



# **Cisco Contact Center Enterprise Manage Digital Channels Gadget User Guide**

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## Preface

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## Change History

This is the first release of the document.

## About this guide

This guide describes how to use digital channels to interact with customers.

## Audience

This guide is intended for contact center agents and supervisors who want to use digital channels on Finesse desktop for interaction.

## Related Documents

*Table 1:*

Document or resource	Link
Cisco Finesse Agent and Supervisor Desktop User Guide	<a href="https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/products-user-guide-list.html">https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/products-user-guide-list.html</a>

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We appreciate your comments.

# Conventions

This document uses the following conventions:

Convention	Description
<b>boldface font</b>	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, folder names, and submenu names.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Choose <b>Edit</b> &gt; <b>Find</b>.</li> <li>• Click <b>Finish</b>.</li> </ul>
<i>italic font</i>	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> <li>• To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills.</li> <li>• A syntax value that the user must replace. Example: IF (<i>condition, true-value, false-value</i>)</li> <li>• A book title. Example: See the <i>Cisco Unified Contact Center Enterprise Installation and Upgrade Guide</i>.</li> </ul>
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> <li>• Text as it appears in code or that the window displays. Example:  <pre>&lt;html&gt;&lt;title&gt;Cisco Systems, Inc. &lt;/title&gt;&lt;/html&gt;</pre> </li> </ul>
< >	<p>Angle brackets are used to indicate the following:</p> <ul style="list-style-type: none"> <li>• For arguments where the context does not allow italic, such as ASCII output.</li> <li>• A character string that the user enters but that does not appear on the window such as a password.</li> </ul>







## CHAPTER 1

# Manage Digital Channels gadget

As agents and supervisors, use the **Manage Digital Channels** gadget to interact with customers through digital channels. The gadget is available only with SSO login. The gadget is available when your administrator has configured and assigned at least one digital channel to you. The following digital channels are available:

- **Chat/Social Channels**—This is a virtual media channel on the Finesse desktop to provide a common interface to control multiple underlying digital media channels. This channel represents the following digital media channels:
  - Chat
  - SMS
- **Email**—Represents the email digital channel.
- [Get started with Manage Digital Channels gadget, on page 1](#)
- [Accept Tasks, on page 4](#)
- [View Tasks window, on page 4](#)
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## Get started with Manage Digital Channels gadget

After signing in to the Finesse desktop, you must explicitly sign in to the **Manage Digital Channels** gadget and manually change the digital channels state to **Ready**. You must be in the **Ready** state to receive tasks for interaction. There's no explicit sign-out for this gadget.



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**Note** To sign out of Finesse desktop, all the channels (voice and digital) must be in **Not Ready** state.

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### Before you begin

- Ensure that your administrator has configured the **Manage Digital Channels** gadget and you have access to it.

- Ensure that your Finesse desktop has internet connectivity with the required bandwidth and latency as specified in the [Cisco Finesse Administration Guide](#), so that it can load the **Manage Digital Channels** gadget from the cloud datacenter.

**Step 1** Sign in to Finesse desktop.

**Step 2** From the left pane, select **Manage Digital Channels**. The **Manage Digital Channels Sign In** dialog appears.

**Step 3** Click **Sign In**.

The gadget signs in to all the digital channels (**Chat/Social Channels** and **Email**) that are configured for the user. The digital channel icons that are available at the top of the window, display your status.

After you successfully sign in, by default all the digital channels are in **Not Ready** state.

**Note** When there's a sign-in failure for any of the media types, notifications appear with the sign-in failure reason. Sign-in is retried automatically for the configured number of times.

**Step 4** Click the drop-down arrow next to the **Chat/Social Channels** and **Email** icons.

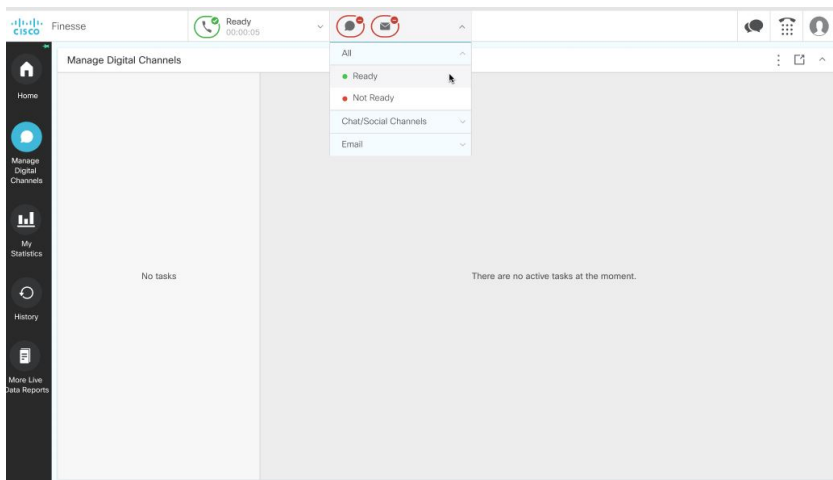
The following list appears:

- **All**
- **Chat/Social Channels**
- **Email**

Under each channel, there's an option to move the channel to **Ready** or **Not Ready** state. The **Not Ready** reasons for voice and digital channels are the same.

**Note** The drop-down doesn't list the already selected reason. For example, if the status is **Not Ready Lunch**, this option isn't listed.

**Figure 1: Digital Channels State Change Selection**



**Step 5** Select **Ready** to be available for the required digital channel.

If any of the digital channels fail to change their state to **Ready**, a pop over notification appears on the top-right corner of the window. The gadget retries to sign in for the configured number of times.

The digital channels have a visual representation for different states as shown in the following table:

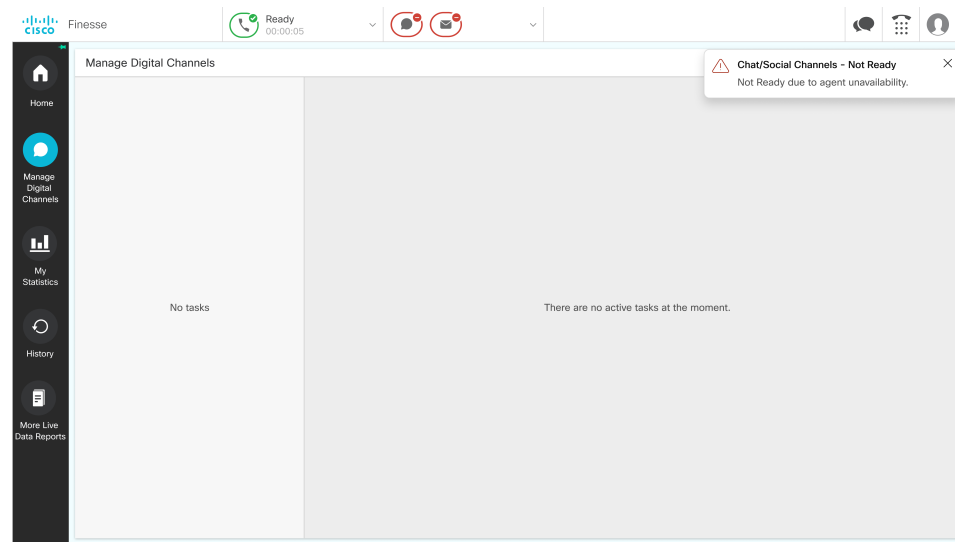
**Figure 2: Visual Representation of Digital Channels State**

	Logo	Ready	Not Ready	Not Ready - due to non routable	Comment
1.					• Not signed in.
2.					• Sign in failed. Unable to sign-in to any of the digital channels.
3.					• All the digital channels are in Not Ready state.
4.					• All the digital channels are in Ready state.
5.					• Partially signed in. Only some channels are signed in.

## State change of digital channels

If you don't accept an interaction before a stipulated time, a pop-over notification appears at the top-right corner of the window and the digital channels state changes to **Not Ready** automatically.

**Figure 3: Automatic State Change**



When any of the **Chat/Social Channels** go to the **Not Ready** state, all the **Chat/Social Channels** go to the **Not Ready** state. You can continue to use the active tasks but no new tasks are presented. If you sign out, the active tasks are **Closed** or **Transferred** as per the administration configuration. You must manually change the respective channel state to **Ready** to start receiving tasks again.

When you manually change your state to **Not Ready**, you must select an appropriate reason to indicate why you're changing your state to **Not Ready**. Always select a **Not Ready** reason specifically for **Chat/Social Channels** and **Email**. The specific **Not Ready** reasons aren't available for the **All** option. The specific **Not Ready** reasons take precedence over the **Not Ready** option for **All**. For example, if you've selected a custom not ready reason such as **Not Ready Lunch**, when you select the **Not Ready** option from the **All** option,

there's no change. However, if you have selected **Not Ready** from the **All** option and later select **Not Ready Lunch**, then the state changes to **Not Ready Lunch**.

When changing the state, it's possible for any of the media types that are under **Chat/Social Channels** to fail due to network issues or other such conditions. If this happens, the icon indicates the partial state as shown in the table. You must manually change the respective media state to **Ready** to start receiving tasks again.

## Accept Tasks

When you're in **Ready** state, you start receiving pop over notifications from customers for all the digital channels. The notifications are presented at the bottom-right corner of the window. The notifications display the customer details (that the administrator has configured) with the **Accept** button.

Click **Accept** to start an interaction. When you accept a new task, the new task is appended to the existing Tasks list and becomes active. Ensure that you accept the incoming interactions within the predefined time as shown in the countdown timer. Otherwise, the interactions get routed to the next available agent and your state changes to **Not Ready** automatically.

You can also interact with multiple customers on multiple channels at the same time. Accept the notifications that are presented to you for various digital channels.



**Note** The number of tasks that are presented to you for each media (Chat, SMS, and Email) is configured by your administrator.

Different media may have different accept timers as per the configuration.

The following table lists the results of not accepting a task within the predefined time for each channel:

Media Notification	State Change to Not Ready	Notes
Chat	Chat/Social Channels	First the <b>Chat</b> becomes <b>Not Routable</b> and then all the media under <b>Chat/Social Channels</b> are changed to the <b>Not Ready</b> state.
SMS	Chat/Social Channels	First the <b>SMS</b> becomes <b>Not Routable</b> and then all the media under <b>Chat/Social Channels</b> are changed to <b>Not Ready</b> state.
Email	Email	Only <b>Email</b> channel is changed to the <b>Not Ready</b> state.

## View Tasks window

When you accept any digital interaction, that is, **Chat**, **SMS**, or an **Email**, a **Task** window is displayed. By default, the **Task** window is maximized. The **Task** window is divided into multiple sections as follows:

- Tasks list

- Customer details
- Interaction pane
- Typing area



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**Note** When the **Task** window is loaded, if you accept a voice call, the voice channel displays at the top and the **Task** window is pushed down. This happens only when the voice channel is configured as a page level gadget.

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## Tasks list

The Tasks list appears on the left side of the **Task** window. It lists all your digital channel interactions. The number of tasks that has to be handled by you for each media (Chat, SMS, and Email) is configured by your administrator.

When you accept a new task, the new task is appended to the existing Tasks list and becomes active. All digital channels have their specific icons for identification. By default, all the interactions display the following:

- Icon
- Queue name
- Timer
- Customer name or any other data that is configured by the administrator



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**Note** This field is always in bold font.

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The timer indicates the time duration of the interaction. Below the timer of each interaction, the unread messages number is highlighted. When you select an interaction that has unread messages, the highlight and the number are removed for that interaction. If you receive a voice call, the timer may stop as per the configuration.

Administrators can configure more details that have to be displayed, so that it's easy for you to identify and interact. Some of the details that the administrator can configure are as follows:

- Customer name
- Contact number

You can collapse and expand this list using a mouse or shortcut keys. Expand the list to view any new messages from existing interactions. You can traverse through the list using the Up and down arrows of the keyboard. In between interactions, if you've moved out of the **Manage Digital Channels** gadget and then receive messages from ongoing interactions:

- If you haven't pinned the navigation pane:
  - a pop over notification is displayed at the top-right corner of the Task window, the unread messages number is incremented and highlighted.
- If you've pinned the navigation pane:

- displays a red dot next to the **Manage Digital Channels** gadget in the navigation pane.
- If the gadget is part of a multi-tab:
  - displays a red dot on top of the **Manage Digital Channels** gadget tab.

## Customer details

The customer details display the customer information that is configured by your administrator. It also displays the customer name (or any other data that is configured by the administrator), timer, **Transfer** button, and **End** button at the top of the details. It is next to the **Tasks** list. It displays a maximum of 10 fields. If more than 10 fields are configured, a scroll bar appears. You can collapse and expand the customer details area using a mouse or shortcut keys.

As per the configuration, you can edit some or all the customer details. When you hover the mouse over an editable field, the color of the field is shaded and displays a copy icon. To edit the customer details:

1. Click on the editable field.
2. Make the necessary changes and click **Save**.

Displays the success or failure messages at the bottom-left corner in the Customer details area.

3. Click **Revert** to cancel the changes and retain the previous values.

If you edit any of the fields, not save, and click **Transfer** or **End**, the gadget displays the **Unsaved Changes** dialog box. You can continue without saving or cancel to come back to the **Task** window and save the changes.

## Interaction pane

The interaction pane appears on the right side of the **Tasks** list and below the **Customer Details** area. This pane lists all the interactions that you're having with a particular customer. When loading for the first time, it displays a loading message. If there's a failure to load the data and if you think that it's a temporary issue, click **Try Again** to reload the data.


## Common functionalities of Digital Channel interactions

- Text Attachments
- Email Attachments
- Templates
- Rich Formatting
- Trigger Workflows
- Announcements
- Delivery Receipts

## Text attachments

An attachment is a file that is sent along with a text message.

**To add a text attachment:**

1. Agents can either Drag and Drop the attachments into the compose box or click the  icon and browse the file to upload an attachment along with the response in the compose box.



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**Note** You can send multiple attachments with a text message.


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2. Agents can preview the file and its size before sending it to the customer.
3. Click the X icon to delete an attachment.

## Email attachments

An attachment is a file that is sent along with an email message. Attachments can be inline with the email body or attached as a regular attachment.

To add an email attachment:


1. Click the  icon and browse the file to upload an attachment.
  - The administrator configures the maximum file size, formats, and the maximum number of files you can upload.
  - You can view and download the attachments from the received emails from the email thread.
  - Outbound attachments that do not fulfill the PCI rule will be dropped. Inbound attachments that fail to pass the PCI validation will be greyed out. When you select such attachments, a banner message is displayed above the email composer to inform the reason for the disabled attachment(s).
2. Agents can preview the file and its size before sending it to the customer.
3. Click the X icon to delete an attachment.

## Templates

Agents can use canned responses in the form of message templates. These templates help maintain consistency in agent responses and reduce the time taken to send commonly used messages.

### Attach a template

To use a template in a conversation, follow these steps:

1. Click the  (Template) icon in the compose box.

A modal with the list of configured template groups appears on the screen.

The **All Templates** tab consists of a list of all the templates configured for a team.

2. Click **More** to view the complete list of template groups configured for a team.
3. Select a template group to view the list of templates created under that template group.
4. Select the template. The respective information is loaded into the composer.




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**Note** You can use the search field to filter the template names by entering a keyword in the search field and selecting a template based on the results.

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5. Click **Send**.

## Locked templates

Administrators have the privilege to lock the templates while creating them on the Webex Engage Admin

Console. You can view the  (Lock) icon beside the locked templates. You can use these locked templates as-is and cannot edit these templates. If you try to perform an edit action, an error message will appear on the screen.


## Templates with replaceable parameters

Administrators can create templates with replaceable parameters for agents to send personalized messages to the customers. You can load these templates into the composer and use the Tab key to traverse between the replaceable parameters and change them.

## Templates with dynamic substitution of system parameters in the agent desktop

You can use the templates that administrators configure with system parameters in the template body. When these templates are used in the chat conversations, the respective system parameters are dynamically substituted in the composer.

## Rich formatting in social channels

You can click the  (formatting) icon to apply rich formatting styles to the Social Channels text before replying to the message. You can select the required rich formatting style from the list above the compose box for email channel text before replying to the message.

You can apply the following rich formatting styles to the reply message in the compose box:

Formatting Style	Description
Bold	Makes the text bold
Italics	Italicizes the text
Strikethrough	Draws a line through the text




---

**Note** You can apply only one style to the selected text. For example, if you choose to make a certain word or sentence bold, you cannot italicize the same.

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## Rich formatting in email messages

You can apply the following rich formatting styles to the reply message in the email body:


Formatting Style	Description
Heading 1	Applies a pre-set font and style to the text.
Bold	Makes the text bold.
Italics	Italicizes the text.
Underline	Underlines the text.
Strikethrough	Draws a line through the text.
Font color	Changes the font color.
List by ordered	Creates an ordered list.
List by bullet	Creates a bulleted list.
Blockquote	Indents the text and marks it as a quotation with a vertical line at the left margin.
Emojis	Inserts an emoji.
Link	Inserts a hyperlink on the selected text.
Indent left	Indents the text to the left.
Indent right	Indents the text to the right.
Table	Inserts a table in the text area.

## Trigger workflows

Workflow is an automation and fulfilment framework geared towards automation in the contact center. Workflow can be running an API call or JavaScript code triggered on demand by an agent on the Agent Desktop.

You can easily integrate Cisco Finesse Gadget with external systems to ensure that customer records are synchronized in real time. This can be achieved with the help of workflows. You can trigger these workflows when you are in the middle of a conversation with the customer.

To trigger a workflow, follow these steps:

1. Click the  (Trigger workflow) icon in the compose box for Social Channels and above the compose box for the email channel.  
A pop-up window with the list of pre-configured workflows appears on the screen.
2. Select a workflow and click the **Trigger** button.
3. If the workflow has been configured to accept input parameters from the agent, a pop-up window appears. Enter the required parameters and click the **Trigger** button.

Once the workflow is triggered, an audit trail in the form of an announcement is appended to the chat thread.

4. Click **Send**.

## Announcements

You can view audit trails of conversation lifecycle events/ journey milestone summaries (appended via the Append conversation node) with the help of announcements. You can view the announcements in the chat thread on the Agent Desktop.

When a conversation is CLOSED, the announcement "Conversation CLOSED" is displayed with the timestamp in the chat thread.

## Delivery receipts

A delivery receipt is recorded against each outbound message in the message thread whenever you send a message to the customer.

## Typing area

By default, the Typing area appears below the Interaction pane. Use this area to type the messages. Press Enter or click the **Send** button to send the messages to the customers. Emojis and attachment icons are available for interaction. The following are the options that are available for each channel:

*Table 2:*

Digital Channel	Option	Notes
Chat	<ul style="list-style-type: none"> <li>• Attachment</li> <li>• Emoji</li> <li>• Event trigger</li> </ul>	—
SMS	<ul style="list-style-type: none"> <li>• Emoji</li> <li>• Event trigger</li> <li>• Template</li> </ul>	—
Email	<ul style="list-style-type: none"> <li>• Attachment</li> <li>• Rich Text</li> <li>• Emoji</li> <li>• Event trigger</li> </ul>	—

## Manage SMS conversations

The Short Message Service (SMS) channel enables customers to reach out to agents by sending an SMS. Customers can send SMS to a Longcode, Shortcode, or toll-free number. A new conversation is created in

the SMS widget when a customer sends a message. Agents can then handle the chat and send a response to the customer.

The SMS widget enables agents to respond to SMS messages through the conversation pane in the Agent Desktop.

You can use the agent desktop to transfer and end an SMS conversation.

You can send SMS even when there is no internet connectivity.

### *About SMS widget*

The SMS widget supports the following features:

- [Templates](#)
  - [Attach a template](#)
  - [Locked templates](#)
  - [Templates with replaceable parameters](#)
  - [Templates with dynamic substitution of system parameters in the agent desktop](#)
- [Trigger workflows](#)
- [Announcements](#)
- [Keyboard Shortcuts](#)
- [Delivery receipts](#)

The SMS widget supports the following interactions:

- [Respond to SMS conversation](#)
- [Transfer an SMS Conversation](#)
- [End an SMS Conversation](#)

### *Respond to SMS conversation*

After an SMS conversation is assigned to an agent, the popover displays the Queue Name, Phone Number, Source Number, Timer, and Accept button. The timer indicates the time that has elapsed since you were offered the SMS conversation.

Once an SMS conversation is assigned to an agent, it lands in the Task List pane available in the left pane of the Agent Desktop. An agent can view the Queue Name, Phone Number, Source Number, Timer, and Accept button. The timer indicates the time elapsed since you were assigned the SMS conversation.

#### **Before you begin**

After you successfully sign in to the Manage Digital Channels on the Cisco Finesse desktop, the configured digital channels are in the **Not Ready** state. You must manually change your state from **Not Ready** to **Ready** to receive requests.

#### **To respond to a chat:**

1. Click the **Accept** button in the request. The request opens in the compose box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- Customer Name
- Queue Name
- Message Thread
- Agent Name
- Date
- Timer




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**Note** The customer's messages are represented by a gray bubble with the initials of the customer name inside the bubble. A solid blue bubble represents the agent messages.

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2. Enter your response in the compose box.




---

**Note** The compose box supports a maximum of 1000 characters. Whenever the character count exceeds the configured limit, the **Send** button is disabled, and an error message is displayed below the composer box in red to correct the character limit.

---

3. Click **Send** or press **CTRL + Enter**.

The customer receives the response.

## Manage Livechat conversations

The Livechat channel enables businesses to engage and support their website visitors and customers.

Customers can initiate a Livechat with an agent and send chat messages. Agents can then handle the Livechat and send a response to the customer from the Livechat widget on the Desktop.

The Livechat widget enables agents to respond to chat messages through the conversation pane.

You can use the desktop to transfer and end a Livechat conversation.

### About Livechat widget

The Livechat widget supports the following features:

- [Text attachments](#)
- [Templates](#)
  - [Attach a template](#)
  - [Locked templates](#)
  - [Templates with replaceable parameters](#)
  - [Templates with dynamic substitution of system parameters in the agent desktop](#)

- [Trigger workflows](#)
- [Announcements](#)
- [Keyboard Shortcuts](#)

The Livechat widget supports the following interactions:

- [Respond to SMS conversation](#)
- Transfer a Livechat Conversation
- End a Livechat Conversation

### *Respond to a Livechat conversation*

Once a Livechat conversation is assigned to an agent, the popover displays the Customers Name, Email, Queue Name, Timer, and Accept button. The timer indicates the time elapsed since you received the Livechat conversation.

#### **Before you begin:**

After you successfully sign in to the Manage Digital Channels on the Cisco Finesse desktop, the configured digital channels are in the **Not Ready** state. You must manually change your state from **Not Ready** to **Ready** to receive requests.

#### **To respond to a chat:**

1. Click the **Accept** button in the request. The request opens in the compose box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- Customer Name
- Queue Name
- Message Thread
- Agent Name
- Date
- Timer



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**Note** The customer's messages are represented by a gray bubble with the initials of the customer name inside the bubble. A solid blue bubble represents the agent messages.

All previous conversations that the customer had with self-service or Bot is available to the agent.

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2. Enter your response in the compose box.




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**Note** The compose box supports a maximum of 1000 characters. Whenever the character count exceeds the configured limit, the **Send** button is disabled, and an error message is displayed below the composer box in red to correct the character limit.

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3. Click **Send** or press **Enter**.

The customer receives the response.

## Manage email conversations

The Email channel enables customers to send emails with tables, embedded links, and attachments.

The email widget enables agents to respond to email messages through the conversation pane.

You can use the desktop to respond, transfer, and end email conversations.

### About email widget

The email widget supports the following features:

- [Email attachments](#)
- [Trigger workflows](#)
- [Templates](#)
  - [Locked templates](#)
  - [Templates with replaceable parameters](#)
  - [Templates with dynamic substitution of system parameters in the agent desktop](#)
- [Rich formatting in email messages](#)

The Email widget supports the following interactions:

1. [Respond to an email conversation](#)
2. [Send a reply](#)
3. Transfer an Email Conversation
4. End an Email Conversation

### Respond to an email conversation

Once you receive an email conversation, a popover appears on the bottom-right corner of the screen. The popover displays the Customers Name, Email ID, Account Number, Address, and Issue details.

#### Before you begin

After you successfully sign in to the Manage Digital Channels on the Cisco Finesse desktop, the configured digital channels are in the **Not Ready** state. You must manually change your state from **Not Ready** to **Ready** to receive requests.

**To respond to a chat:**

1. Click the **Accept** button in the request. The request opens in the composer box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- From email address
- To email address
- Email subject
- Email thread (if any)
- Timestamp and status of the email (Sent/Received/DRs)
- Announcements
- Attachments (if any, in the inbound email)
- Reply, Reply All, Forward, and Cc icons
- Transfer button

2. Click **Send**.


The customer receives the response.





### *Send a reply*

You can respond to add email by adding images and attachments or adding more recipients.

#### **Before you begin**

You must be in a Ready state to receive an email request.

1. Click **Accept** button in the email request. The request opens in the email composer, and an interaction pane is displayed.
2. Click the  icon to expand and collapse each email and its history.
3. Select the **Reply** option to send a reply only to the sender or select the **Reply All** option to respond to all the recipients or select the **Forward** option to send it to a new recipient.
  - If you receive a new email while replying (to an email), a banner message View all messages to take further action appears above the email composer. The new email is shown in blue at the top of the thread.
  - When you Reply to an email, the To and Subject fields are auto-populated and cannot be edited.
  - When you Reply All to an email, the To and Subject fields are auto-populated and cannot be edited. The Cc field gets auto-populated. You can add or remove email ids in the Cc field. Moreover, you can hide the Cc field completely.
  - When you Forward an email, the subject field is auto-populated. You can add or remove email ids in the To and Cc fields. The email body gets loaded with the latest email in the composer.
  - When you switch from Reply to Reply All, the To and Cc fields are automatically populated. You can add or remove the email ids in the To and Cc fields. The email body is retained in the composer.

- When you switch from Reply to Forward, the To and Cc field are emptied, and the email body is retained in the composer.
  - When you switch from Reply All to Forward, the To and Cc field are emptied, and the email body is retained in the composer.
  - When you switch from Reply All to Reply, the To field is automatically populated, the Cc field is emptied, and the email body is retained in the composer.
  - When you switch from Forward to Reply, the To field auto-populates, and the email body is retained in the composer.
  - When you switch from Forward to Reply All, the To and Cc fields auto populate, and the email body is retained in the composer.
  - When a user composes a message and doesn't send it, such email messages are saved as a draft and available in the composer. When a user composes a message and navigates/switches to another conversation without performing any action, such messages are saved as a draft and available in the composer until the user clears it manually.
4. (Optional) Click Cc to send a carbon copy of the email to more recipients.
  5. Compose the email in the email body.
  6. (Optional) You can apply Rich Formatting styles to the email body.
  7. (Optional) You can add Email Attachments.
  8. (Optional) You can attach Templates.
    - If you enter the text in the composer and then select a template, the existing text will be replaced with the template.
  9. (Optional) You can Trigger Workflow.
  10. You can click the  Ellipses icon below the email body to view the complete history of the email conversation.
  11. You can click  Minimize icon to minimize the compose box.
  12. You can click  Maximize icon to maximize the compose box.
  13. You can click  Discard icon to discard an email.
  14. Click **Send**.

## End interactions

Click **End** to close an interaction.

If force wrap-up is not enabled, the interaction closes successfully and the focus is shifted to the latest accepted interaction.



If force wrap-up is enabled, a reverse-timer starts on the **Wrap-up Reasons** drop-down. A disabled **Close** button appears on the right side of the **Wrap-up Reasons** drop-down.

Select an appropriate wrap-up reason. A green button appears on the **Wrap-up Reasons** drop-down. The **Close** button is enabled.

Click **Close** to close the interaction. Else, after the timer reaches zero, the interaction is closed automatically.

## Transfer interactions

While interacting with customers, you can transfer the interactions to one of the configured route points. If you get a voice call and accept the call, you may experience one of the following as per the configuration:

- The **Transfer** button is disabled and the timer of the interaction is stopped.
- The **Transfer** button is available and the timer continues.



**Note** When you get a voice call, the behavior of **Transfer** may vary for each media (Chat, SMS, and Email). This change depends on the configuration of the respective media.

### Step 1 Click **Transfer**.

The Transfer drop-down lists the route points that are configured for the specific media type.

**Note** The list of available route points aren't the same as that of the voice phone book that is available on the desktop.

### Step 2 If force wrap-up is configured, select an appropriate wrap-up reason from the **Wrap-up Reasons** list, and click **Apply**.

A green button appears on the **Wrap-up Reasons** drop-down.

### Step 3 Select the required route point to transfer the interaction.

The interaction is moved to the selected route point and moves out of your list.

**Note** When interactions are transferred and an agent accepts from the queue, all previous interactions between the customer and the previous agents are available for the new agent.

## Keyboard Shortcuts

Use the keyboard shortcuts for easy access to the **Manage Digital Channels** gadget. The keyboard shortcuts are available for both agents and supervisors.

**Table 3:**

Group	Action	Shortcut Key	Notes
Interaction Control	Expand/Collapse	Ctrl + Alt + 8	—

Group	Action	Shortcut Key	Notes
Agent State	Ready for Email	Ctrl + Shift + 4	—
	Ready for Chat/Social Channels	Ctrl + Shift + 5	—
	Not Ready for Email	Ctrl + Shift + 6	—
	Not Ready for Chat/Social Channels	Ctrl + Shift + 7	—
Task List	Shift focus to the next active task	Ctrl + Shift + 8	—
	Shift the focus to the previous task	Ctrl + Shift + 9	—
Send Chat/Social Channels messages	Send Chat and SMS	Ctrl + Enter (in Windows) OR Cmd + Enter (in Mac)	—
Application	Expand/Collapse the Task Panel	Ctrl + Alt + T	—
	Ready for All Digital Channels	Ctrl + Shift + V	—
	Open Digital Channels State Control	Ctrl + Shift + L	—
	Not Ready for All Digital Channels	Ctrl + Shift + Z	—
Call Handling and Digital Handling	Answer/Accept Call Accept for all digital channels	Ctrl + Alt + 9	—

## Finesse Failover

If the Finesse server that you're currently signed-in to goes out of service, a banner appears at the top of the desktop notifying that the desktop has lost connection to the server. After reconnecting (failover or failback), the Manage Digital Channels gadget and the state controls are unavailable. The gadget is unavailable to the users until it is able to determine and retain the previous state across all the channels. The desktop reload starts only after a healthy connection is reestablished with the Finesse server.

Figure 4: Failover

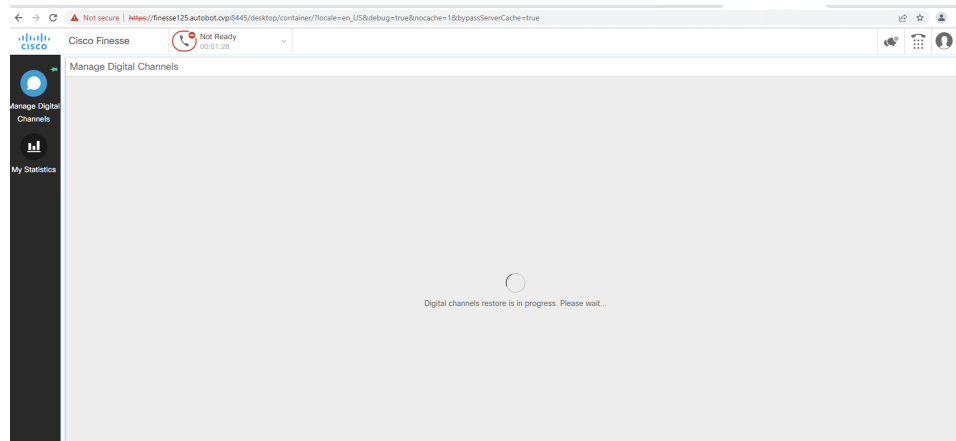
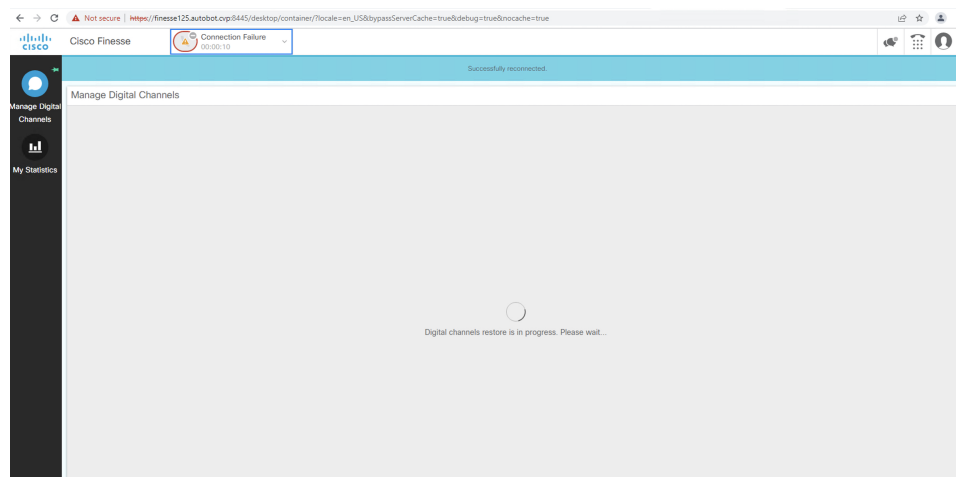


Figure 5: Failback



The agents state and the tasks that they are working on are retained after the failover or failback. The call variables and wrap-up reasons selected and the timers for how long the agents are active on a particular task are retained.

For more information about failover, see the *Finesse Desktop Failover* section in the [Cisco Finesse Agent and Supervisor Desktop User Guide](#).

