

Job Aid: Best Practices and Resolution to Common Issues

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Internal User

In this topic the user will become familiar with best practices to be followed to resolve various commonly experienced issues.

Learning Objectives

The objective of this lesson is to familiarize the Representative with various Salesforce Agent Console and CCP best practices.

Roles

This exercise will be completed by the following users:

- Representatives
- Supervisors
- Managers

1. Daily Steps and Actions

Step 1: Test audio every morning:

Representatives and Managers frequently transition between remote and office environments. To maintain consistent audio quality and troubleshoot any issues promptly, it's imperative to include daily audio testing as part of the morning routine. Refer to the [Configuring Headsets and Phones for Amazon Connect CCP](#) job aid.

Action: Test your mic and speakers/headphone every day before making yourself available to take calls.

Step 2: Log out daily at the end of the shift:

Generating accurate and clean reports depends on the integrity of logged data. Therefore, it's crucial to ensure all Representatives log out at the end of their shifts to maintain data integrity and facilitate smooth operations for subsequent shifts. Refer to the [Logging into and out of the Salesforce Agent Console and Connect CCP](#) job aid.

Action: Ensure all Representatives log out at the end of their shift to maintain data integrity.

Step 3: Log into Global Protect even if it says connected:

Security is paramount in today's digital landscape. To guarantee a secure connection and prevent potential vulnerabilities, Representatives must log into Global Protect regardless of the apparent connection status. This ensures continuous protection of sensitive data and access to the EDD APP Store even when working in the office on the EDD network.

Action: Log into Global Protect regardless of connection status for access to the EDD APP Store.

Step 4: Verify desk phone number:

Relying solely on numbers written on desk phones can lead to inaccuracies and communication issues. Representatives must verify their desk phone numbers by calling their cell phone to ensure accuracy and seamless

communication with customers. The correct phone number is needed to set up your audio configuration.

Action: Representatives must verify their desk phone numbers to ensure accuracy.

Step 5: Disable browser pop-up blockers:

Smooth functionality of Connect and the Salesforce Agent Console, particularly notifications, relies on browser pop-ups. For optimal functionality, Representatives must not disable browser pop-ups.

Action: Representatives must disable browser pop-ups to ensure smooth operation of Connect and Salesforce Agent Console.

Step 6: Do not kill or close any browser pop-ups:

Pop-ups running in the background provide functionality for the Representative's status to automatically change when terminal is left idle.

Action: Representatives must allow browser pop-ups to run in the background.

2. Common Issues and Resolutions

Bluetooth Headset

Issue: Representatives are unable to connect to their desk phones or Bluetooth headsets.

Action: Ensure Representatives use USB headsets. Refer to the [Configuring Headsets and Phones for Amazon Connect CCP](#) job aid to configure the headsets properly.

Microsoft Edge

Issue: ICC users facing issues with Microsoft Edge.

Action: Representatives should use [Chrome](#) as the preferred browser.

Log-in Failures

Issue: Representatives having issues logging in.

Action: Refer to step by step instructions in the [Logging into and out of the Salesforce Agent Console and Connect CCP](#) job aid.

END OF REFERENCE JOB AID