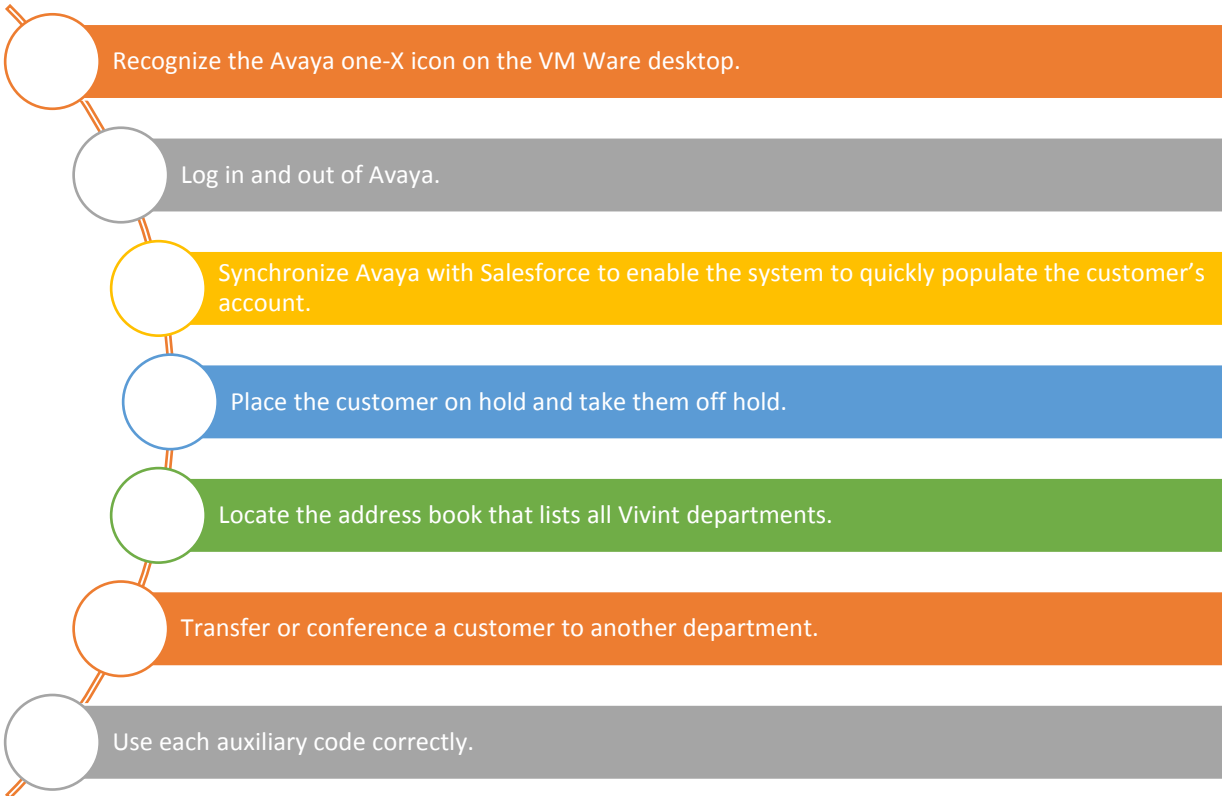


Overview: Avaya one-X® Agent is a desktop application built specifically to meet the needs of contact center Customer Care Specialists. Avaya one-X gives contact centers the tools to be more productive, whether they're working in a headquarters location or home office. Avaya One X is used to receive, make, conference or transfer calls and so much more!

Objectives: This one hour training course includes introducing Customer Care Specialists to Avaya One-X. During this session, successful participants will be able to:

- 
- Recognize the Avaya one-X icon on the VM Ware desktop.
 - Log in and out of Avaya.
 - Synchronize Avaya with Salesforce to enable the system to quickly populate the customer's account.
 - Place the customer on hold and take them off hold.
 - Locate the address book that lists all Vivint departments.
 - Transfer or conference a customer to another department.
 - Use each auxiliary code correctly.

Training Length: 1 hour

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Introduction: StatesideBPO Customer Care Specialists use Avaya as their primary phone system. Avaya is accessed from the VMware desktop via an icon. Use Avaya to make, receive, conference and transfer calls.

Logging into Avaya- This guide begins by outlining the instructions on logging into Avaya and synchronizing Salesforce.

- **Step 1:** Click the Avaya icon on the VMware desktop. Avaya cannot be accessed outside the VMware desktop.



- **Step 2:** A welcome screen appears, click "OK". Do not select Change Login Settings.



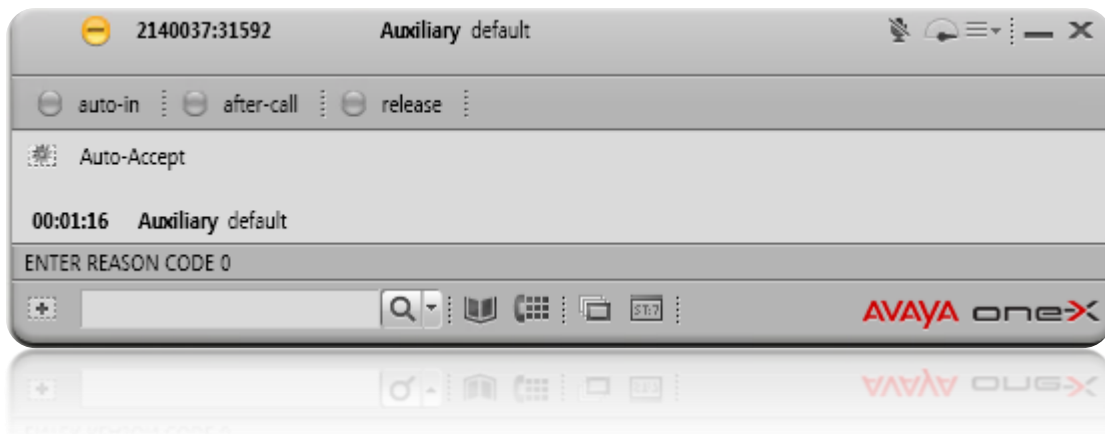
- **Step 3:** The log in screen appears. Input the 7-digit extension in both fields. Click **Log in** to proceed forward.



- **Step 4:** Next, enter the 5-digit agent ID (Avaya ID). These are the same for the username and the password. Click Log in to proceed.

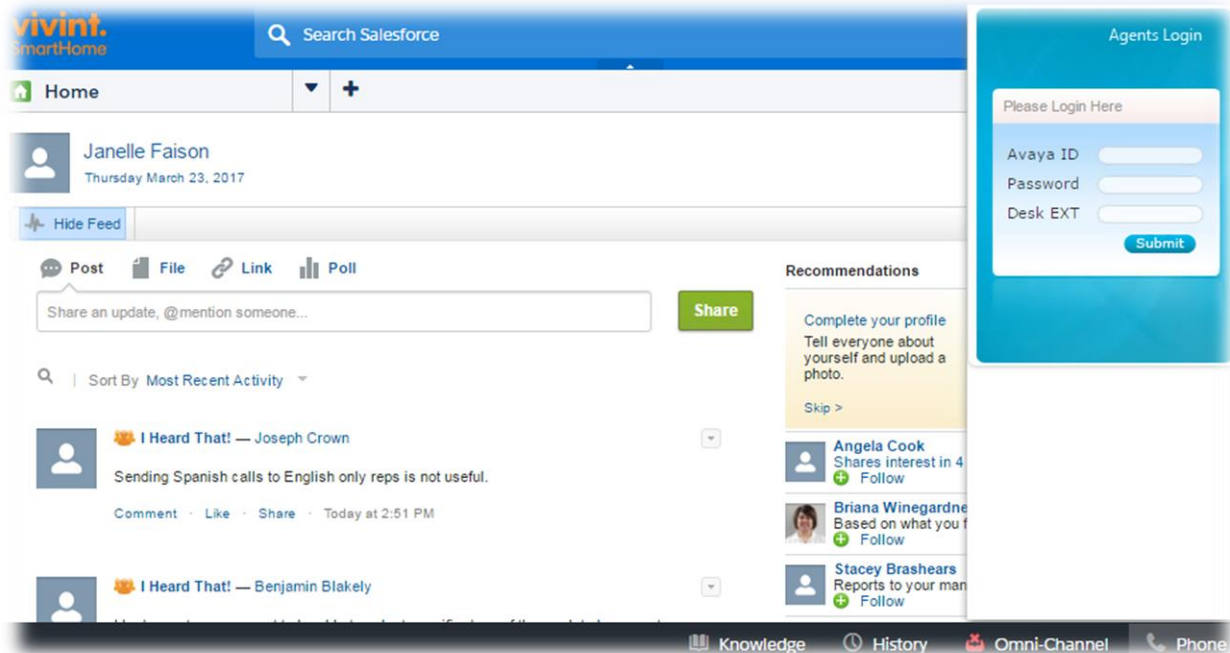


After logging into Avaya successfully, the Customer Care Specialists hears two brief beeps in their headset. Additionally, Avaya appears as shown below:



Upon logging into Avaya, the system automatically places the Customer Care Specialist into Auxiliary code default and the small circle in the upper left corner appears in yellow. Yellow indicates an auxiliary code and the Customer Care Specialist does not receive inbound calls while in an auxiliary code. Notice the countdown in the lower left corner.

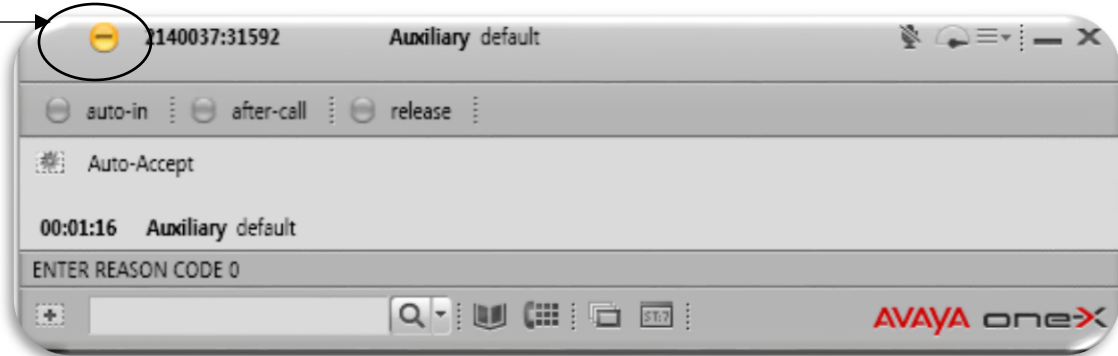
- **Step 5:** After logging into VMware and Salesforce, click the Phone icon in the lower right corner. The following displays:



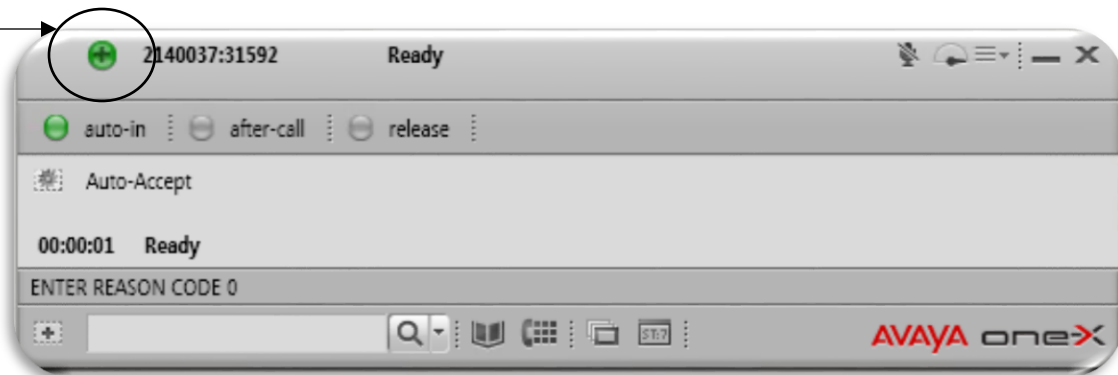
In the right side, complete the three fields as follows:

- **Avaya ID** = Five-digit Agent ID (i.e. 315XX)
 - **Password** = Seven-digit extension (i.e. 2140XXX)
 - **Desk Ext** = Same seven-digit extension (i.e. 2140XXX)
- **Step 6:** Select **Submit** to complete the sync.
 - **Step 7:** Return to Avaya and click the down arrow next to the status icon and change the status to ready (green).

The yellow circle means calls will not come through.



Hover over the circle, click the drop-down arrow, change the status to ready.

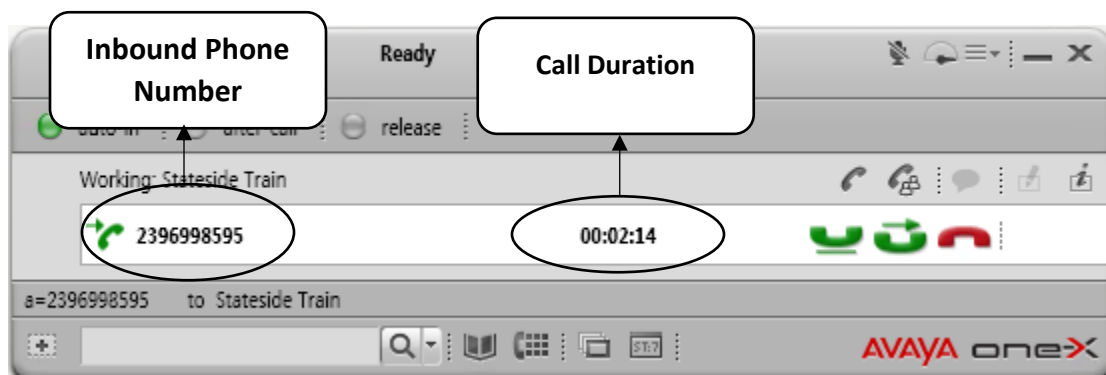


Now, Avaya and Salesforce are in sync. The inbound calls start to come through Avaya. It is essential to sync Avaya and Salesforce to reduce handle time.

Answering Calls

As new inbound calls come in, the customer is connected to the next available Customer Care Specialist. Avaya is set to auto-answer. This means that the Customer Care Specialist does not need to press a button using Avaya to accept the call. The customer is live on the phone and can hear. Once the customer is live, relay the greeting as normal and proceed with handling their request/inquiry.

When a new inbound call comes through, two functions occur. First Avaya populates with their inbound telephone number as shown below:

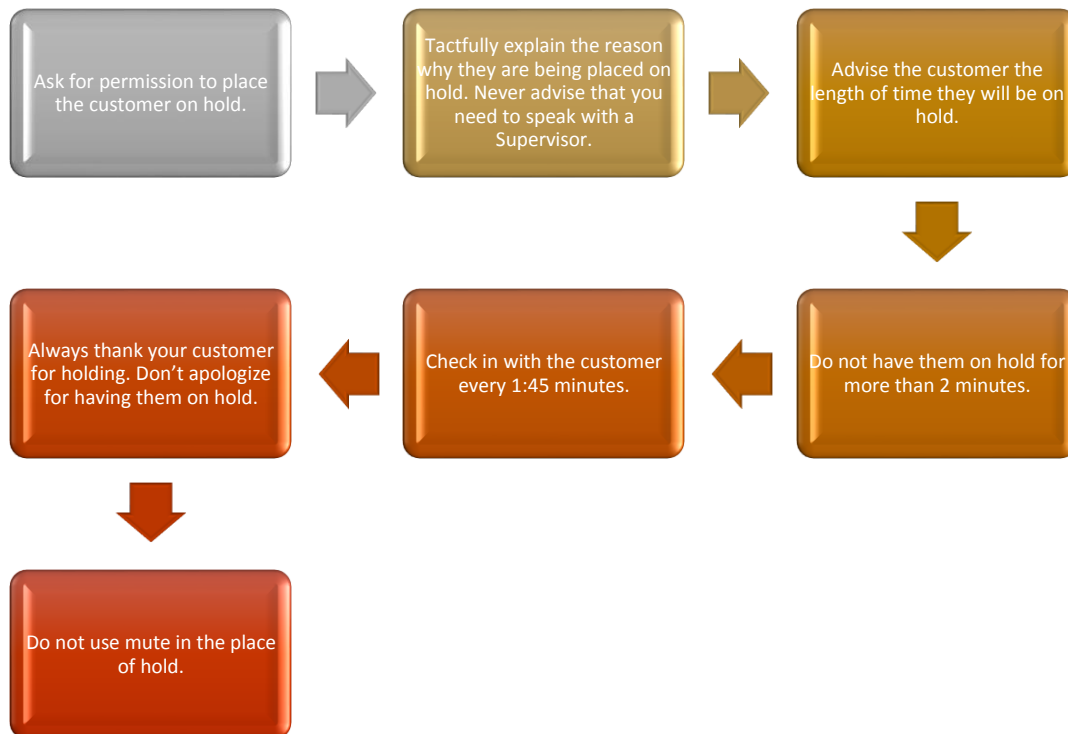


Second, the customer's account populates in Salesforce. This feature helps the Customer Care Specialist save time on their call. As long as the phone number the customer calls from matches the number on the account.

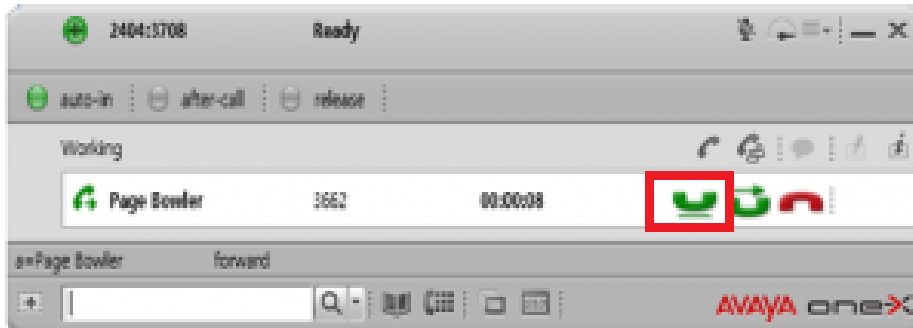
The screenshot displays the Salesforce CRM interface for a Vivint SmartHome account. The top navigation bar includes the Vivint logo, a search bar, and user profile icons. The main content area is divided into several sections: Customer Health Score, Customer Account (JA-5276956), Service Information, Passcodes, and Account Status. The Service Information section shows details like Service Number (4747733), Service Type (Security Service), Account Type (Residential), Panel Type (SkyControl), and Installation Date. The Account Status section shows Billing Status (green checkmark) and Service Status (Never Installed). A sidebar on the left offers options like 'Create A Case', 'Post', 'Customer Feedback', 'Create a Case', and 'Visit Result'. A 'Call Log' window is open on the right, showing call details such as Caller ID (2396998595), Dialed Number (81136), and Queue (89901).

If the account does not populate, search for the account using standard procedures.

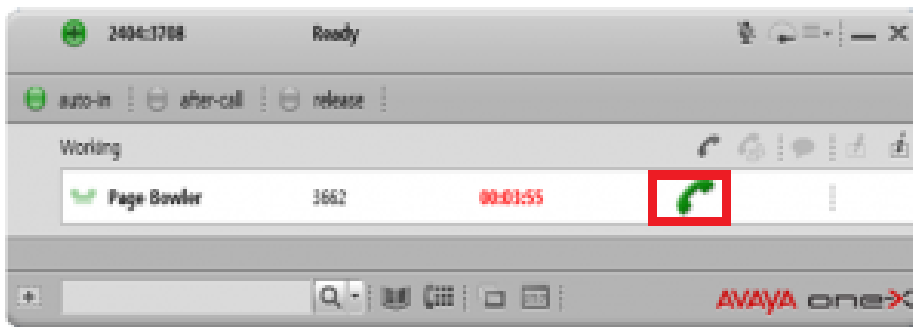
Hold - Use the following process to place a customer on hold:



Step 1: To place the line on hold, click the green phone with the line underneath it (farthest one to the left).

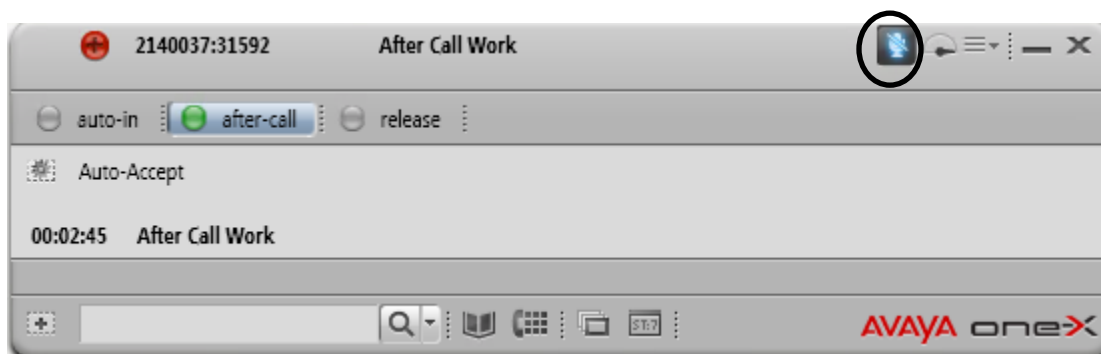


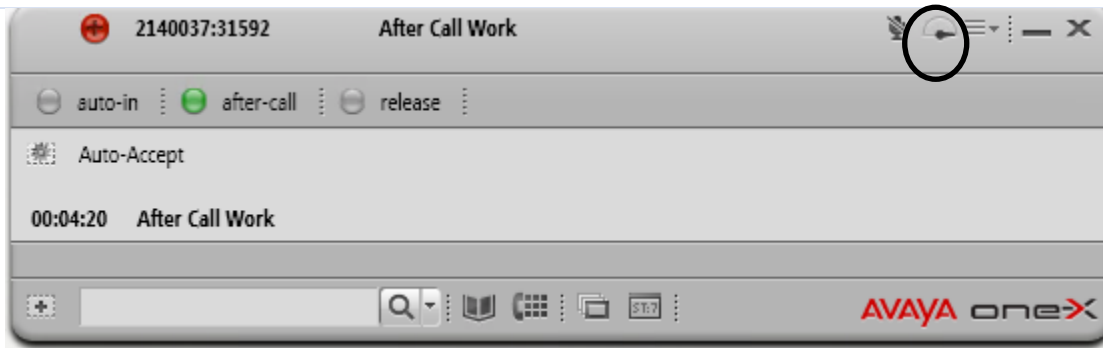
Step 2: The time changes to red and only one phone displays on the screen.



Step 3: While customers are on hold, there is hold music and advertisements playing.

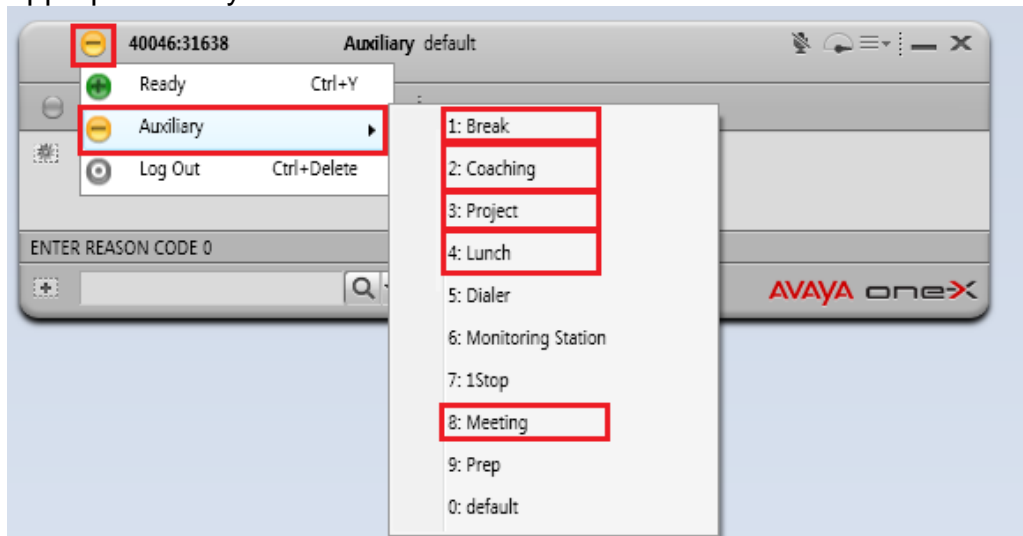
Mute – Be professional by using the mute button to cough or sneeze. The Microphone icon in the upper right corner is the mute button. Upon pressing this button the customer hears silence so do not use this in the place of hold. Do not use Mute to research information in Merlin, Knowledge or seek guidance from a Supervisor in Spark. The customer may believe that the call was disconnected due to the silence.





Auxiliary Codes -

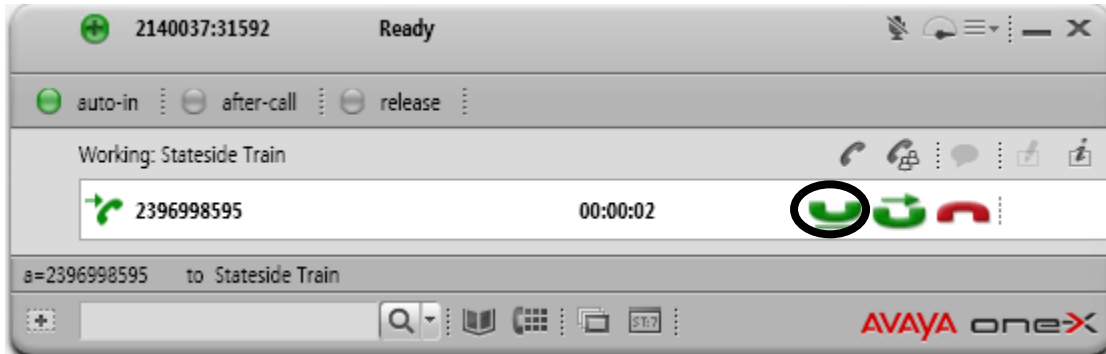
- To change the auxiliary codes, click on the colored circle on the top left. A drop down appears, click auxiliary.
- After the second drop down appears, select the correct auxiliary that is appropriate for your schedule.



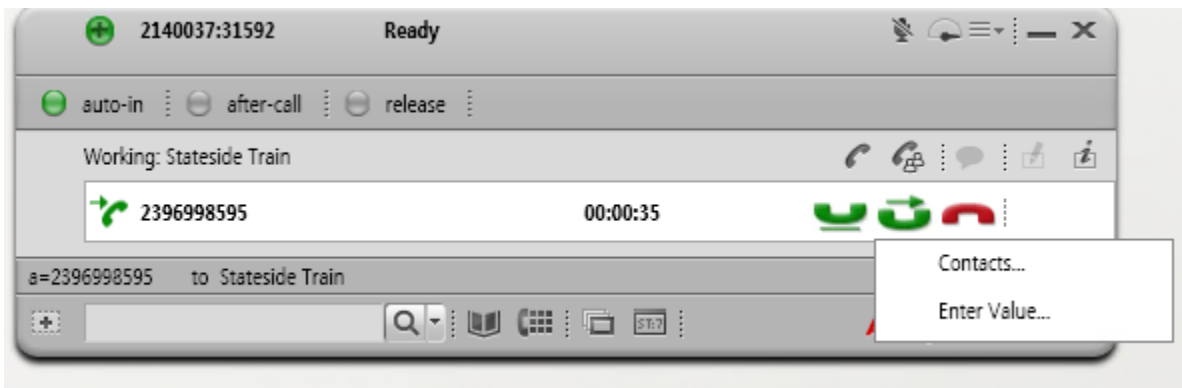
- Only use codes 1,2,3,4 and 8. Authorized auxiliary codes maybe changed during a call.
 - 1: Break = 15-minute break per schedule.
 - 2: Coaching = One-on-one session with your Supervisor.
 - 3: Project = Special assignments made by a Supervisor or Manager.
 - 4: Lunch = 30-minute lunch per schedule.
 - 8: Meeting = Scheduled meetings such as huddles, team meetings, or training.
 - 9: Prep = Use only at the end of the shift when it is time to log out for the day.
- DO NOT use 5, 6, 7 or 0. Choosing an unauthorized auxiliary code can be perceived as call avoidance and will be subject to disciplinary action.

[Calling A Supervisor](#) - If QRF is unavailable, use these steps to contact a supervisor:

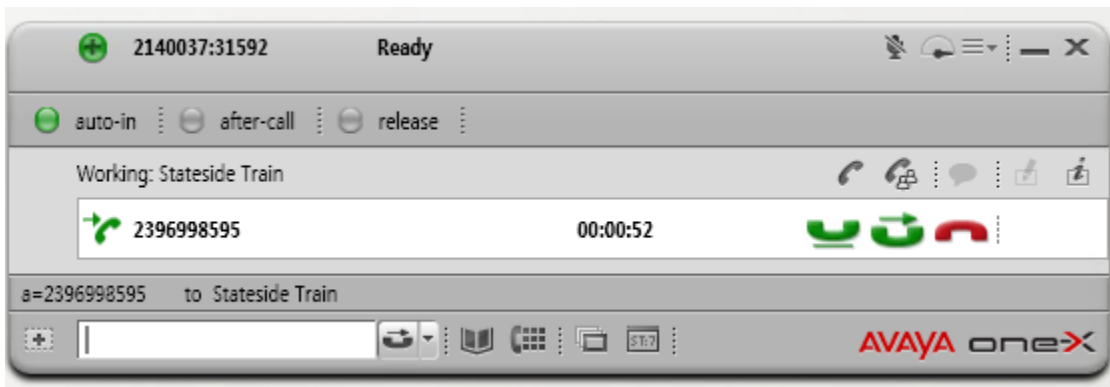
1. Click the phone icon with the green arrow.



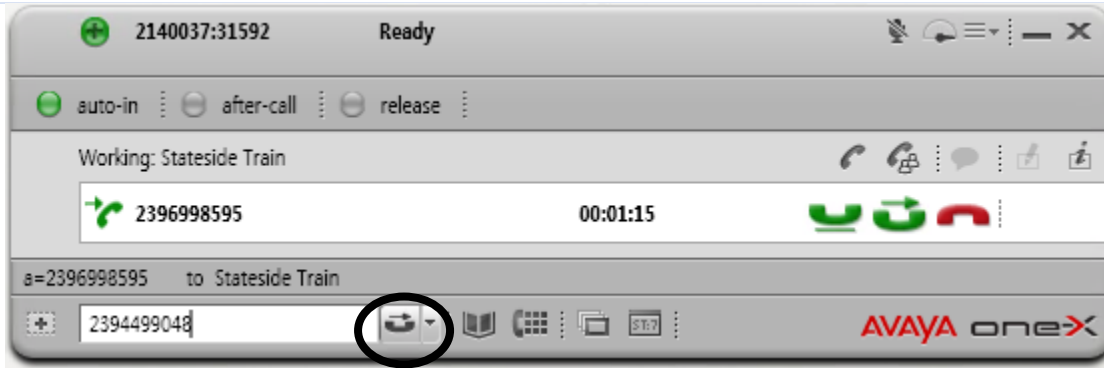
The following two options appear:



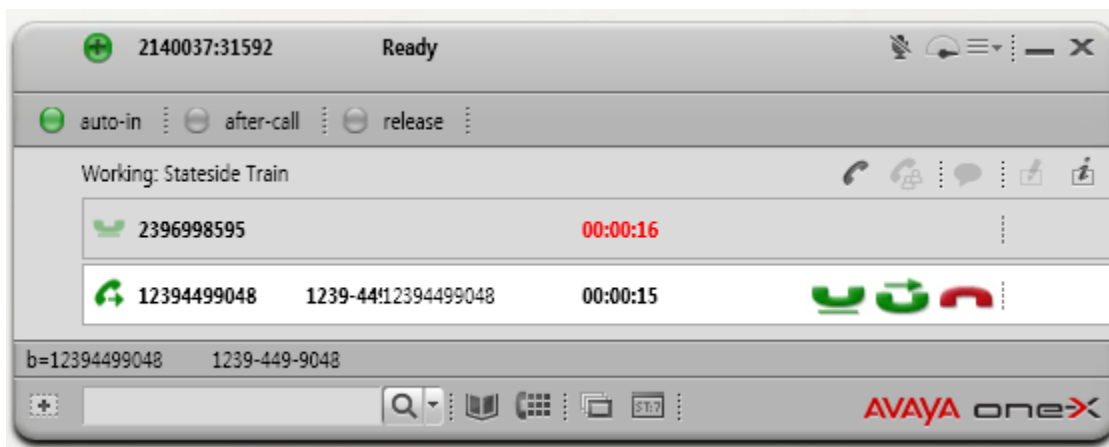
The cursor moves to the lower left corner in the search field.



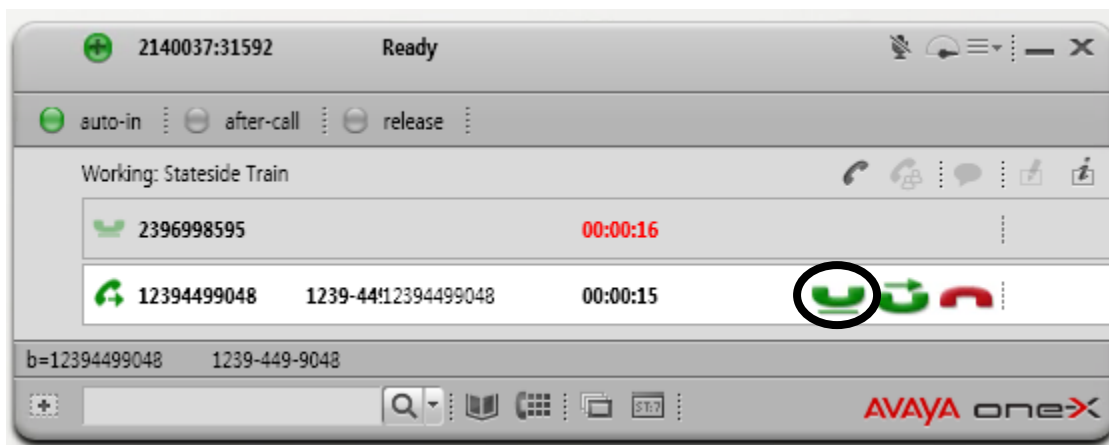
2. Input the telephone number (omit the 9 + 1), as shown below and click the transfer button next to the search field.



A second line opens as shown below:

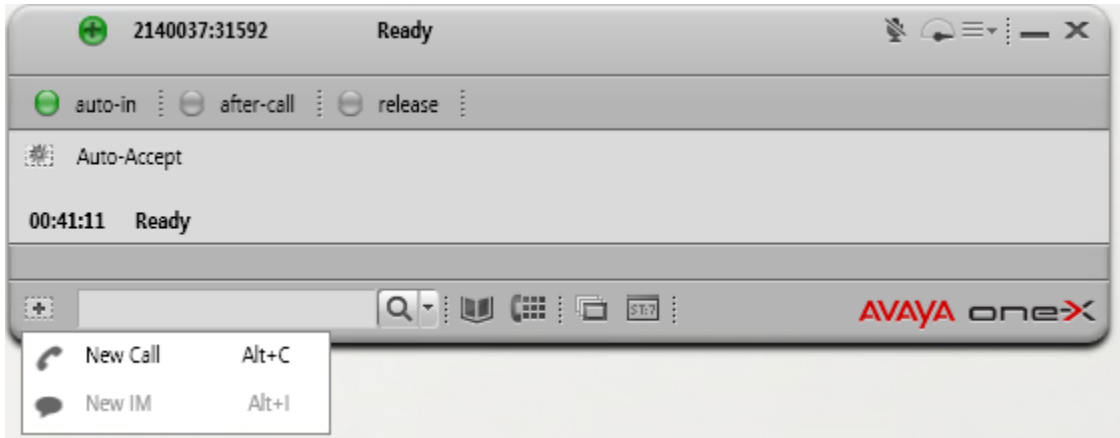


3. Click the **Transfer** button with the green arrow.

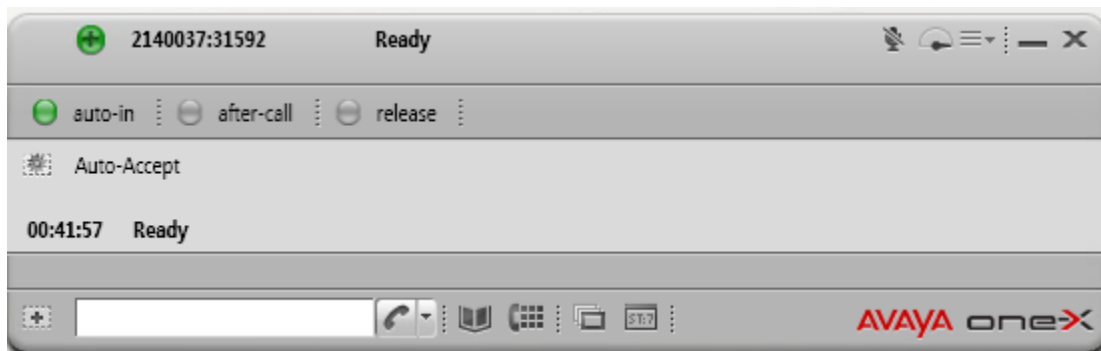


Outbound calls - Making an outbound call without having a customer on the line requires the steps below:

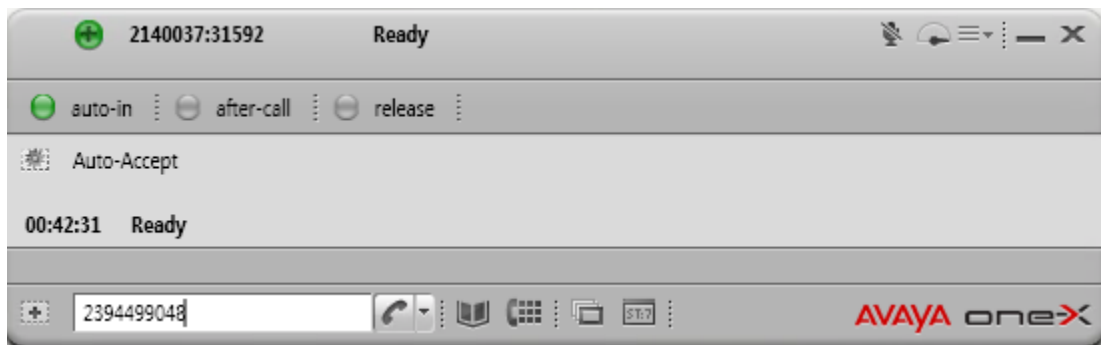
1. Click the + symbol in the lower left corner. The following appears display:



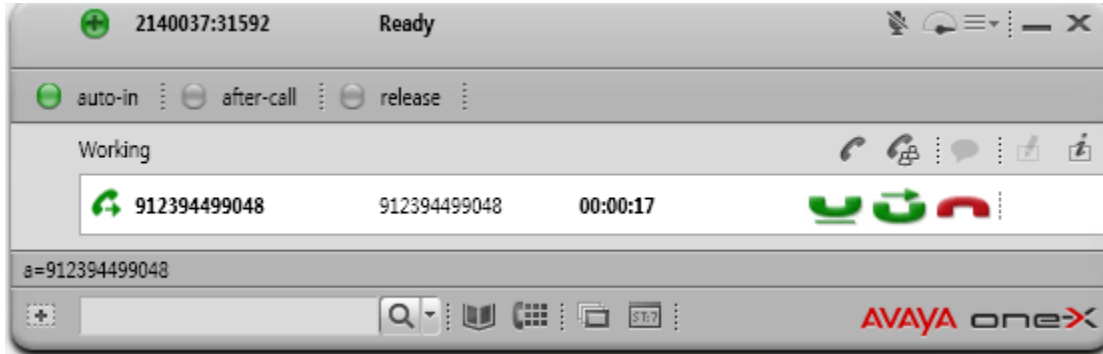
2. Select **New Call**. The cursor appears in the search field:



3. Type in the telephone number (omitting the (9 +1)).

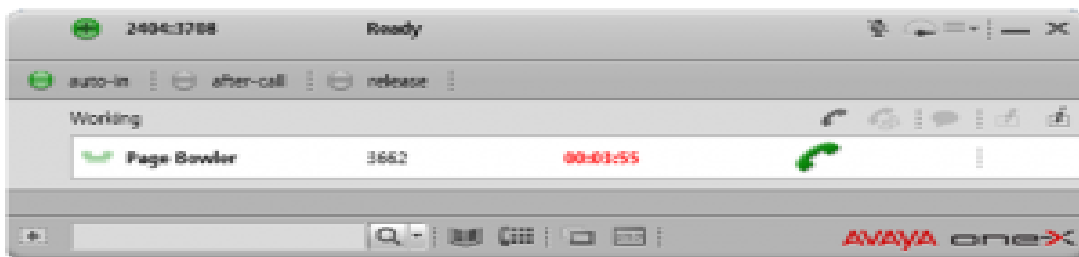


4. Click the small telephone icon:

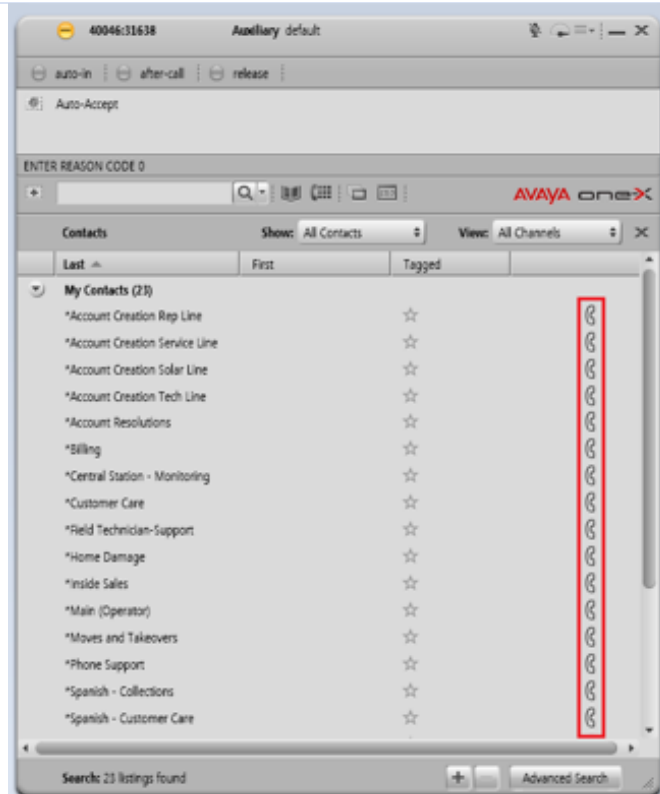


Conference/Transfer:

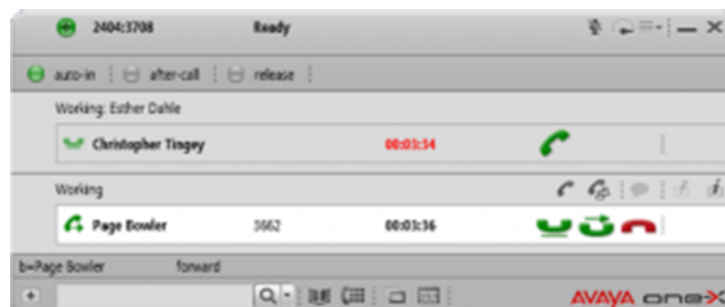
1. Ask the customer for their permission to be placed on hold. Wait for the customer to respond.



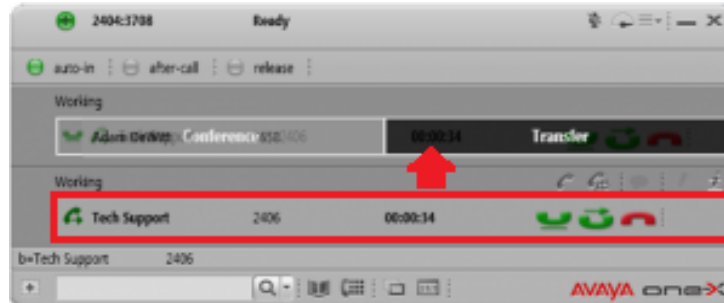
2. To call a different department, click the phone book and scroll through the drop down.



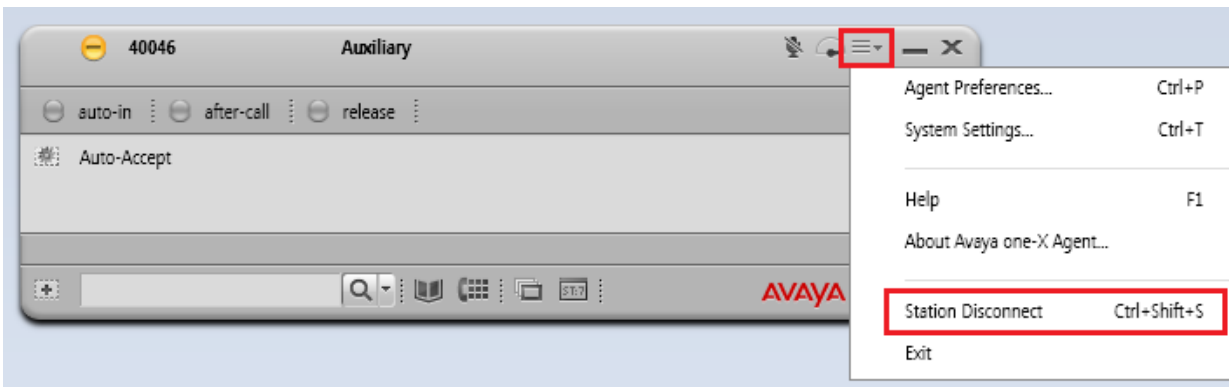
- To call, click the phone next to the name on the right-hand side.
- You can also search the department name in the search bar, but do NOT hit enter. Do not transfer calls to Account Maintenance, Business National Account, Online Account Center, Panel, Sensors, Takeover Module/GE Translators or Tech Support Troubleshooting. All reps are trained to handle these calls types. Only transfer to Billing as outlined in the Billing Knowledge Article.
- Two options appear labeled 'conference' and 'transfer'. Drag the second line up toward the first line.



6. You have to be on the line with the one you are dragging in order for the transfer to work.



Logging Out of Avaya:



- **Step 1:** Choose the auxiliary code “Prep”.
- **Step 2:** Click on the three lines located on the top right corner of Avaya. A drop down appears, click on station disconnect.
- **Step 3:** Click the three lines and choose Exit from the list. Important: Never simply click the “X” in the top right hand corner without first logging out.

Key Learnings

Avaya is a phone system installed on the VMware desktop. It cannot be accessed on a personal computer. Synchronizing Avaya with Salesforce populates the customer’s account information. This saves time from having to search for their account. Remind logged into Avaya during the entire shift. Change auxiliary statuses as it relates to the shift.

Logging out of Avaya is a three-step process. First change the auxiliary status to Prep, then choose station disconnect and then click Exit.

Review

1. What are the steps to log into Avaya?
2. What are the steps to sync Salesforce and Avaya?
3. Outline the steps to use Avaya to place the customer on hold.
4. Provide an example of when to place the customer on hold versus mute.
5. Outline the steps to conference the customer with Customer Loyalty.
6. What are the steps to log out of Avaya?