

Member Services Phone System
Interaction Desktop
Job Aid

Table of Contents

Starting Your Workday	2
Launch Interaction Desktop	2
Change Your Status	3
How to Solve a Softphone Provisioning Error	4
Helpful Interaction Desktop Features.....	6
How to Choose the Correct Status	6
How to Change Your Password	7
How to Record Your Name for Voicemail	8
How to Access Voicemail	8
How to Answer Incoming Calls	10
How to Make Manual Callbacks on Behalf of a Workgroup	11
How to Warm Transfer a Call	12
How to Use Employee Directory	15
Look Up an Employee	15
Look Up a Department.....	15
Appendix	16
Understanding Telephone Aux Status	16

Starting Your Workday

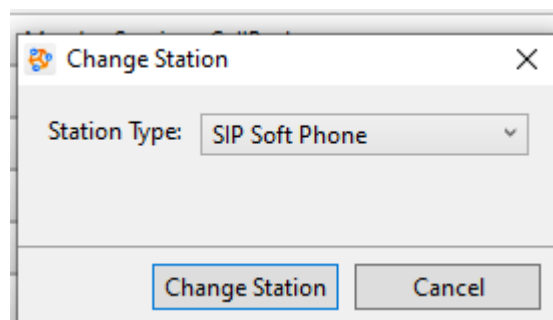
Launch Interaction Desktop

1. Double-Click the **Interaction Desktop** icon on your desktop. If your **Interaction Desktop** software authenticates and logs in automatically, please disregard step 2.



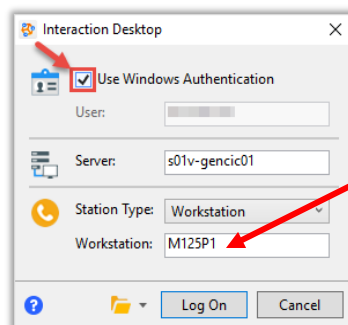
2. Click the box in front of **Use Windows Authentication** to display your user name in the **User** field.
3. If working remotely, make sure that the **Station Type** field displays **SIP Softphone**. If not, select **SIP Softphone** from the drop-down menu.

Note: **Station Type** is **SIP Softphone**. **Workstation** field will not display when **SIP Softphone** is the **Station Type**. **Softphone** automatically launches in the background at log in. Calls are sent to MSR's laptop, not a physical telephone. MSR uses headphones to access calls.



4. If working in the office, make sure that the **Station Type** field displays **Workstation** or **SIP Softphone** if docking a laptop. If working on a desktop at the Main Office, select **Workstation** from the drop-down menu.

Note: **Workstation** field should exactly match the label on the physical phone screen in the office.



5. Click **Log On** button.

If logging on for the first time, you may be prompted to change the **Interaction Desktop** password. Use the default password/PIN that was provided to you during training or orientation.

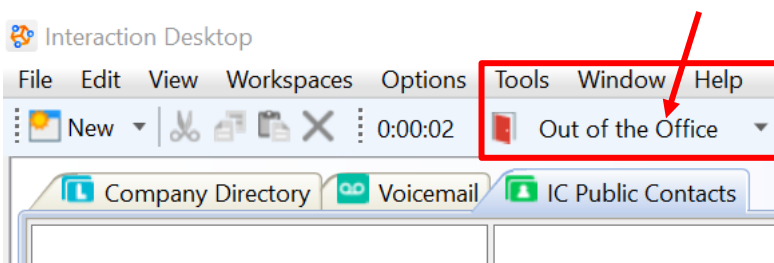
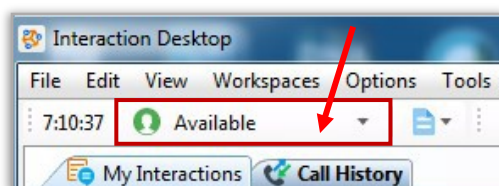
Note: This password is required by the program, and is changed every 60-90 days, but is NOT used daily. Continue to use the **Windows Authentication** checkbox instead.

Change Your Status

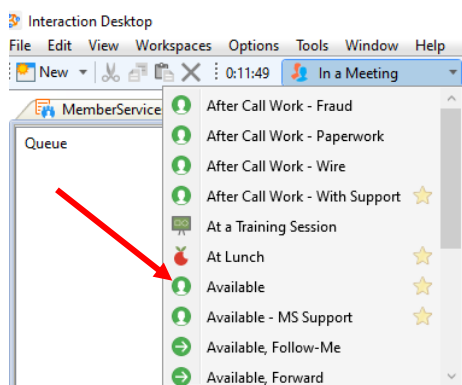
1. When you first arrive for the workday, after logging into **Interaction Desktop**, check the **Status** field.
2. Confirm that the status is **Out of Office**.

Important Note: The **Out of Office** status confirms that logging out of **Interaction Desktop** was done properly at the end of the previous workday. At the end of the day, always change the **Status** to **Out of Office** and log off of **Interaction Desktop** by selecting "File" and then "Exit."

New employees logging in for the first time will also see the **Out of Office** status to be changed to begin work.



3. In the **My Status** area, click the down arrow to display **Status** choices.
4. Choose **Available** Status from the drop-down list to begin receiving calls.



Note: Your phone will not ring if your **Interaction Desktop** is set to a non-available status, such as **On Vacation** or **In a Meeting**.

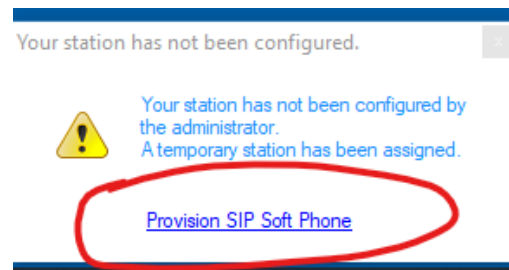
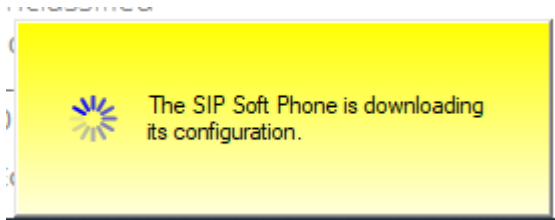
[CLICK HERE](#) for detailed information on choosing the correct **Status** in **Interaction Desktop**.

How to Solve a Softphone Provisioning Error

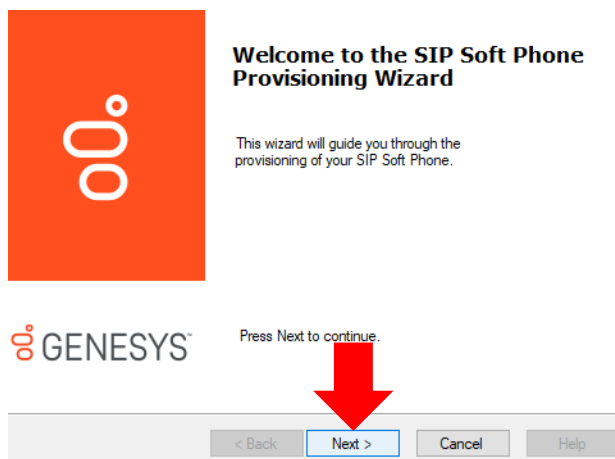
Softphone is a system used by Member Services Reps when answering member phone calls while working remotely. It runs in the background and opens automatically when the **Softphone** call type is selected at login.

If you receive the **Provisioning Error** message, follow these steps to resolve the problem:

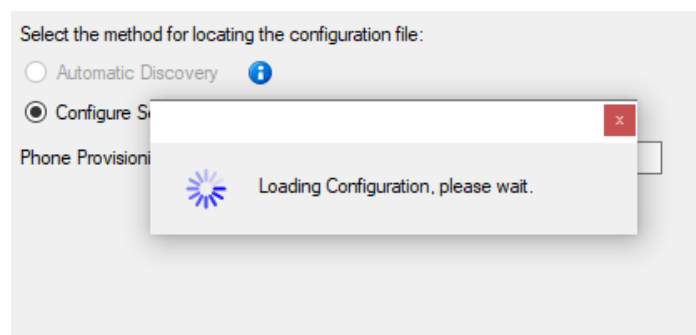
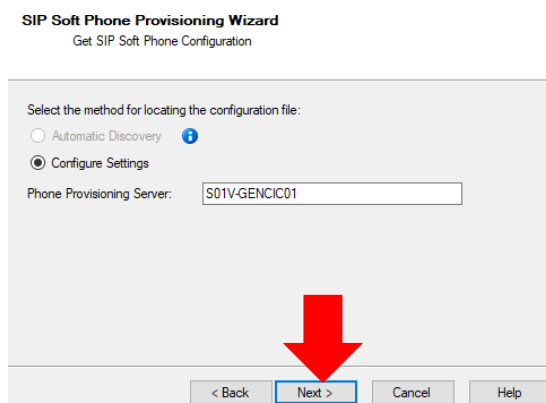
1. If you receive the **Softphone Provisioning Error**, click **Provision SIP Softphone** in the pop-up window.



2. Click **Next** on the **Provisioning Wizard** screen.



3. Leave the server setting as is and click **Next** (should be listed as s01v-gencic01). This starts the **Loading the Configuration** job.

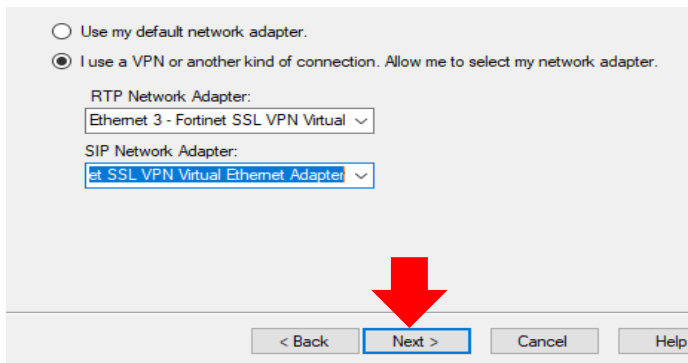


4. If **working remotely**, select the option, “**I use a VPN or another kind of connection**” radio button.

5. On the **RTP Network Adapter** drop-down, choose the option that includes **Fortinet** in the name. If you do not see this, you may not be connected to **VPN**. Click **Next**.

OR.....

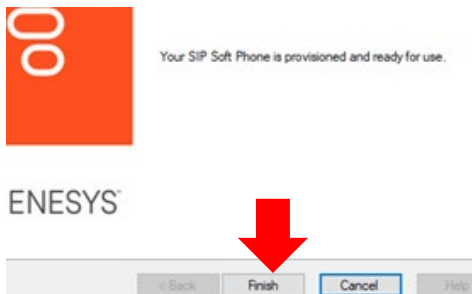
6. If **working in the office**, select the option “**Use My Default Network Adapter**” radio button. Click **Next**.



The screenshot shows a dialog box with two radio buttons. The first is "Use my default network adapter." and the second is "I use a VPN or another kind of connection. Allow me to select my network adapter." The second option is selected. Below the radio buttons are two drop-down menus. The first is labeled "RTP Network Adapter:" and shows "Ethernet 3 - Fortinet SSL VPN Virtual". The second is labeled "SIP Network Adapter:" and shows "et SSL VPN Virtual Ethernet Adapter". At the bottom are four buttons: "< Back", "Next >", "Cancel", and "Help". A red arrow points to the "Next >" button.

7. You should receive a success message. Click **Finish**.

You can now sign into **Interaction Desktop** using the **Softphone** station. If the error persists, contact the Help Desk.



[Back to Top](#)

Helpful Interaction Desktop Features

How to Choose the Correct Status

It is important to manage your **Status** to help ensure that all member calls are received and answered promptly.

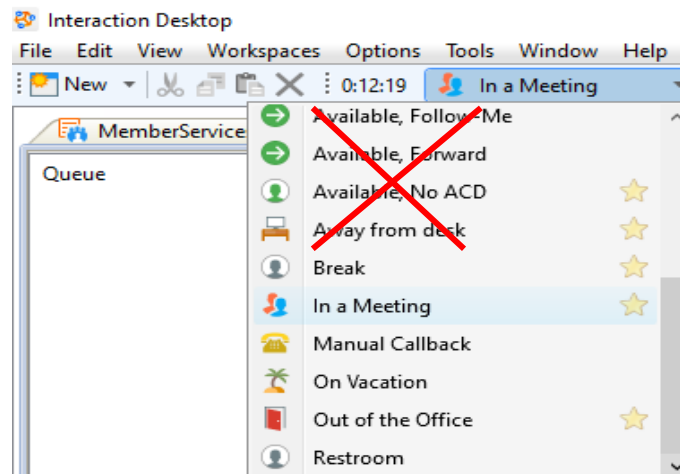
Status features include the following:

- To receive calls, your **Status** must be set to **Available** status.
- In the **Available** status, the phone will ring by default, for 30 seconds before changing the representative's **Status** to "**Agent Not Answering.**"
- In a **Non-Available** status, such as **On Vacation** or **In a Meeting**, calls will be auto-routed to another available representative.
- You can use **Status Notes** to alert internal callers to the reason for your **Status** setting.

DO NOT use the following **Status**':

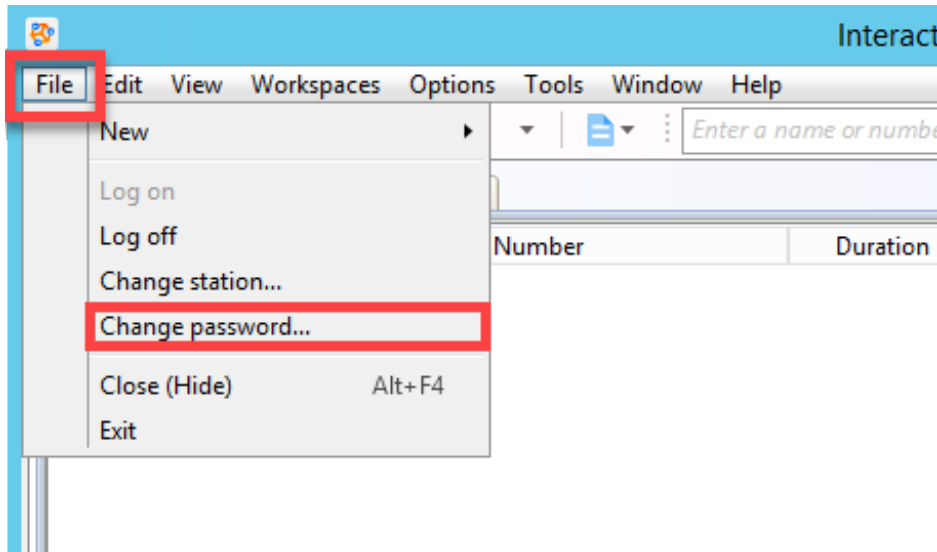
- Available, Follow-Me
- Available, Forward
- Available, No ACD
- Away from Desk

[CLICK HERE](#) for Auxiliary Status Guidelines.

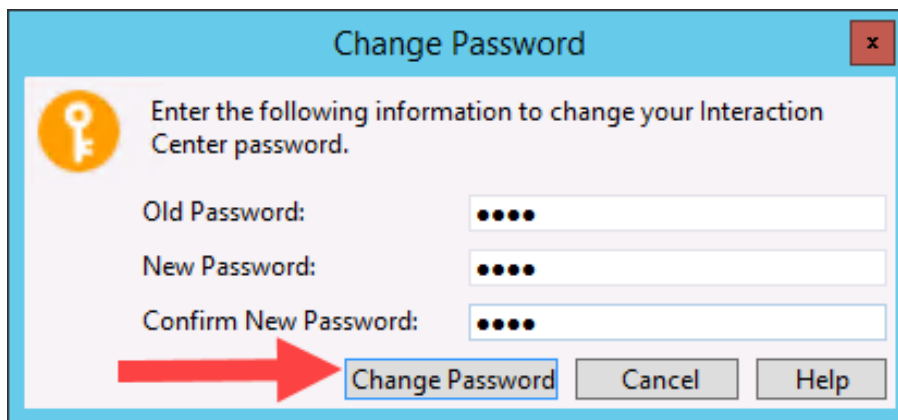


How to Change Your Password

1. Click **File > Change password**.



2. Enter the old password in the **Old Password** field in the **Change Password** dialog box.
3. Enter the new password in the **New Password** field.
4. Enter the new password in the **Confirm New Password** field.
5. Click **Change Password**.

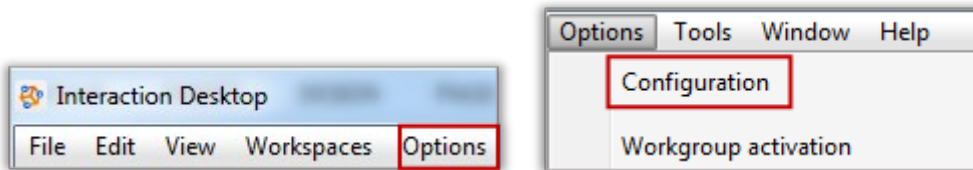


[Back to Top](#)

How to Record Your Name for Voicemail

Note: This procedure is optional for the MSR.

1. Click **Options**, then **Configuration**.

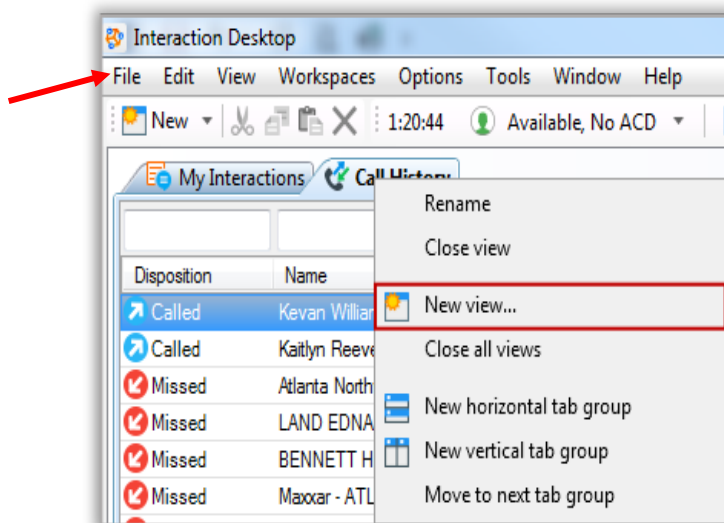


2. Click **Personal Prompts**.
3. Click **Record Name**. Follow the verbal instructions for recording your name.
4. Click **Preview** to preview the recording.
5. Click on **Apply** button.

How to Access Voicemail

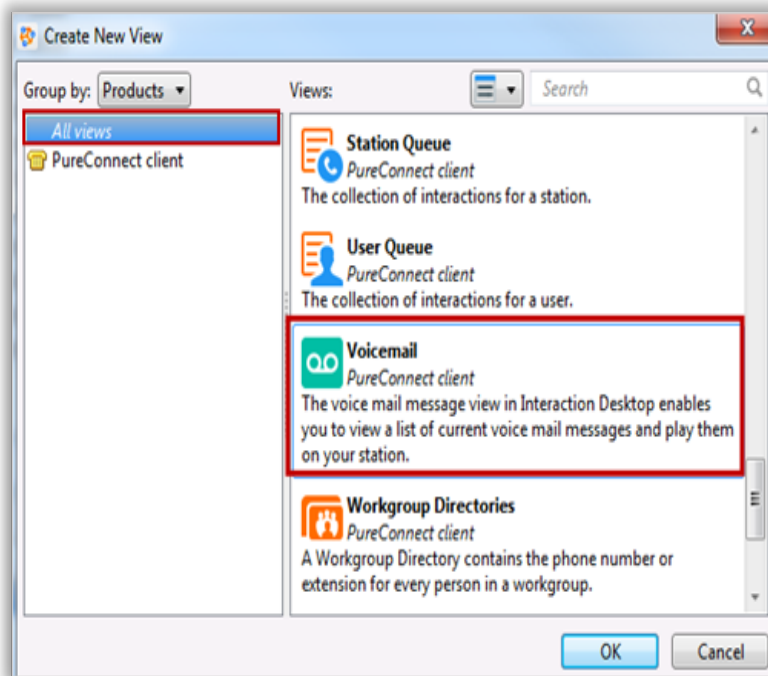
All employees also receive and can listen to voicemails via Outlook.

1. Navigate to the “**File**” button in the top left hand corner of the **Interaction Desktop** screen.
2. Click “**New** and then **View**.”





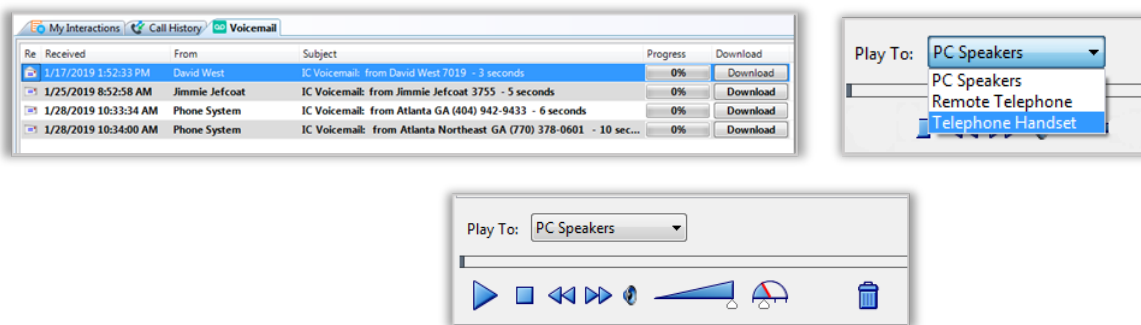
3. Click **All Views**, select **Voicemail**, then click **OK**.



The **Voicemail** tab now appears.

4. To play a **Voicemail**, select it and click the **Play To** dropdown menu.

5. Select **Telephone Handset** if working in the office or **PC Speakers** if working remotely.



6. Click the blue **Play** button to listen to the **Voicemail** message.

[Back to Top](#)

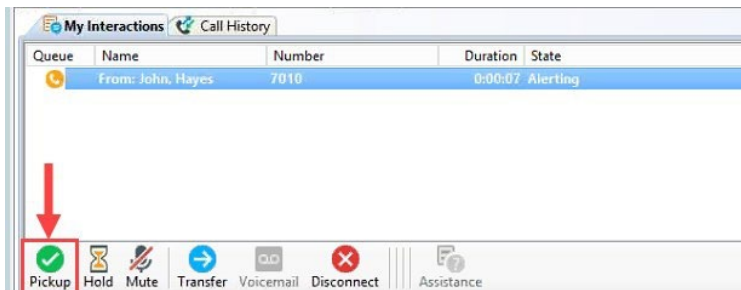
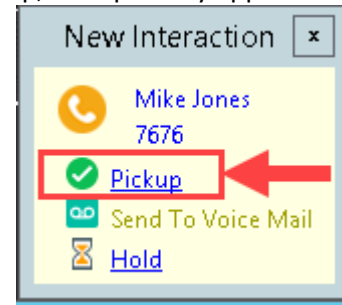
How to Answer Incoming Calls

Interaction Desktop can notify you of incoming calls by:

- Ringing your telephone (in office)
- Triggering a ring tone through computer speakers (remote)
- Triggering the **New Interaction** “toast” to pop up on the computer desktop, on top of any applications you are working in. (office or remote)

To pick up a call, you can:

- Pick up your telephone handset (office).
- Click the **Pickup** button on the call control **Toolbar**. (office or remote).
- Click the **Pickup** hyperlink on the toast popup (office or remote).



When you have completed the call, it will be disconnected if:

- The other party hangs up
- You hang up
- You press the **Disconnect** button on the **Call Control** toolbar



Once a call is ended, the call state will change from **Connected** to **Disconnected**. Once disconnected, a call will remain on your **My Interactions** tab for two minutes. It will then disappear and move to the **Call History** tab. Before it disappears, it is possible to redial the number by simply double-clicking on the disconnected call.

[Back to Top](#)

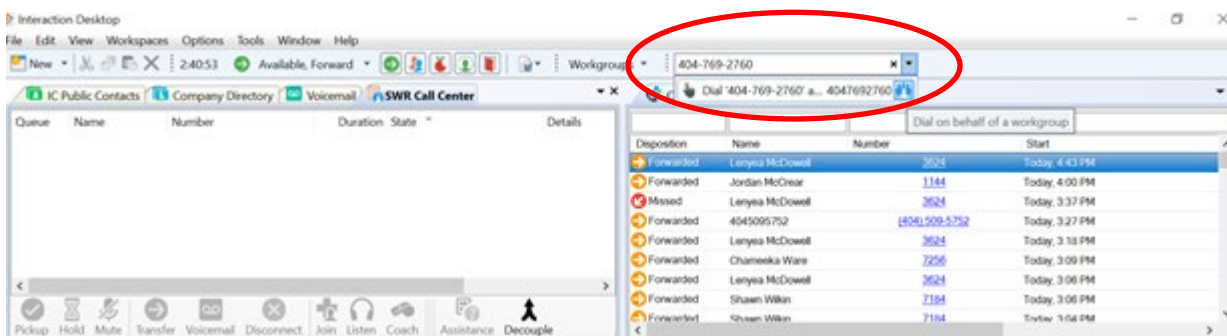
How to Make Manual Callbacks on Behalf of a Workgroup

To ensure ALL of your calls will be counted toward the daily queue totals, and your personal numbers, follow the process below:

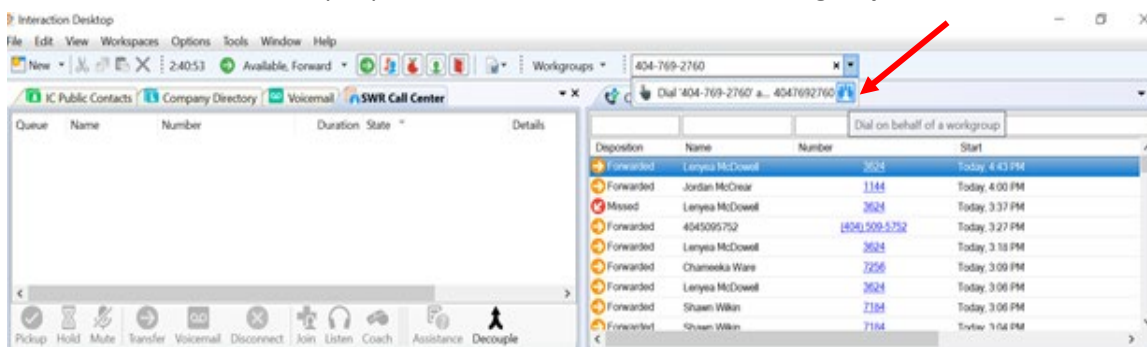
1. When you are ready to place the **Callback**, change your status to **Manual Callback**.

Note: Those whose status is **Manual Callback** and are not on the phones, will have their **Status** changed back to **Available**.

2. Enter the best call-back number in the space provided at the top of the **Interaction Desktop** screen.

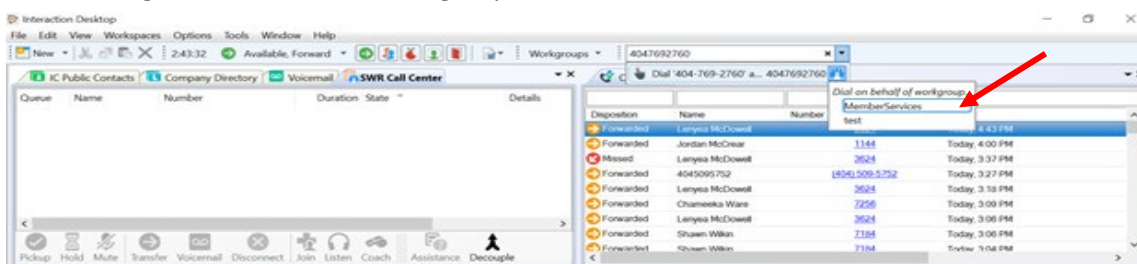


3. Click the blue icon with 3 people on it to “Dial on behalf of a Workgroup.”



4. Select “**Member Services**” from the drop-down menu.

After selecting **Member Services** workgroup, the call will dial out.

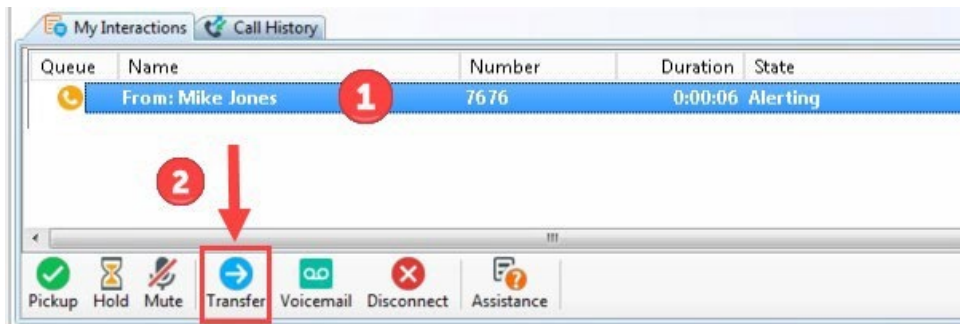


[Back to Top](#)

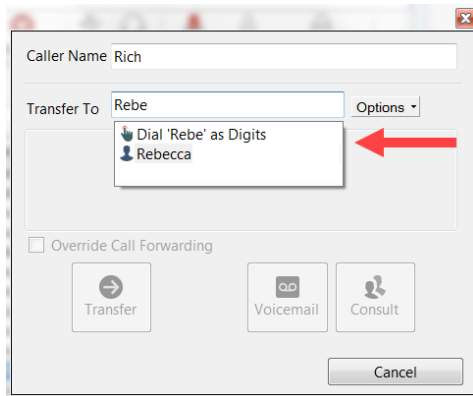
How to Warm Transfer a Call

You can select a **Consult Transfer** to forward a member call to another internal user. Typically, this happens when a member calls from an external location, and after speaking with them, you realize they need to speak with a different internal user. Rather than **Blind Transfer** the call, you can **Warm Transfer** with the other person first to let them know the call is coming.

1. Select the call you want to transfer in the **My Interactions** tab.
2. Click the **Transfer** button.

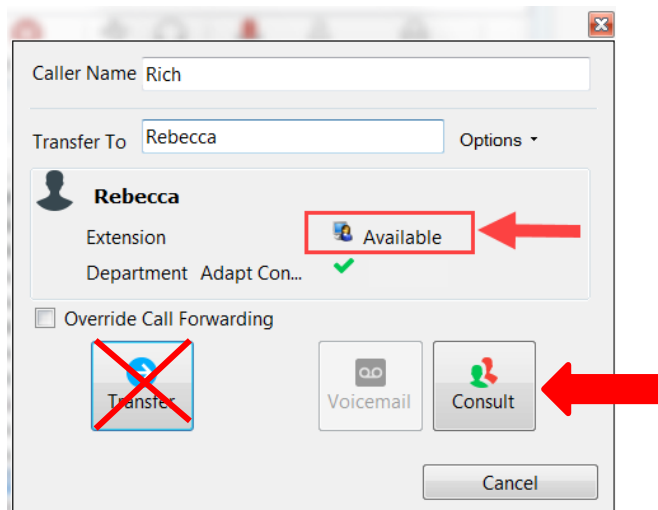


3. In the **Transfer Dialog** box, type in **Transfer To** name and select the correct name from the autolist that pops up.



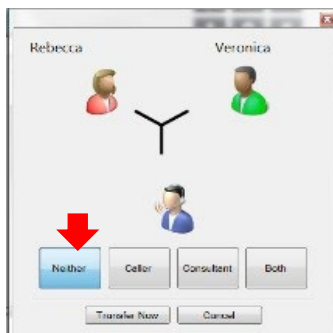
4. On the next screen you will see the **Transfer To** name and **Status**. Click the **Consult** button.
Result: The **Consult Call** screen will appear.

Note: If you select **Transfer** on this screen, it will **Blind Transfer** the call.

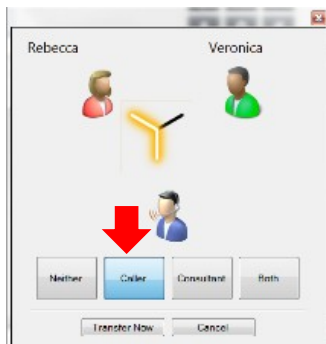


The buttons **Neither**, **Caller**, **Consultant**, and **Both** can be used to manage who you are speaking with at any point.

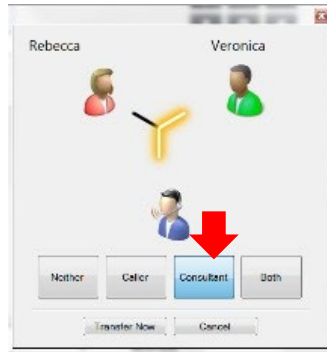
5. Select **Neither** button to put all parties on hold while another call is placed to **Consult**.



6. Select **Caller** button to speak to a caller while placing other calls to **Consult**.



7. Select **Consultant** button to speak to the consultant again without hanging up.

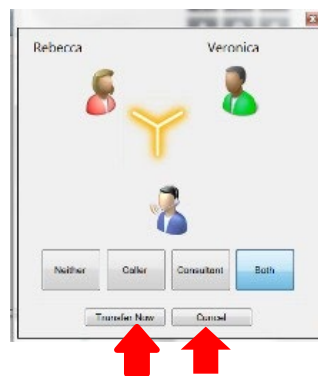


8. Select **Both** buttons to have a three-way conversation.



9. Click **Transfer Now** button to complete the consulting call and make the transfer.

10. Click **Cancel** to stop the transfer.



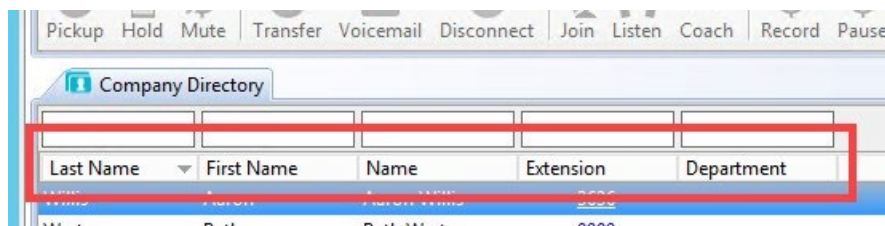
Note: **Cancel** will hang up on the caller you are consulting with and return you to the original caller.

[Back to Top](#)

How to Use Employee Directory

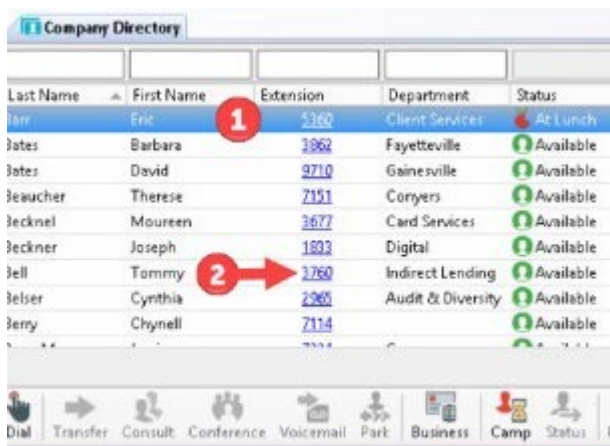
Look Up an Employee

1. Click a column heading to sort the Company Directory in ascending or descending order.



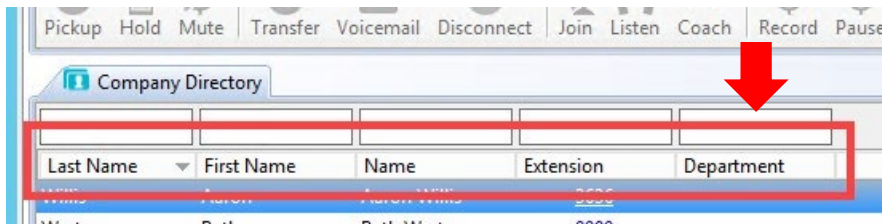
2. Scroll down to find the internal name and phone number you are searching for.

Note: The fields are searchable. You can locate a party by typing in the last name, first name, or extension.



Look Up a Department

1. Click the blank field above the **Department** column header.
2. Type a **Department** name in the blank field and select **Search**.
This **Search** should return a list of all close **Department** names.



3. Click on the **Department** name you are searching for in the displayed list.
Scroll down to find the internal name and phone number you are searching for.



Appendix

Understanding Telephone Aux Status

TELEPHONE AUX STATUS

This document attempts to clarify each Aux Status and the proper way it should be used. Most are common sense, but here are the clarifications:

Available: You will receive queue calls. We expect you to be available to take calls as soon as you are on the clock. So, if your arrival time is 9:30, then you should be in your seat ready to take calls at 9:30. This applies for lunch and break times as well. For example, when you return from lunch, we shouldn't see you immediately code to for restroom or ACW.

After Call Work – Fraud: You are working on a fraud case.

After Call Work – Paperwork: You are sending an email/ doing paperwork on behalf of the member. You should not be in this status longer than 5 mins.

After Call Work – Wire: You are a wire representative and are imputing a wire.

After Call Work – With Support: A member of support is helping you, or you have been approved for a 5min+ ACW time

At a Training Session: You are in a training class or completing cornerstone courses.

At Lunch: You are on your 30 min lunch. Please return from lunch on time or you may be subject to disciplinary actions.

Away from desk: Only the Onboarding group are permitted to use this status. MSR's should never code away from desk without approval.

Break: You are on your 10 minute break. Breaks should not go over 10 minutes. Please return on time or you may be subject to disciplinary actions.

In a Meeting: You are in a meeting. This could be a 1:1, a skip level, HR, etc.

Manual Callback: You are completing a manual Outbound Call. If you select this status, you should be on the phone, not doing paperwork. I've noticed that some of you will spend 2-5 minutes in Manual Callback before making the call (or not make a call at all).

Restroom: You are using the restroom. You are not upstairs getting snacks or coffee, please do that on your break. Any violations can be subject to disciplinary actions.

Out of Office: You have gone home for the day. Please do not forget to change your status to this at the end of each day.

Please let me know if you have any questions regarding Aux Status.

Thank you,

Signature: _____

Date: _____

[Back to Top](#)