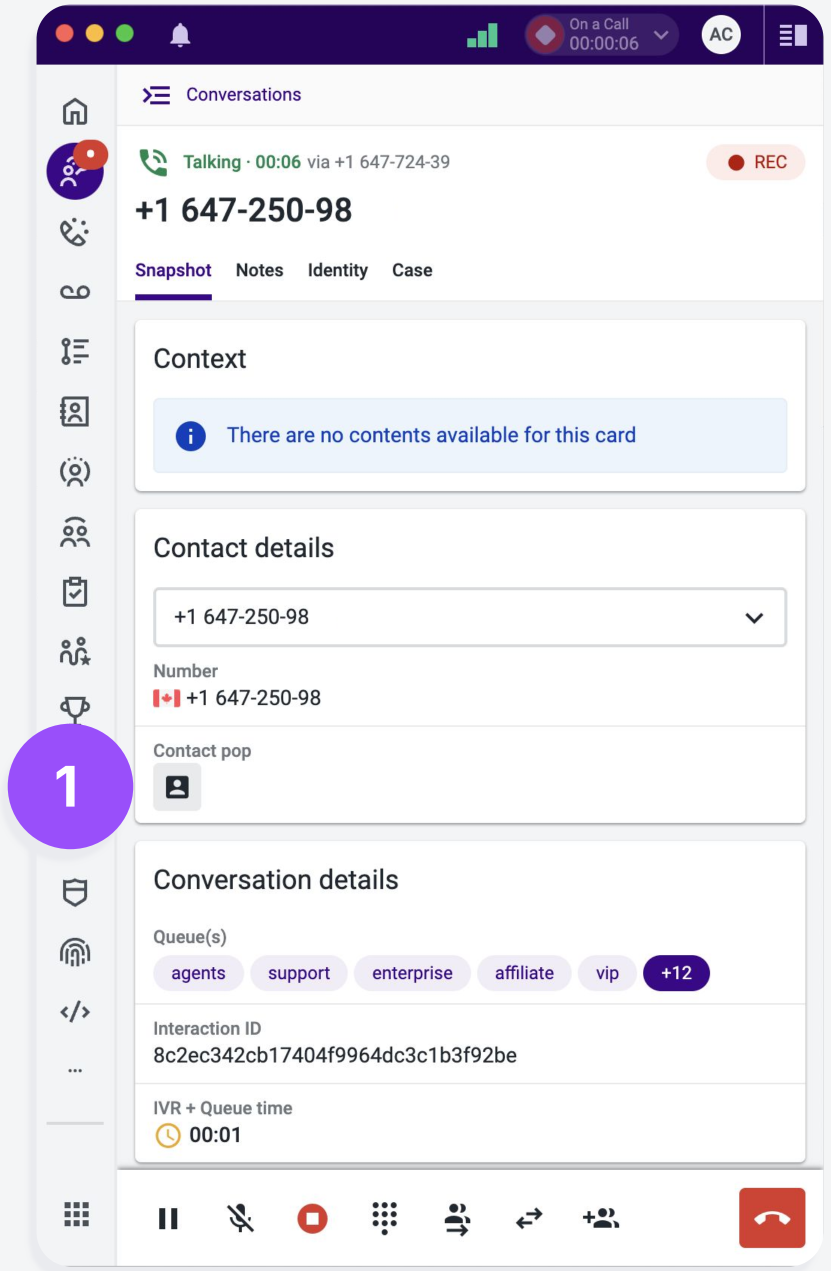
If you want to conference in one or more guests to the call, click the **Add guest** button **[1]**.

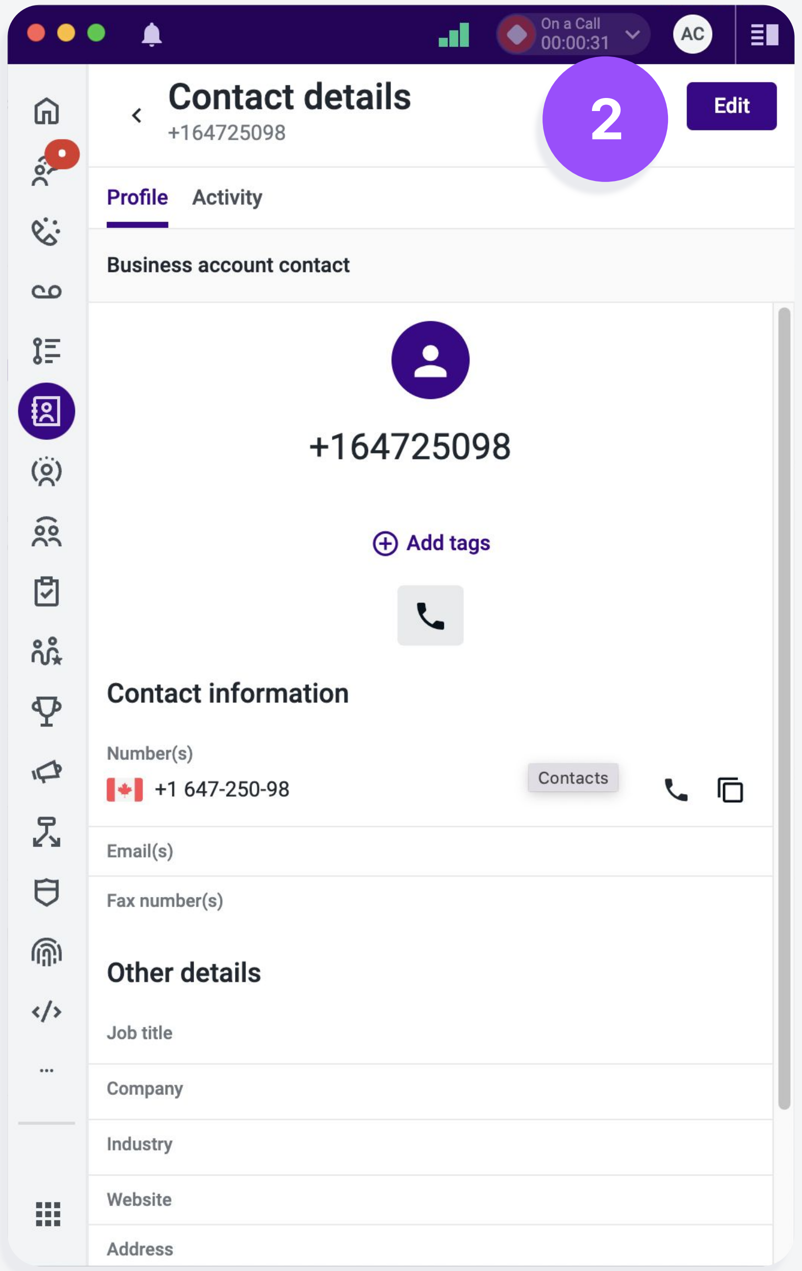
You can add in other agents, favorite contacts or external numbers to a conference.

The limit of guests on a call is 10 participants. The original customer's name is always displayed at the top of Conversations.

- You will see the count of additional participants next to the contact's name.
- The agent name or external number that have joined the conference will be displayed under the original customer's name
- You can remove any guest (except the original customer) by simply clicking the "x" button next to the number/name.

New Contact Selection

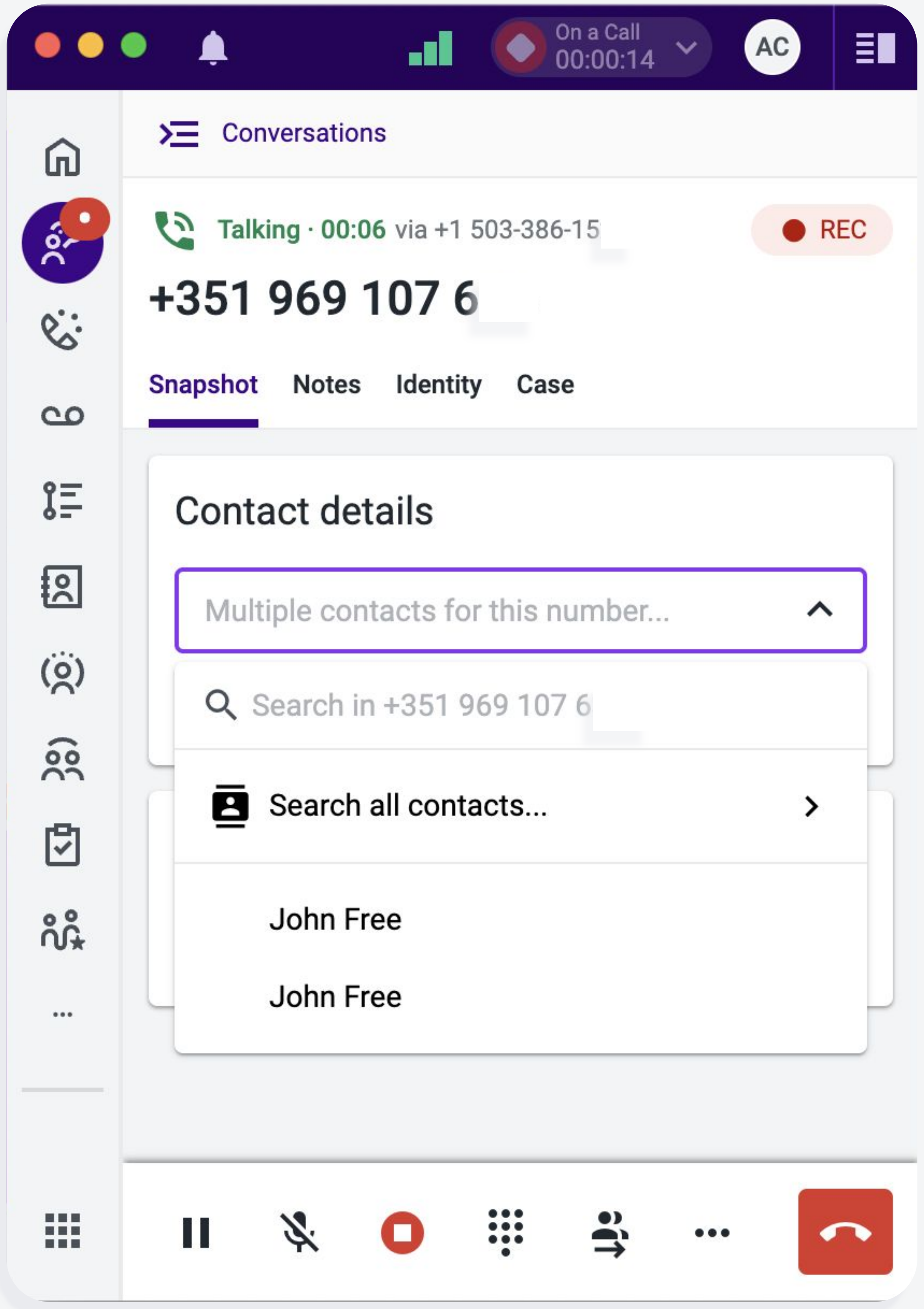




While on the call with the new customer you can click on the **Contact** pop icon **[1] which opens the Contacts app where you can edit the information [2] and save the new contact.**

- For any agents using a CRM, it is recommended to create any new contacts in the CRM.
  - A contact sync will run periodically between CRM and Talkdesk to push the new contact's information into Talkdesk - this information can then be displayed the next time the customer calls into the business.
  - Contacts that are created in Talkdesk do not get pushed into CRM.

Existing Contact Selection



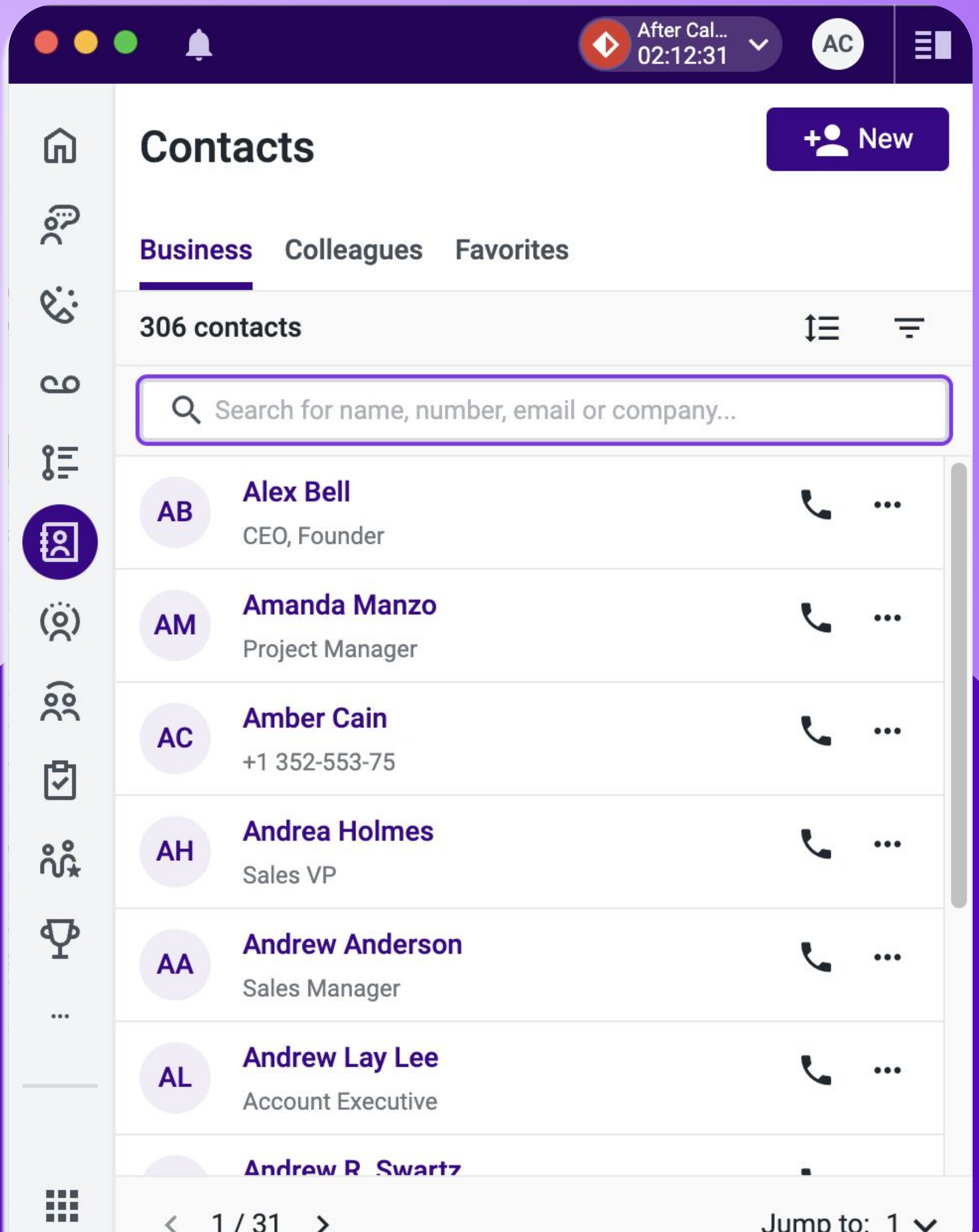
When multiple contacts share the same phone number, you will see **Multiple contacts exist for this number** dropdown **[1]** on the **Contact details**.

- Select the correct contact and your call will be logged to that contact
- If the contact exists in CRM, the CRM logo will be available in the 'Contact pop' section
  - Agents can click the CRM logo to open the contact in CRM

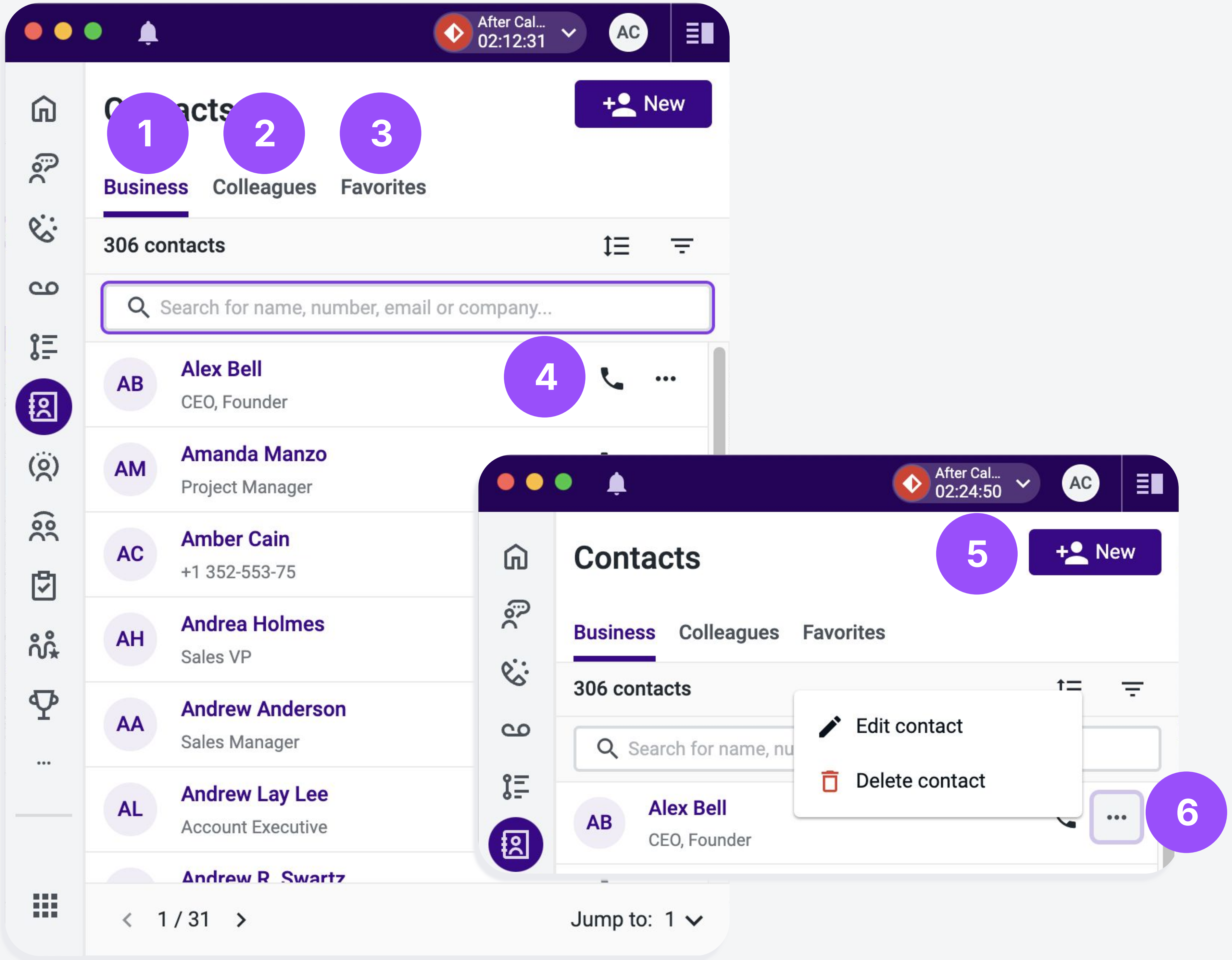
CONTACTS | Step-by-step guide

The following pages show you a step-by-step guide on how to use Contacts with the following actions:

- Managing Contacts
- Creating an External Favorite Contact



Managing Contacts



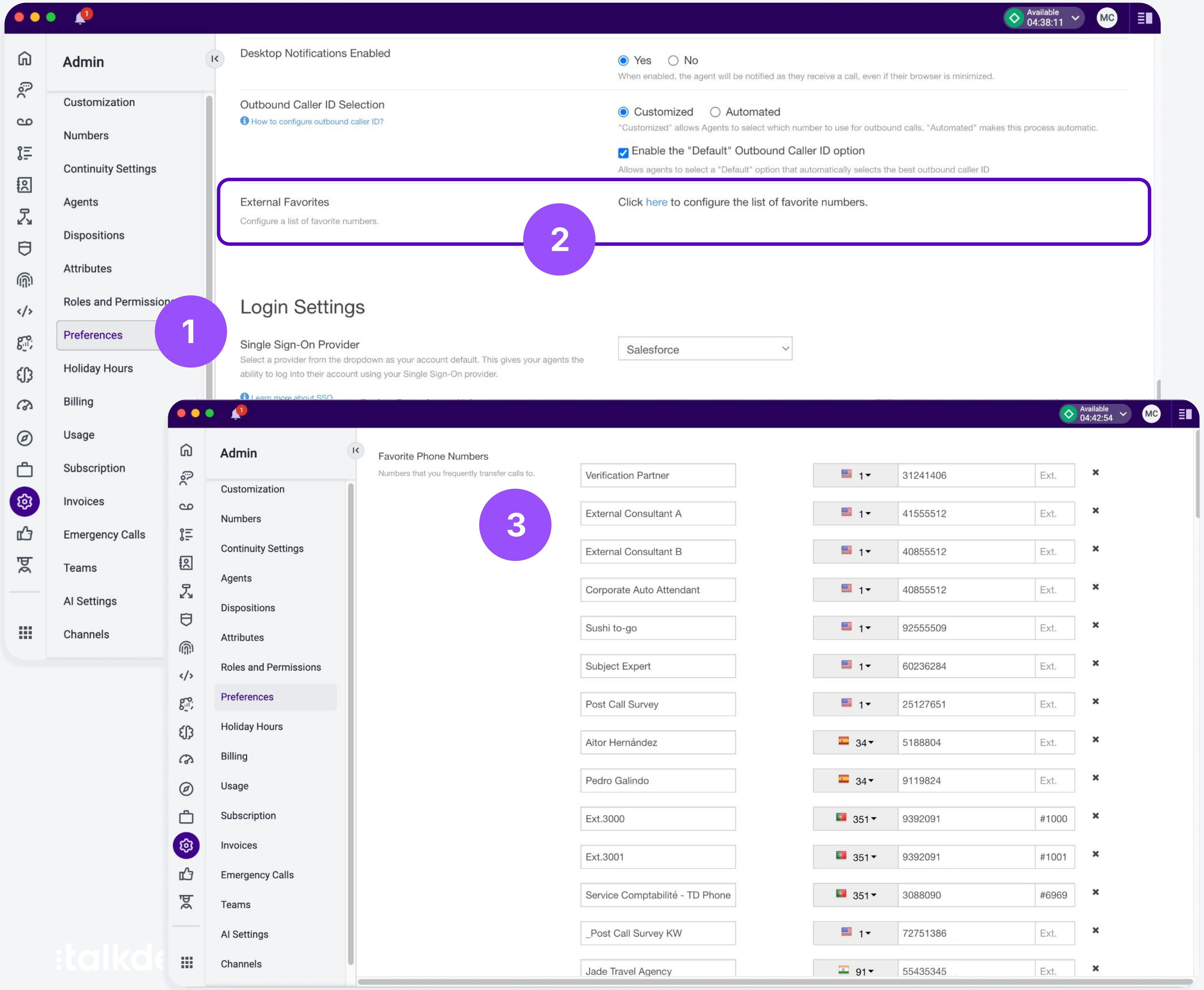
The **Contacts** app shows you 3 tabs of contacts:

- **Business [1]**
- **Colleagues [2]**
- **Favorites [3]**

You can initiate an outbound call from your contacts' list **[4]**.

You can also add new contacts **[5]**, or edit and delete existing ones at any time **[6]**.

Creating an External Favorite



Talkdesk allows agents to initiate and transfer calls to favorite external phone numbers with a few clicks.

To do it, you need to compile a list of External Favorite Phone Numbers in the **Preferences** tab of the **Admin** app **[1]**.

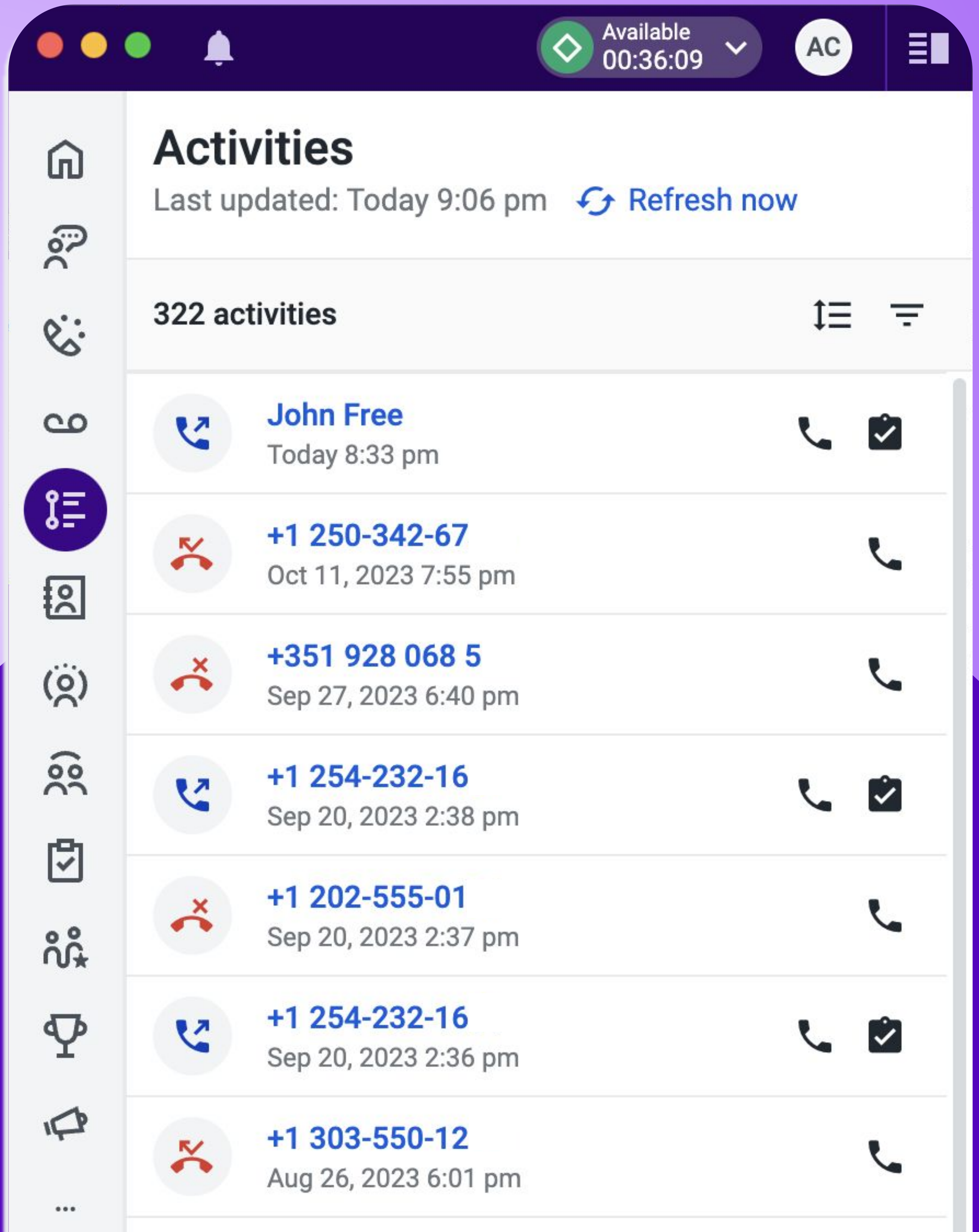
Scroll down to the **Agent Workflow** setting and click the link next to **External Favorite [2].**

You're redirected to a page with all the **Favorite Phone Numbers [3].**

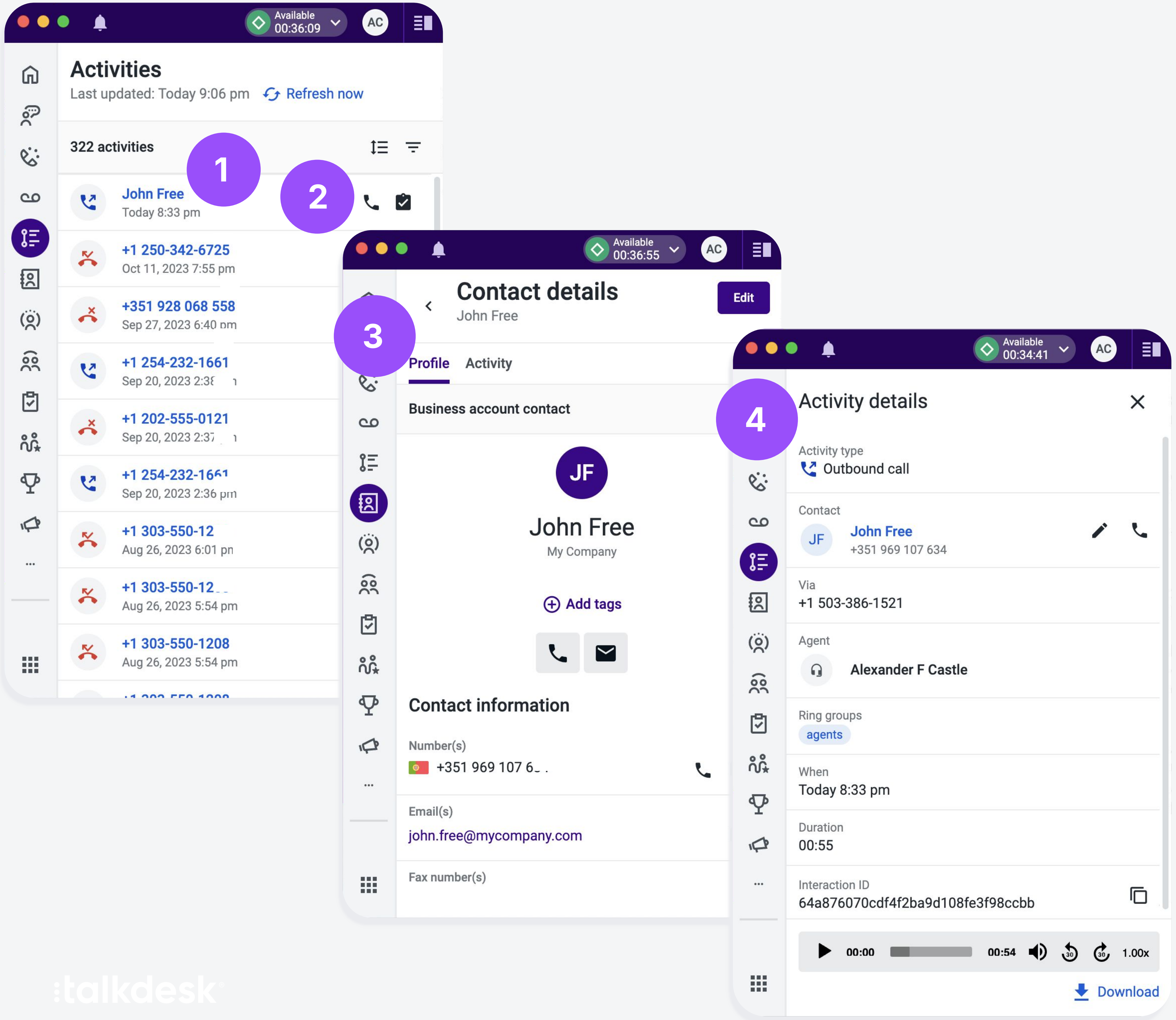
ACTIVITIES | Step-by-step guide

The following pages show you a step-by-step guide to access your interactions' historical data, with the following actions:

- [Accessing Activities]
- [Filtering Activities]



Accessing Activities



The **Activities** app shows personal call history or call history for your applicable queues, depending on the permissions you give to agents.

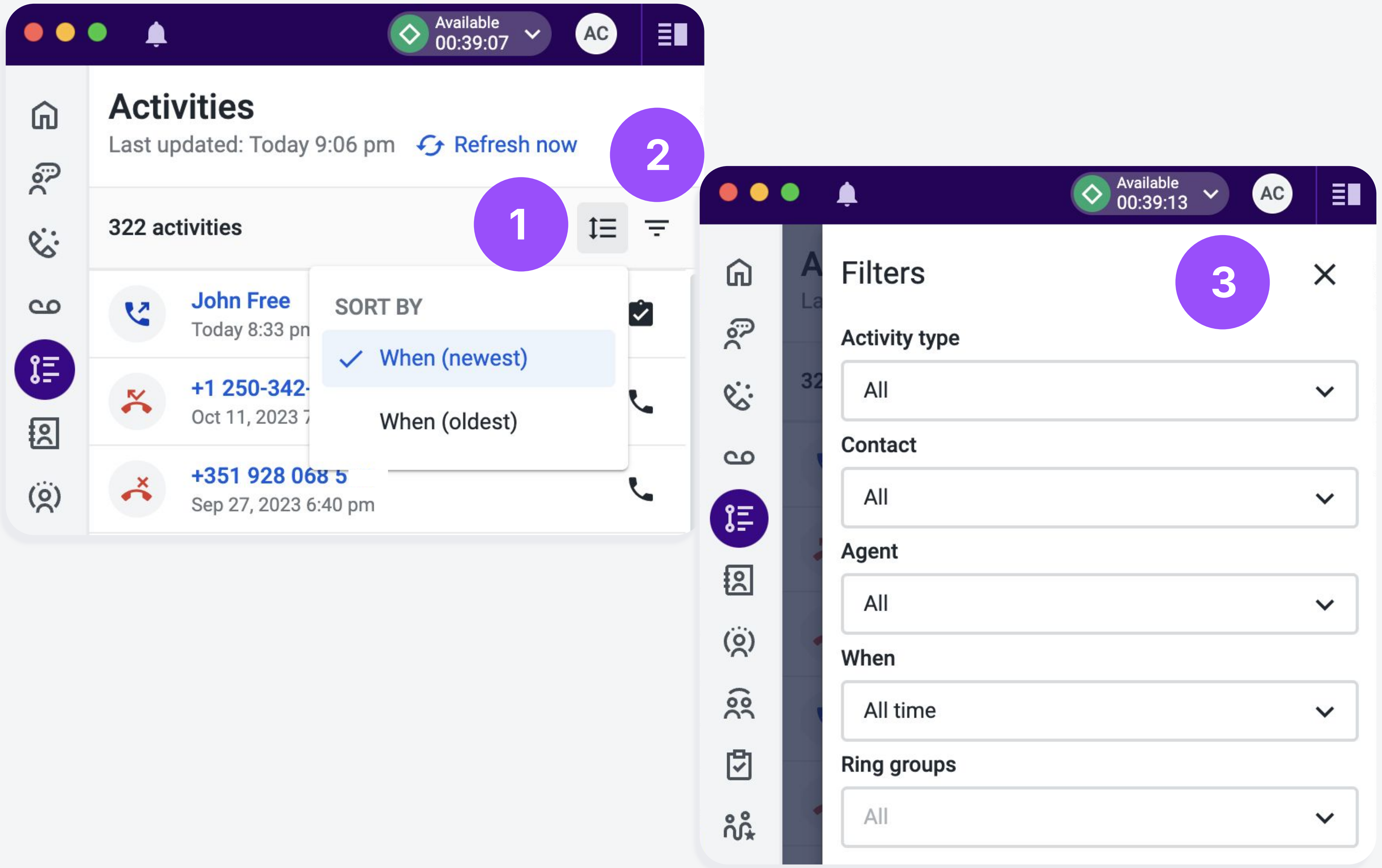
- Here, you can see at what time you received or made a call to a specific contact **[1]**.
- You can initiate a call to a contact by clicking on the phone icon for the record you wish to call **[2]**.

By clicking on the name of a contact within Activities, you will be brought to the contacts profile page where you can see information about the contact as well as their personal call history **[3]**.

Clicking on the activity itself (ie. in the white space of the record) you will see a drill down of details for the selected call **[4]**, such as the Interaction ID or the call recording.

IMPORTANT: If you experienced any issue, whether call quality or customer related, that you want to raise to your supervisor, copy and send the Interaction ID listed on the applicable activity.

Filtering Activities

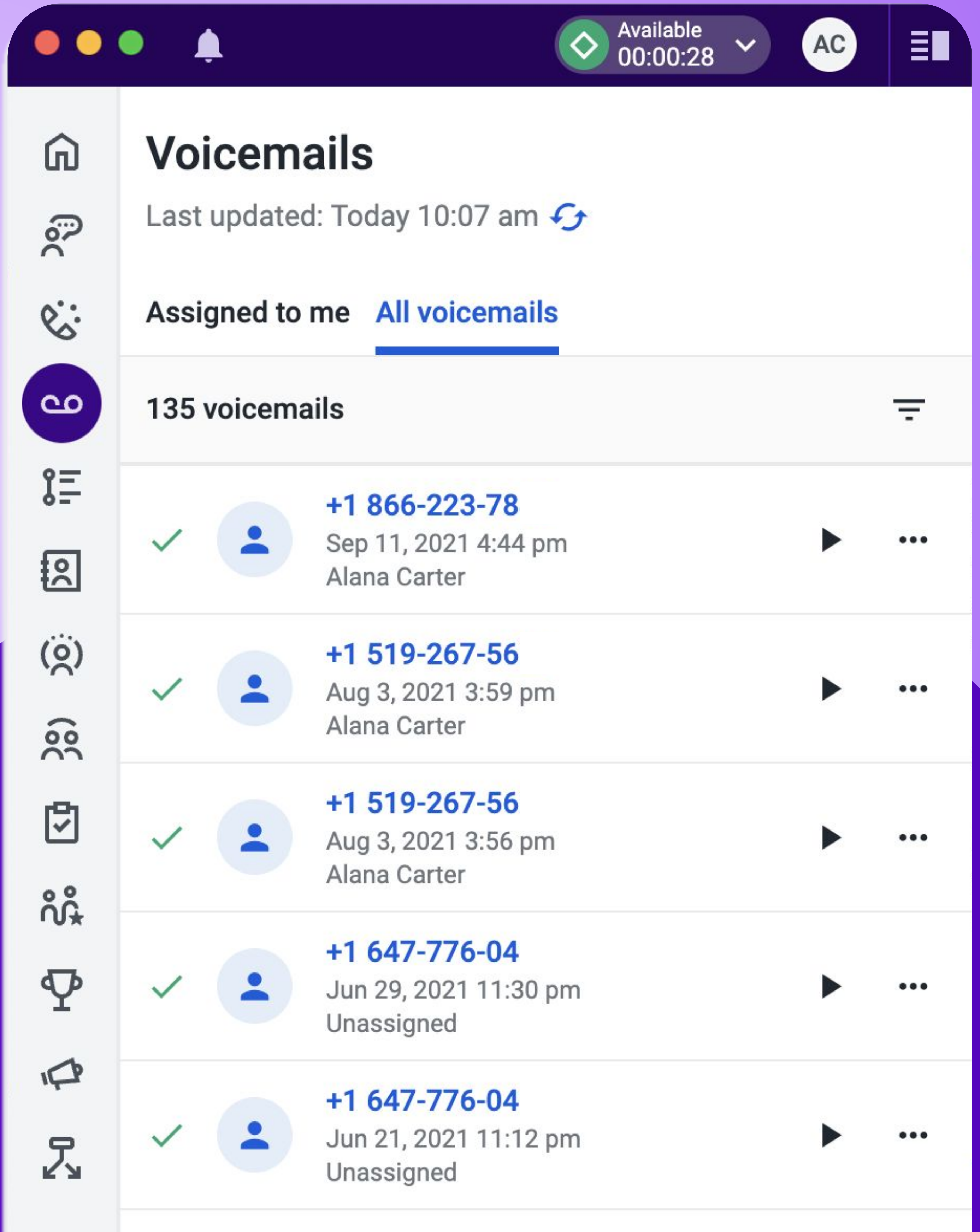


You are able to sort activities by newest / oldest **[1]**, as well as filter on different criteria **[2][3]**.

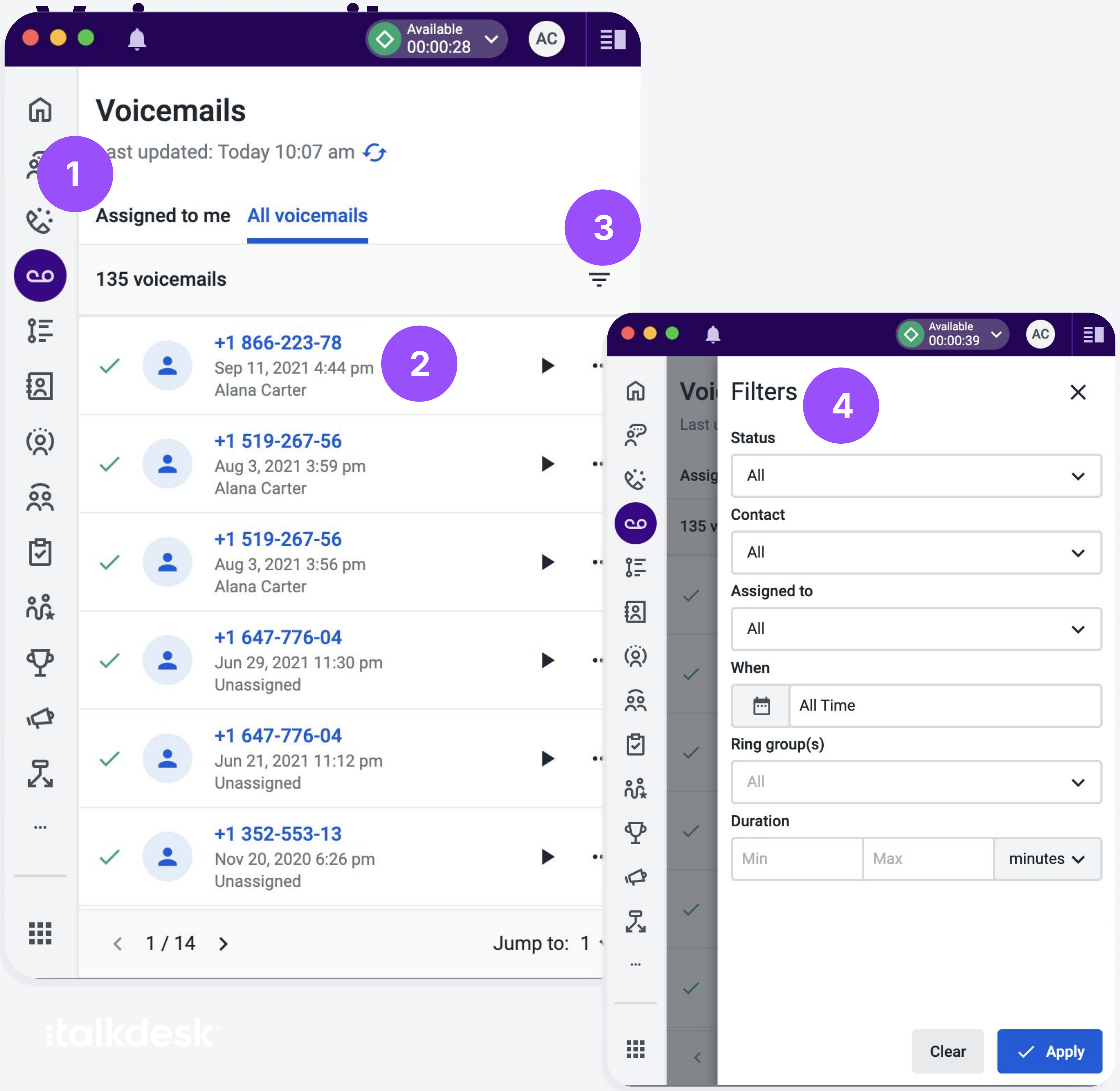
VOICEMAILS | Step-by-step guide

The following pages show you a step-by-step guide to to use the Voicemails app, with the following actions:

- [Accessing Voicemails]
- [Handling Voicemails]
- [Opening the contacts' profile page]



Accessing

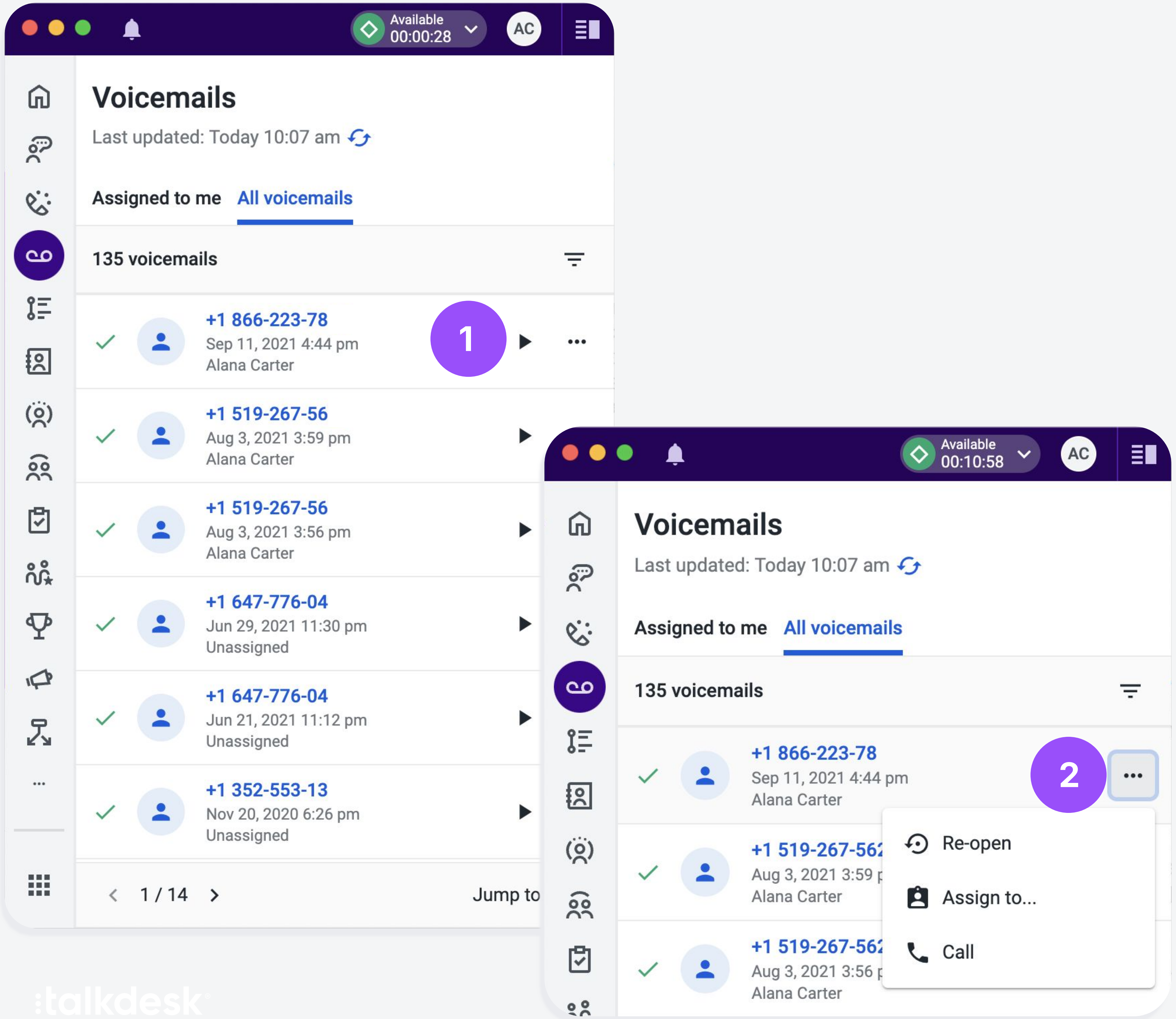


The **Voicemails** app shows any voicemails that have been left for your applicable queue(s) as well as any voicemails that have been assigned to you **[1]**.

Here, you can see at what time your agent or the queue received a voicemail from a specific contact **[2].**

You can filter your view based on different criteria **[3] [4]**.

Handling Voicemails

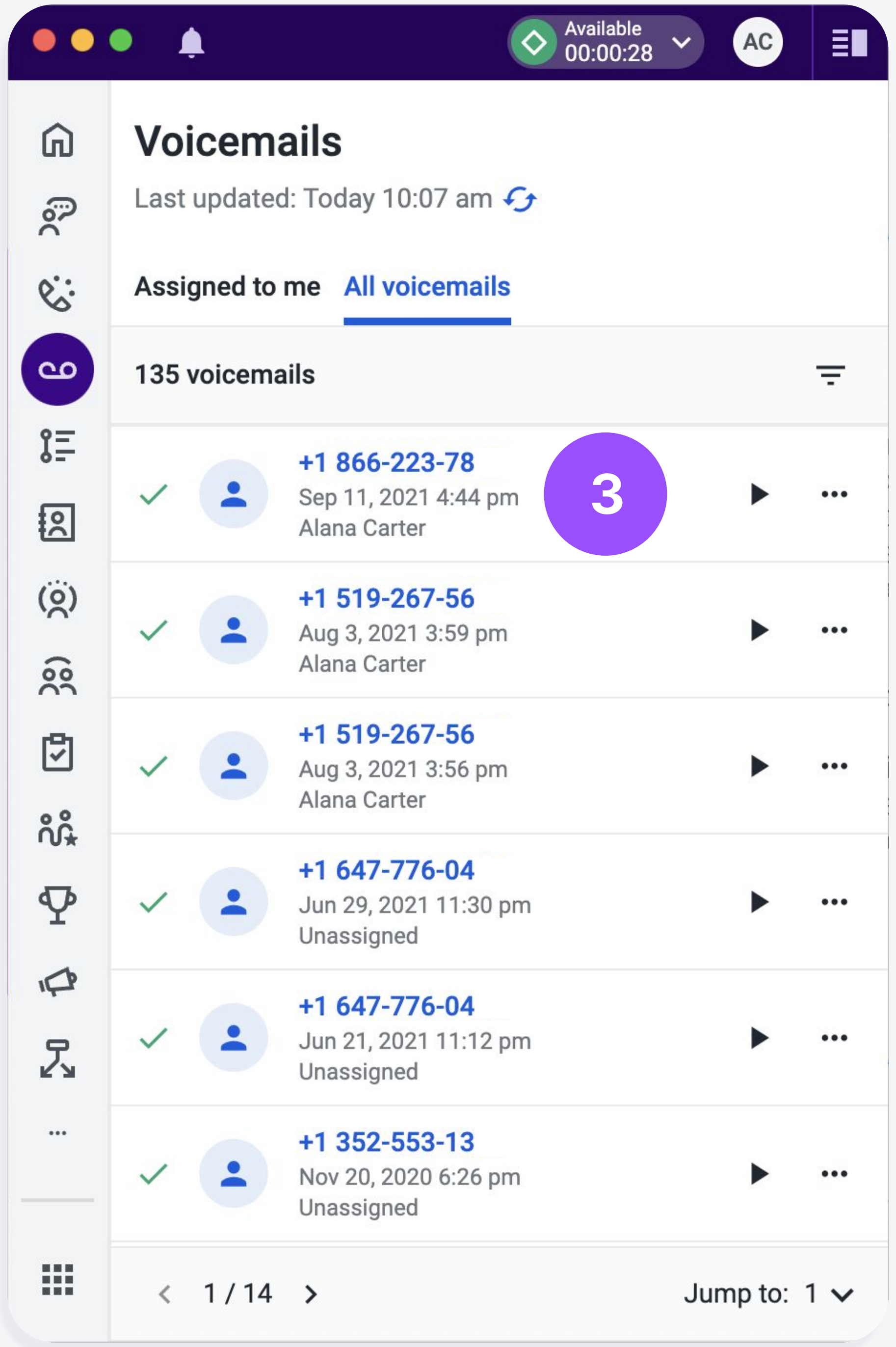


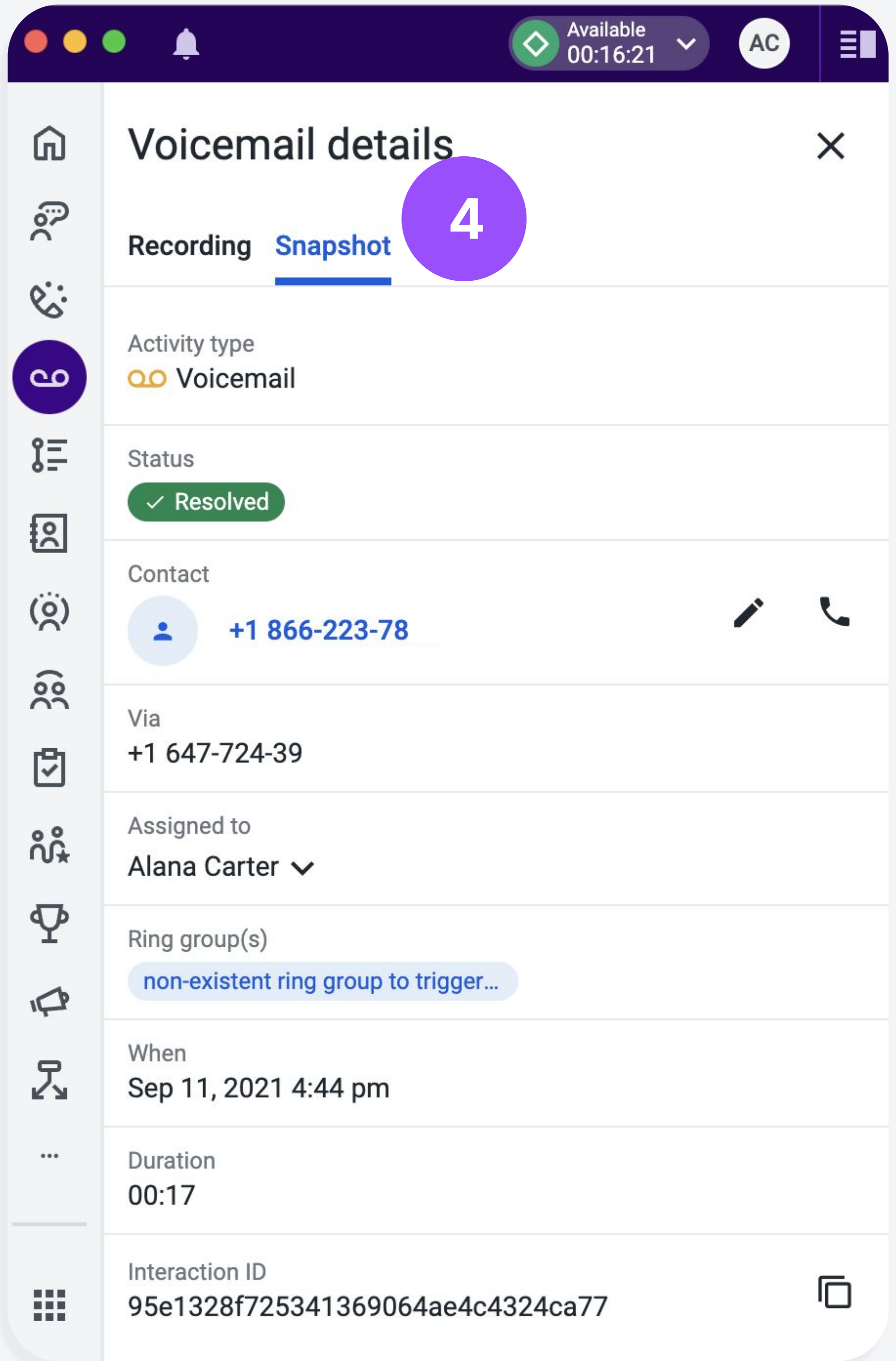
Listen to the voicemail by clicking on the **Play** button **[1]**.

Click on the **More options** button **[2]** to:

- Re-open or resolve the voicemail.
- Assign the voicemail to a specific agent.
- Call the customer back.

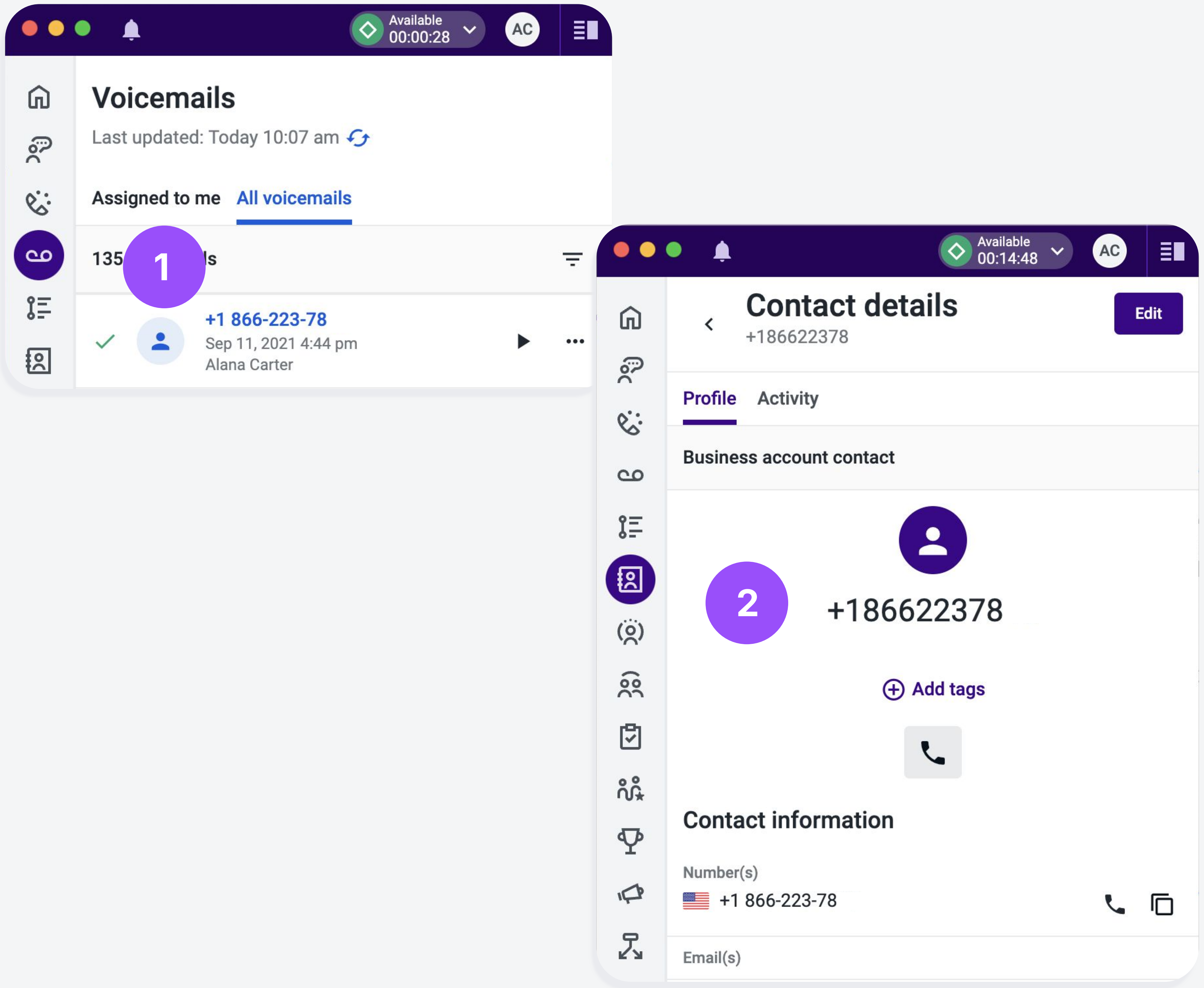
Handling Voicemails





Clicking on the voicemail itself (ie. in the white space of the record) **[3]** gives you a drill down of details for the selected call in the **Snapshot** tab **[4]**.

Opening the Contacts' Profile Page



By clicking on a contact's name **[1]**, you're redirected to the contacts profile page **[2]** where you can see information about the contact as well as their personal call history.