



# **Using Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud**

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# Chapter 1: Introduction

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## Purpose

This document describes how to use Avaya Workspaces for CRM to manage digital and voice interactions on Avaya Experience Platform™ Public Cloud. This external customer document is intended for contact center agents and supervisors.

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## Change history





Issue	Date	Summary of changes
34	February 28, 2025	Added note about withdrawal of X (Twitter) messaging integration support at: <ul style="list-style-type: none"><li>• <a href="#">Interactions</a> on page 11</li><li>• <a href="#">Accepting digital interactions</a> on page 28</li></ul>
33	January 22, 2025	Minor updates throughout the document.
32	January 14, 2025	Minor updates for 3.2.1 closure.
31	November 5, 2024	Added information about support for six-way conference at <a href="#">Adding other agents to an interaction</a> on page 52.

# Chapter 2: Navigation

## Interaction icon descriptions

### Channels

After you accept an interaction, you can view the following options in the interaction area:

Icon	Name	Description
	Voice	Displays voice interactions.
	Chat	Displays chat messages. This navigation icon is available when a chat interaction card is in focus.
	Email	Displays customer emails.
	Chat and Messaging	<p>Displays text messaging interactions. This navigation icon is available when a messaging interaction card is in focus.</p> <p>Agents can send text messages and images with the <b>Reply</b>, <b>Postback</b>, and <b>Link</b> buttons.</p> <p>The following types of rich interactive messages are supported:</p> <ul style="list-style-type: none"> <li>• Text messages and emojis</li> <li>• Attachments and images</li> <li>• Location messages (location request from agent, shared location from customer)</li> </ul> <p>The following file attachment types are supported:</p> <p>.aac, .3g2, .3gp, .7z, .aac, .amr, .avi, .bmp, .csv, .doc, .docx, .eml, .gif, .heic, .ics, .jfif, .jpeg, .jpg, .key, .log, .m4a, .m4v, .mov, .mp3, .mp4, .mp4a, .mpeg, .mpg, .mpga, .neon, .numbers, .odt, .oga, .ogg, .ogv, .pages, .pdf, .png, .pps, .ppt, .pptx, .qt, .svg, .tif, .tiff, .txt, .vcf, .wav, .webm, .webp, .wmv, .xls, .xlsx, .xml, .yaml, .yaml</p> <p>Agents receive replies as standard text messages.</p>














## Top bar and general menu options

Icon	Name	Description
< >	Collapse/Expand	Enables you to hide or view your active channels and manage your agent state.  If you are active on several channels, you can see each channel icon, such as chat, voice, and messaging.
🔍	Search	Enables you to search for users.  You can open the dialpad to dial the phone number to call.
🔔	Notifications	Displays notifications. You can click <b>Clear All</b> to clear your notifications.
🕒	History	Provides a link to history of calls or reports in the original browser window. The exact functionality depends on the CRM you are using.
⚙️	Settings	Displays a window to manage the following settings: <ul style="list-style-type: none"> <li>• Logs: Manage logging settings for troubleshooting purposes and download logs.</li> <li>• Device Settings: Manage audio settings. Select your microphone and speakers.</li> <li>• User Preferences: Manage notification preferences.</li> <li>• About: View software version information.</li> </ul>
✉️	Deferred Emails	Displays deferred emails, if applicable.
👤	List of Agents	For supervisors only: Enables you to view and manage the agents on your team. By default, you only see active, on-shift agents, but you can use the filter to view all agents on your team.
📄	Pop-out	Displays Avaya Workspaces for CRM in a separate browser window that you can resize as required.










## Icons available during interactions

Icon	Name	Description
✓	Accept Digital Interactions	Accepts a digital interaction.
📞	Accept Voice Interactions	Accepts a voice interaction.
🔄	Last Dialed Number	Redials the last number you called.
⏸️	Hold	Pauses the current voice interaction.  When an active voice interaction is on hold, the color of the interaction card changes to blue.

*Table continues...*

Icon	Name	Description
	Unhold	Resumes the voice interaction. When an interaction on hold becomes active, the color of the interaction card changes to green.
	DTMF keypad	Displays a keypad where you can enter Dual Tone Multi-Frequency (DTMF) digits during a call. The DTMF option is intended for Interactive Voice Response (IVR) calls and voicemail.
	Transfer	Transfers an active interaction. When you click  the following options become available: <ul style="list-style-type: none"> <li>If you are on a voice interaction, Avaya Workspaces displays a list of options that enable you to transfer the interaction to a Service, a contact in your directory, or another telephone number. To transfer to another telephone number, in the <b>Enter a number</b> field, type the number to transfer the voice interaction and click .</li> <li>If you are on a digital interaction, Avaya Workspaces displays a list of options that enable you to transfer the interaction to a Service or a contact in your directory.</li> </ul>
	End	Ends the current voice interaction.
	More	Provides more options for the interaction. For example, you can view more information about the interaction and disposition codes.
	Emoji	Enables you to select and send an emoji.
	Attach	Enables you to attach files during a digital interaction. After you click  , do one of the following options: <ul style="list-style-type: none"> <li>To send a file, click <b>File</b>.</li> <li>To send a video, click <b>Video Recording</b>.</li> <li>To send an audio recording, click <b>Audio Recording</b>.</li> <li>This feature is available for the Avaya Experience Platform™ Public Cloud voice channel.</li> </ul>
	Templates	Displays the list of templates you can use to reply to customer interactions.
	Send	Sends messages in a chat, email, or messaging interaction.
	Reply	Sends a reply to the original sender of the email.

*Table continues...*

Icon	Name	Description
	Reply All	Sends a reply to all the recipients of the original email.
	Forward	Forwards an email to another user.
	Discard	Discards an email.
	End	Ends a digital interaction.
	After Contact Work	Indicates that the agent has entered the After Contact Work state.
	Customer Journey	<p>Provides a graphical representation of the end-to-end journey of the customer in the following sections:</p> <ul style="list-style-type: none"> <li>• Filter: Filters data based on channels.</li> <li>• Graph: Consists of top and middle timelines. The top timeline displays contact center interaction data for the customer. The middle timeline displays a zoomed view of the top timeline.</li> <li>• Journey Details: Displays the details of an interaction that is present in the middle timeline.</li> </ul> <p>The widget also provides transcripts for the interaction. For email and messaging interactions, the transcript displays a link where you can view previous attachments.</p>
	Observe	Agents can view the name of the supervisor who is observing the interaction.
	Coach	<p>Agents can view the name of the supervisor who is coaching the interaction.</p> <p>For voice interactions, the agent can view the supervisor name along with the phone number.</p>
	Barge In	Agents can view the name of the supervisor who has barged into the interaction.

---

## Terminology

### Interactions

Interactions are requests for help from customers. They can also consist of customer queries or sales inquiries. Customers can request help by:

- Email: Sending an email containing their query.
- Chat: Initiating a chat session on the web.

- Social media messaging: Sending a message through social media platforms, such as Facebook, WhatsApp, or X (Twitter).

**\* Note:**

From March 1, 2025, Avaya does not support messaging integration with X (Twitter). You can no longer configure X (Twitter) social media accounts with Avaya Experience Platform™ or use X (Twitter) to send or receive messages to or from customers.

- Voice: Making a telephone call using a voice communication application.

Email, chat, and messaging are digital interactions. Voice calls are voice interactions.

Each of these help requests represents an interaction. As an agent, you can respond to interactions, transfer them to other agents or services, and close them. A service is a group of people with a particular skill. Examples of services include the Sales team, Finance department, or Spanish language desk.

## Dispositions

A disposition code is a label to attach to an interaction to describe or categorize it. Disposition codes are tags that help you and others summarize and flag interactions that require follow-up. For example, "Complaint", "Not interested", and "Bought another product". Disposition codes often indicate the outcome of an interaction. For example, "Product sold" or "Issue resolved". They describe the situation after the interaction. You can add disposition codes to digital and voice interactions.

### Related links

[Adding disposition codes](#) on page 47

## Contact centers

A contact center is a business division within an organization that manages customer interactions. Contact centers are also known as call centers. Contact centers use advanced technology to help resolve customer issues quickly, track customer interactions, and capture interaction and performance data.

Customer Relationship Management (CRM) is when a business or other organization administers its interactions with customers, typically using data analysis to study large amounts of information. CRM refers to all the processes and tools that manage customer relationships. Salesforce, ServiceNow, and Microsoft Dynamics® 365 are examples of CRM software.

Avaya Experience Platform™ Public Cloud uses a Contact Center as a Service (CCaaS) software deployment model that enables companies to only purchase the technology they need and a vendor usually operates it to reduce IT, integration, and support costs. Your organization uses Avaya technology to run a software application called Avaya Workspaces for CRM.

### Salesforce

Salesforce provides software to enable businesses or other organizations to administer customer interactions. Salesforce software uses special terminology to refer to aspects of customer interactions.

This guide references some of this terminology, such as cases, opportunities, and tasks. This guide also contains procedures that only apply to Salesforce software. If you use other CRM software, this terminology and these procedures do not apply. For more information about Salesforce, see <https://www.salesforce.com/>.

### **Microsoft Dynamics®365**

Microsoft provides software to enable businesses or other organizations to administer customer interactions. Microsoft Dynamics®365 helps enterprises with resource planning using CRM intelligent business applications which connect operations and supply chains for complete portfolio management. For more information about Microsoft Dynamics, see <https://dynamics.microsoft.com/>.

### **ServiceNow®**

ServiceNow provides software to enable businesses or other organizations to administer interactions with customers. ServiceNow connects all parts of an enterprise with the aim of increasing customer loyalty and improving revenue. It enables agents to respond to customer needs rapidly, proactively, and transparently. For more information on ServiceNow, see <https://www.servicenow.com/>.

## **Customer journey**

A customer journey is a visual representation of a customer's interactions. Through an interaction with a channel, you can visualize every point in the customer journey. The complete view of the customer journey across all channels can help to facilitate informed decisions in your contact center.

It provides a graphical representation of the end-to-end journey of the customer in the following sections:

- Filter: Filters data based on channels.
- Graph: Consists of top and middle timelines. The top timeline displays contact center interaction data for the customer. The middle timeline displays a zoomed view of the top timeline.
- Journey Details: Displays the details of an interaction that is present in the middle timeline.

The Customer Journey feature also provides interaction transcripts. For email and messaging interactions, the transcript displays a link where you can view previous attachments.

### **Related links**

[Viewing customer journey information](#) on page 50

## **Templates**

An account administrator can create response templates for you to use when handling digital interactions with customers. Templates can contain frequently-used text or links. With templates, you can respond to customers quickly with well-prepared and formatted text, reducing interaction time and improving customer experience.

Avaya Workspaces for CRM saves the responses you create with templates in the conversation transcript.

The following types of templates are available:


- **Email Template:** The widget contains a list of sample email text to select and add when composing an email. You can hover over the template to preview the template content. You can edit the email template text before sending it.
- **Quick Text:** The widget contains predefined messages, such as greetings and answers to common questions. The widget is available for chat, messaging, and email interactions. You can send quick text directly or edit it before sending it.
- **URL:** The widget contains a list of configured webpage links to add to chat, messaging, and email interactions.

**Related links**

[Using templates](#) on page 31

## Keyboard shortcuts

Avaya Workspaces for CRM conforms to the Voluntary Product Accessibility Template (VPAT) guidelines and provides accessibility support for low-vision and visually impaired users. The following table lists the keyboard shortcuts you can use to navigate within Avaya Workspaces for CRM:

Shortcut key	Action
Ctrl+Alt+1	Opens the agent state list.
Ctrl+Alt+2	Highlights the first user interface element on the top menu bar. The first user interface element on the top menu bar is  by default.
Ctrl+Alt+3	Highlights the first tab on the Settings window.
Up/Down	Moves up and down on a menu or a list.
Right	Expands a menu or a list. Moves right if the user is in a field.
Left/Backspace	Collapses a menu or a list. Moves left or deletes the text if the user is in a field.
Esc	Closes a menu or a list.
Tab	Highlights the next user interface element.
Shift+Tab	Highlights the previous user interface element.

Keyboard navigation is active only if you open a menu using a keyboard. The keyboard navigation is inactive if you open a menu using a mouse.

# Chapter 3: Getting started

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## Logging in to Avaya Workspaces for CRM

### About this task

You can log in to Avaya Workspaces for CRM using your Avaya Workspaces for CRM username and password. These login details are usually not the same as your CRM login details.

After logging in to Avaya Workspaces for CRM, you can activate your profile to receive customer interactions.

### \* Note:

If you open the agent dashboard in another browser or tab after you log in, the session in the original browser or tab will end.

### Before you begin

Ensure that you are logged in to your CRM.

Ensure that you configured the browser settings as recommended. For more information about the browser settings, see *Avaya Experience Platform™ Public Cloud Solution Description*.

### Procedure

1. At the bottom of the screen, click **CCaaS Workspaces for CRM**.

The product name can vary.

2. Click **Accept**.

3. Do one of the following:

- To log in to Avaya Workspaces for CRM directly, type your username and password in the **Username** and **Password** fields. Click **Sign In**.
- Click your CRM logo to log in using your username and password. Avaya Workspaces for CRM displays the single sign-on page.

4. On the Activate Agent page, select an emergency location when you log in for the first time.

5. **(Optional)** To activate your profile in Avaya Workspaces for CRM, click **Activate**.

Avaya Workspaces for CRM displays the welcome page and an interaction area with Start Work options. Avaya Workspaces for CRM recognizes that you are present but not ready to accept customer interactions. For example, you might be taking notes or compiling reports.

6. Click the Start Work option that an account administrator configured.

You can receive customer interactions when your agent state is set to Ready.

### Related links

[Selecting an emergency location](#) on page 18

---

## Starting work

### About this task

When you log in to Avaya Workspaces for CRM, you enter the state that an account administrator configured. The options are:

- Ready
- Not Ready
- Connected

Avaya Workspaces for CRM starts sending you customer interactions when you are in the Ready state. If you are in the Not Ready or Connected state after you log in, you must manually enter the Ready state to start work.

### Before you begin

- Log in to your CRM and Avaya Workspaces for CRM. Ensure that you activate your profile.
- Ensure that Avaya Workspaces for CRM does not place you in the Ready state automatically.

### Procedure

On Avaya Workspaces for CRM, do one of the following depending on the configuration:

- In the welcome area, click **Go Ready**.
- At the top of the CRM widget, click the agent toolbar and click **Go Ready**.

### Example

If your profile is enabled for chat interactions, Avaya Workspaces for CRM enables the chat channel, and you start to receive chat-based customer interactions. You can inform Avaya Workspaces for CRM that you are unavailable to accept interactions at any time by changing your state. For example, if you leave your desk or need time for other activities.

### Related links

[Getting started with Salesforce](#)

[Getting started with Microsoft Dynamics](#)

[Getting started with ServiceNow](#)

---

## Changing your state

### About this task

You can change your agent state to indicate whether you are ready to accept interactions. Set your state to Not Ready if you leave your desk or need time for other activities. When indicating that you are not ready, select a reason from the available list.

Your administrator can enable the agent state synchronization between the Avaya Workspaces for CRM and Dynamics 365 Omnichannel queues. If the synchronization is enabled, agent state changes are reflected simultaneously in both Avaya Workspaces for CRM widget and Dynamics 365.

### Procedure

1. On Avaya Workspaces for CRM, click the agent state list.

The agent state list opens when you click the agent toolbar at the top of the CRM widget, where you can find your avatar and agent state.

2. Select one of the following options from the available list:

- **Go Ready:** Indicates that you are available to accept customer interactions.
- **Go Not Ready:** Indicates that you are not available to accept customer interactions. Select a reason, such as **Lunch**, **Coffee Break**, **Training**, or **In a meeting**.
- **Finish Work:** Indicates that you have finished work for the day.

---

## Finishing work

### About this task

At the end of your working day, change your agent state to indicate that you finished work. Changing your state informs your supervisor that you are no longer available to accept customer interactions.

Your administrator can enable the agent state synchronization between the Avaya Workspaces for CRM and Dynamics 365 Omnichannel queues. If the synchronization is enabled, agent state changes are reflected simultaneously in both Avaya Workspaces for CRM widget and Dynamics 365.

### Procedure

1. On Avaya Workspaces for CRM, click the agent state list.

The agent state list opens when you click the agent toolbar at the top of the CRM widget, where you can find your avatar and agent state.

2. Click **Finish Work**.

3. If you use Avaya Workspaces for CRM on multiple browser tabs, close the voice channel window after you log out to ensure the correct operation of the voice channel.

---

## Logging out of Avaya Workspaces for CRM

### About this task

After finishing work, log out of Avaya Workspaces for CRM.

### Before you begin

From the agent state list, click **Finish Work**.

### Procedure

On the Welcome page, click **Sign Out**.

---

## Emergency calling

Avaya Workspaces for CRM enables you to call emergency services without dialing additional digits, such as call prefixes. To call emergency services, dial an emergency number, such as 911. You can dial the emergency number in any agent state. When you call emergency services, Avaya Workspaces for CRM places you in the Not Ready state with the Emergency reason code. Change your state to Ready to handle customer interactions. If an emergency call disconnects due to an error, the emergency service provider can call you back. You receive the callback regardless of your agent state.

### Important:

The Emergency Calling feature is currently available only in the United States and Canada.

If you call emergency services, Avaya Workspaces for CRM passes your emergency location to the emergency service provider. When you log in to Avaya Workspaces for CRM, you see the Activate Agent page. This page displays the emergency locations that an account administrator configured. You must select the emergency location that matches your current address. The emergency service provider can send help to your emergency location. For example, the emergency service provider can send an ambulance if required.

The default emergency location that an account administrator sets is preselected, but you can select another emergency location. You can add a new emergency location if none of the existing emergency locations match your current address. You can edit an emergency location if you reach the maximum number of added emergency locations.

## Selecting an emergency location

### About this task

Select an emergency location, which to emergency services receives when you make an emergency call. You can select one of the emergency locations that an account administrator configured. Before selecting an emergency location, you can edit it or add a new emergency location.

### Before you begin

Log in to Avaya Workspaces for CRM.

## Procedure

1. On the Activate Agent page, in the **Location** list, select an emergency location.
2. Click **Activate**.

Avaya Workspaces for CRM displays the Welcome page.

## Related links

[Logging in to Avaya Workspaces for CRM](#) on page 15

## Adding an emergency location

### About this task

Add an emergency location if none of the emergency locations that Avaya Workspaces for CRM displays in the **Location** list match your current address.

### Procedure

1. On the Activate Agent page, in the **Location** list, click **Add new address**.

Avaya Workspaces for CRM displays the New Address window.

2. Fill in the fields.
3. Click **Save**.
4. Click **Activate**.

Avaya Workspaces for CRM displays the Welcome page.

## Related links

[Logging in to Avaya Workspaces for CRM](#) on page 15

[Emergency location field descriptions](#) on page 19

## Emergency location field descriptions

The following table lists the emergency location fields and descriptions:

Field	Description
<b>Location Name</b>	The name of the emergency location. For example, type: My Home Address.
<b>Street Number</b>	The street number for the location.
<b>Street Name</b>	The name of the street.
<b>Country</b>	The name of the country.
<b>State / Province</b>	The name of the state or province.
<b>City</b>	The name of the city.
<b>ZIP / Postal code</b>	The ZIP code or postal code.

### In-building location

The following table lists the in-building location fields and descriptions:


Field	Description
<b>Location</b>	The type of emergency location within a building. Select a location type from the list. For example, select <b>Apartment</b> to add your apartment to the emergency location information.
<b>Details</b>	The value associated with the type of emergency location. For example, to add apartment 6 to the emergency location, select <b>Apartment</b> in the <b>Location</b> list and then type 6 in the <b>Details</b> field.

## Editing an emergency location

### About this task

Edit an existing emergency location if you cannot add another location.

### Procedure

1. On the Activate Agent page, in the **Location** list, select the emergency location to edit.
2. Click .

Avaya Workspaces for CRM displays the New Address window.

3. Update the settings and click **OK**.
4. Click **Activate**.

Avaya Workspaces for CRM displays the Welcome page.

### Related links

[Logging in to Avaya Workspaces for CRM](#) on page 15

[Emergency location field descriptions](#) on page 19

## Calling emergency services


### About this task

When you call emergency services, Avaya Workspaces for CRM passes your emergency location to the emergency service provider. You can select an emergency location after logging in to Avaya Workspaces for CRM. You can call emergency services regardless of whether you are in the Ready or Not Ready state. When you call emergency services, Avaya Workspaces for CRM places you in the Not Ready state with the Emergency reason code. You must change your state to Ready to receive customer interactions. If the emergency call disconnects due to an error, the emergency service provider can call you back. You receive the callback regardless of your agent state.



#### Important:

The Emergency Calling feature is currently available only in the United States and Canada.

### Procedure

1. At the top of the page, click  and then click **Open Dialpad**.
2. Enter an emergency number using the keyboard or dialpad.

For example, in the United States, the emergency number is 911.

3. Click .
4. To end the emergency call, click .



---

## Popping out and resizing the Avaya Workspaces for CRM application window

### About this task

You can detach (pop out) the Avaya Workspaces for CRM application from your current browser window. You can then resize the CRM application window. The minimum recommended size is 300 pixels.

### Procedure

1. In Avaya Workspaces for CRM, click  to detach the application from your current browser window.
2. **(Optional)** Click and drag the corners of the detached Avaya Workspaces for CRM application window to resize it.
3. **(Optional)** Click  to reattach the application to the original browser window.








---

## Using the Search feature

### About this task

You can search for agents in your team or other contact center users. You can transfer the current interaction to them. You can see the Presence information of the agent.

### Procedure

1. On Avaya Workspaces for CRM, at the top of the widget, click .
2. Do one of the following:
  - Type any letters from the person's name and click  to send a mail or  to make a call. For example, type **bar** to display names such as Barbara Jones, Joe Bartlett, and Finbar Smith.
  - Type any numbers from the person's phone number and click  to send a mail or  to make a call. For example, type **901** to display phone numbers containing 901 in any part of the phone number.
  - Click **CRM Directory** to display matches from the CRM directory and click  to send a mail or  to make a call.

## Getting started

- Click **Open Dialpad** to use the dialpad.

# Chapter 4: Headset call control

Agents and supervisors can use the advanced call controls available on Jabra and Plantronics headsets to perform the following call operations:

- Answer a call
- Drop a call
- Put a call on hold
- Resume a call that is on hold
- Mute or unmute a call
- Adjust the call volume
- Handle multiple calls

Avaya Workspaces for CRM supports the Plantronics Savi 82xx series and the Jabra Evolve series headsets. Depending on the headset model that you use, you can use the buttons on the headsets to control call operations. You can use Bluetooth or USB connectors to connect your headsets to your Windows-based computers.

To find additional information about connecting your headsets to your computers, follow the instructions available in the user manuals that you receive with your headsets.

The Device Settings option in Avaya Workspaces for CRM displays the details of the headsets that you connect to your computer. Additionally, you can enable or disable the advanced call control options available on your headset.

## Plantronics headset

The Plantronics headsets include a multipurpose Call button and a Mute button that agents can use to perform call operations. To use the call control options on a Plantronics headset, download and install the Plantronics Hub software.

## Jabra headsets

Similar to the Plantronics headsets, Jabra headsets include a multipurpose Call button and a mute button. To ensure that you can use the call control options on a Jabra headset, add Jabra Chrome Extension to your Google Chrome browser. You must also download and install the Jabra device connector.

Similar to the Plantronics headset, you can use Bluetooth or the USB port to connect your Jabra headset to your computer.

## Prerequisites for using headset call controls

Before you connect a Plantronics or Jabra headset to your computer and use the call control features on the headsets, you must complete the prerequisites listed in this topic. Headset call controls are supported only for Windows.

**\* Note:**

If agents and supervisors do not have permission to perform the prerequisite operations on their Windows-based computers, they can contact the account administrator who can complete these prerequisites.

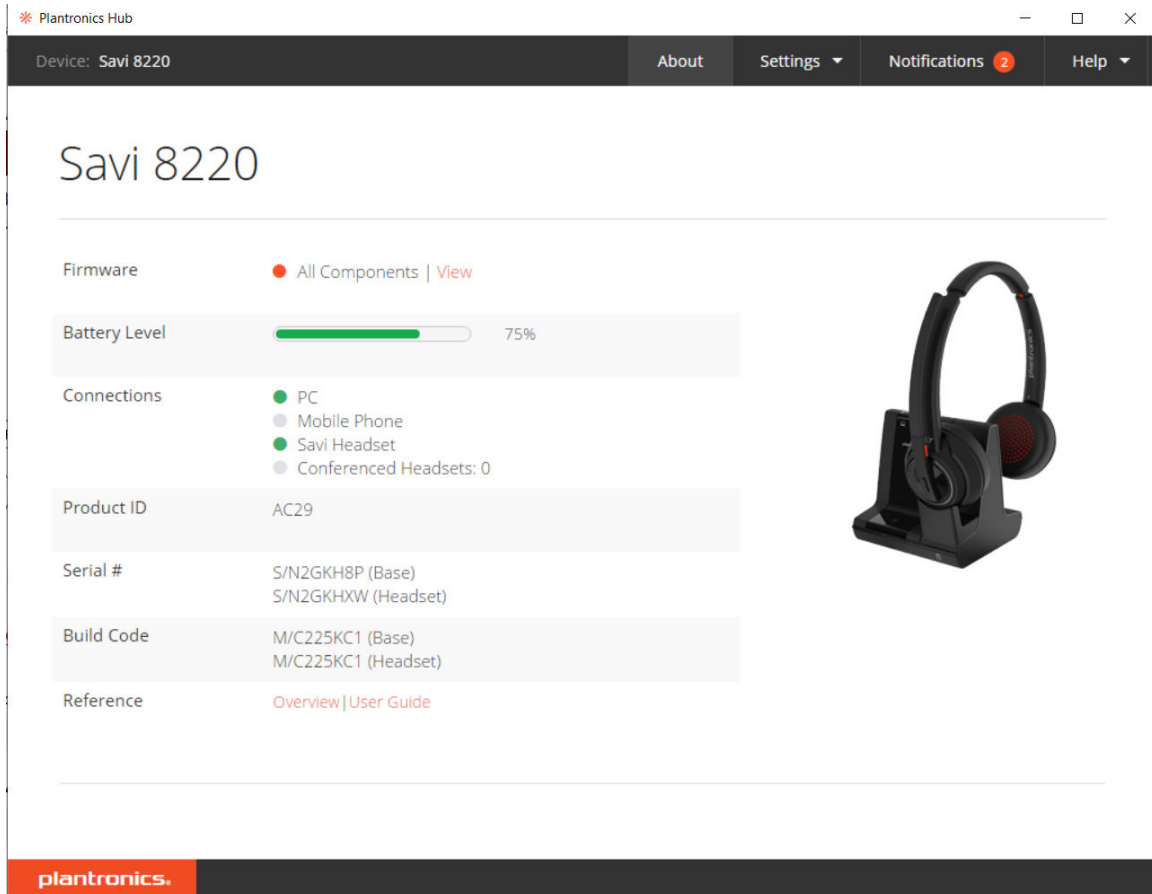


Figure 1: Plantronics Hub

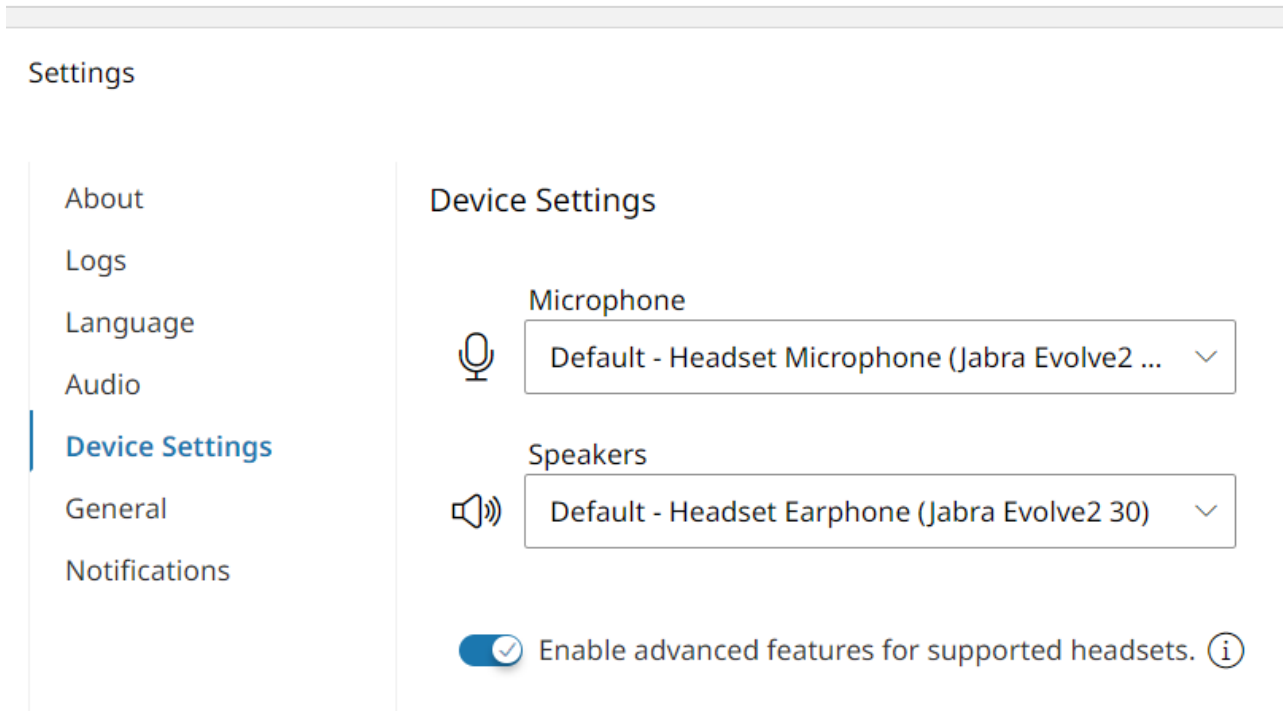
Headset	Prerequisite steps
For Plantronics headsets	<p>You require the Plantronics Hub software to use the call control features of your Plantronics headset.</p> <ol style="list-style-type: none"> <li>1. From the <a href="#">Poly Hub Desktop</a> page, download Plantronics Hub for Windows.</li> <li>2. Run the wizard to install Plantronics Hub.</li> </ol> <p>After you install Plantronics Hub and connect your Plantronics headset to your computer, Plantronics Hub displays the details of your headset. For example, you can view the name of the headset or the battery level. If you cannot view these details, follow the instructions in the Plantronics user manual that you received with your headset.</p> <p>Some Plantronics headsets include the headset and a headset base, whereas others include the headset and a dongle. You can connect the base to your computer through the USB port. You can also use Bluetooth to connect a Plantronics headset to your computer. However, you cannot use the call control features on the headset when you connect a headset with Bluetooth.</p> <p>Similarly, you must connect the dongle of a Plantronics headset to the USB port of your computer to use the call control features on your headset.</p>
For Jabra headsets	<p>You require a Jabra Chrome extension to your Google Chrome browser and a Windows device connector to use the call control features of your Jabra headset.</p> <ol style="list-style-type: none"> <li>1. To add the Google Chrome extension in your browser, on the <a href="#">Jabra Device Connector (Browser Extension)</a> page, click <b>Add to Chrome</b>.</li> <li>2. To download the device connector, on the <a href="#">Jabra Developers Overview</a> page, scroll to the Downloads Current Versions section and click <b>Download</b> corresponding to the <b>Device Connectors for Windows</b> option.</li> <li>3. Run <b>Jabra Chrome Host Setup Wizard</b>.</li> </ol>

An instruction manual is available with all Plantronics and Jabra headsets. Follow the instructions carefully and complete your headset setup to ensure that you have properly connected your headset to your computer.

---

## The Device Settings option

You can view the microphone and speaker settings in the Device Settings option in Avaya Workspaces. When you plug in or connect the headset to your computer, Avaya Workspaces displays the confirmation that the new device is connected. The Device Settings page displays the headset name as the default value in the Microphone and Speakers fields. If the Device Settings page does not display the connected headset, follow the instructions in the user manual that you received with your headset to correctly connect the headset to your computer.



**Figure 2: The Device Settings page**

You can enable or disable the option to use the advanced call control features on your headset. The advanced features are available only for Plantronics and Jabra headsets. If you select another headset option in the Microphone and Speaker fields, Avaya Workspaces disables this option.



Additionally, if you select a Jabra or Plantronics headset in one field and a different headset in the other field, Avaya Workspaces disables the advanced features option.

## Advanced call control features on Plantronics and Jabra headsets

Agents and supervisors can use the advanced call control features on their Plantronics and Jabra headsets only if they select the same headset model in the microphone and speaker settings.

For example, on the Device Settings page, if you select a Plantronics model in the Microphone field, you must select the same model in the Speakers field. If you select a different model in the Speakers field, you cannot use the advanced call control features of the headset. In this case, consequently, Avaya Workspaces uses the headset as a normal audio device. You must use the call control options in Avaya Workspaces to perform call operations, such as muting and unmuting a call, answering a call, or putting a call on hold.

Refer to the user manual you received with your headset to understand how to correctly connect your headset to your computer. Additionally, you can identify the call control options of the headsets in the manuals and view information about using these options.

Objective	Action	Result
Receive an incoming call.	Press the <b>Call</b> button on the headset.	<ul style="list-style-type: none"> <li>Avaya Workspaces receives the incoming call.</li> <li>Avaya Workspaces displays the call as Active.</li> </ul>
End an active call.	Press the <b>Call</b> button on the headset.	<ul style="list-style-type: none"> <li>Avaya Workspaces ends the call.</li> <li>Avaya Workspaces displays the call activity as Idle.</li> </ul>
Mute or unmute a call.	<ol style="list-style-type: none"> <li>Press the <b>Mute</b> button on the headset to mute a call.</li> <li>Press the <b>Mute</b> button on the headset to unmute a muted call.</li> </ol>	<ul style="list-style-type: none"> <li>Avaya Workspaces displays  as Active, indicating that the audio output is muted.</li> <li>Avaya Workspaces displays  as Idle, indicating that the audio output is unmuted.</li> </ul>
Hold or resume a call.	Long-press the <b>Call</b> button on the headset.	<ul style="list-style-type: none"> <li>If the agent puts the call on hold, Avaya Workspaces displays the interaction state as Held.</li> <li>Avaya Workspaces starts the Hold timer.</li> <li>If the agent resumes the call, Avaya Workspaces displays the interaction state as Active.</li> <li>Avaya Workspaces stops the Hold timer.</li> </ul>
Place a call on hold to receive another incoming call. Hold or resume a call.	Long-press the <b>Call</b> button on the headset.	<ul style="list-style-type: none"> <li>Avaya Workspaces puts the first call on hold.</li> <li>Avaya Workspaces receives the second incoming call.</li> </ul>
Place a call on hold in the case of multiple calls.	<ul style="list-style-type: none"> <li>Long-press the <b>Call</b> button on the headset.</li> <li>Press the <b>Call</b> button on the headset.</li> </ul>	<ul style="list-style-type: none"> <li>Avaya Workspaces puts the active call on hold and receives the next call in the queue.</li> <li>If the agent long-presses the <b>Call</b> button again, Avaya Workspaces puts the second call on hold and resumes the first call.</li> <li>If the agent single-presses the <b>Call</b> button, Avaya Workspaces ends the active call.</li> </ul>

# Chapter 5: Digital interactions

You can receive the following types of digital interactions from customers:

- Email with the customer's query
- Chat initiated on the web
- Social media messaging

As an agent, you can respond to interactions, transfer them to other agents or services, and close them. A Service is a group of people with a skill that can reside in another area of your organization, such as the Sales team, the Finance department, or the Spanish language desk. During or after an interaction, you can select a disposition code and add notes.

## Related links

[Using Salesforce with email interactions](#)

[Using Salesforce with chat interactions](#)

[Using Salesforce with asynchronous message interactions](#)

[Using Salesforce with multiple interactions](#)

[Using Microsoft Dynamics with email interactions](#)

[Using Microsoft Dynamics with chat interactions](#)

[Using Microsoft Dynamics with asynchronous message interactions](#)

[Using Microsoft Dynamics with multiple interactions](#)

[Using ServiceNow with email interactions](#)

[Using ServiceNow with chat interactions](#)

[Using ServiceNow with asynchronous message interactions](#)

[Using ServiceNow with multiple interactions](#)

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## Accepting digital interactions

### About this task

Customers can request help through a digital channel, such as chat, messaging, or email. When a customer requests help, Avaya Workspaces for CRM displays an alert.

You can see the source of the social media messaging interactions. Avaya Workspaces for CRM displays X (Twitter), Instagram, Facebook, and WhatsApp icons next to the customer's name as the indicators of the social media message source.

**\* Note:**

From March 1, 2025, Avaya does not support messaging integration with X (Twitter). You can no longer configure X (Twitter) social media accounts with Avaya Experience Platform™ or use X (Twitter) to send or receive messages to or from customers.

An account administrator can configure the behavior of the original browser window. For example, it can be configured to display the contact details associated with the customer who contacted you. If no contact details are associated with the customer, the original browser window might display the New Contact page, or it might continue to display the existing page.

**Before you begin**

Ensure that you are in the Ready state to receive interactions.

**Procedure**

On Avaya Workspaces for CRM, click the alert to accept the interaction.

Avaya Workspaces for CRM displays the interaction record containing the customer details and help request text.

## Rejecting digital interactions

**Procedure**

If you do not want to accept an interaction, do not click the alert.

The Alerting notification remains for 30 seconds. Then Avaya Workspaces for CRM places you in the Not Ready state.

## Responding to digital interactions

**About this task**


You can perform various actions after accepting a digital interaction. For example, you can transfer the interaction, add an attachment, or send an emoji. After completing the interaction, select a disposition code to summarize the outcome.

If you transfer or end an interaction, Avaya Workspaces for CRM closes it and places you in the Ready state so you can receive new interactions.

**Before you begin**

Accept a digital interaction.

**Procedure**

1. Do one of the following to send a response:
  - For chat and social media messaging, type a response in the message field and click .

- For emails, click ↩, ↶, or → and type a response.
2. Click one of the following to perform other actions:
    - ↔: To transfer the interaction to another agent or service.
    - 📄: To use a template for your response.
    - 😊: To send an emoji. This option is not available for email interactions.
    - 📎: To send an attachment.

For chat and social media messaging, the maximum supported file size is 25MB. For email, it is 20MB.
    - 🛑: To end the interaction.
    - ⋮: To access more options and select a disposition code for the interaction.

### Related links

- [Templates](#) on page 13
- [Using templates](#) on page 31
- [Adding disposition codes](#) on page 47
- [Transferring digital interactions](#) on page 30

---

## Ending digital interactions

### About this task

After you finish assisting the customer, end the interaction. When you end a digital interaction, Avaya Workspaces for CRM places you in the Ready state so you can receive a new interaction.

### Procedure

1. Send a farewell greeting to let the customer know that you are ending the interaction.
2. Click 🛑 to end a chat or messaging interaction.

To complete email interactions, reply to the email or forward it.

---

## Transferring digital interactions

### About this task

After responding to a digital interaction, you can transfer it to another agent or to the queue of another team or service. For example, if you are on the New Sales team, you can transfer a digital interaction to the Marketing team or to an individual agent in the Marketing team. You can search for an agent name or a team name. If you do not know the full name of the team or the agent, type any letters to display matches.

After you perform the transfer, if there is no response, Avaya Workspaces for CRM transfers the interaction back to your team.

### Procedure

1. Click  to start the transfer.

Avaya Workspaces for CRM displays the **Search** field under **Services** and **Users**.

2. Do one of the following to search for an agent or service:
  - Start typing a name in **Search** to initiate a directory search of agents and services.
  - Click **Services** to expand the list of available services or teams.
  - Click **Users** to expand the list of available agents.
3. Click the agent or service to complete the transfer.



---

## Attaching a file

### About this task

During a digital interaction, you can send an attachment, such as a file, audio recording, or video. Your administrator can enable or disable sending attachments.

### Procedure

1. Click  to add an attachment.
2. For a chat or messaging interaction, do one of the following:
  - To send a file, click **File**.
  - To send a video, click **Video Recording**.
  - To send an audio recording, click **Audio Recording**.
  - This feature is available for the Avaya Experience Platform™ Public Cloud voice channel.You cannot record an audio or video clip during an email interaction.
3. Click  to send the message with the attachment.

---


## Using templates

### About this task

An account administrator can create response templates for you to use when handling digital interactions with customers. Templates contain frequently used text or web links.

You can use WhatsApp templates to respond to WhatsApp messages. A WhatsApp template can contain buttons, macros, and media. An account administrator enables WhatsApp templates on Admin Portal.


You can use a combination of templates. For example, when responding to a customer email, you can use an email template and a URL template to add a link to a website.

The  icon next to the template title indicates that the template is specific to your queue. Templates without this icon are common for all agents.


## Before you begin

Ensure that you responded to a digital interaction.

## Procedure

1. Click .
2. Search for the appropriate template category.
3. To insert the template text into your response, click the template title and then click the template preview text.
4. **(Optional)** Edit the text before sending it.

To add other templates to your response, repeat the steps above.

5. Click  to send your response.

Avaya Workspaces for CRM saves the responses you create using templates in the conversation transcript.


---

# Recording an audio or video clip

## About this task

You can record an audio or video clip and send it to customers during a chat or messaging interaction. You cannot record an audio or video clip during an email interaction. Your administrator can enable or disable recording an audio or video clip.

## Procedure

1. During the digital interaction, click  and then do one of the following:
  - Click **Audio Recording**.
  - Click **Video Recording**.
2. Click the **Record** button to start recording.
3. When you finish recording, click **Close**.

Avaya Workspaces for CRM processes and attaches the recording to the chat transcript. This process can take several seconds.

4. Click **Send** to send the file to the customer.

---

## Sending an emoji

### About this task

You can send an emoji during a chat or messaging interaction. The option to select an emoji is not available for email interactions. Your administrator can enable or disable sending emojis.

### Procedure

1. Click 😊.
2. Select an emoji.
3. Click ↵ to send your message.

---

## Managing multiple interactions

### About this task

When you receive multiple interactions simultaneously, you can switch between interaction cards to communicate with different customers. Use the following procedure to switch from one interaction card to another.

### Procedure

1. On the header of the interaction card to switch, click ∨.  
Avaya Workspaces for CRM brings that interaction card into focus.
2. To switch to another interaction, on the header of the interaction card, click ^.

### Related links

[Using Salesforce with multiple interactions](#)

[Using Microsoft Dynamics with multiple interactions](#)

# Chapter 6: Voice interactions

Voice interactions are telephone calls from customers.

As an agent, you can respond to voice interactions, transfer the calls to other agents or Services, and end them. A Service is a group of people with a skill which can reside in another area of your organization, such as the "Sales team", the "Finance department", or the "Spanish language desk". You can also perform additional tasks such as adding dispositions and adding notes.

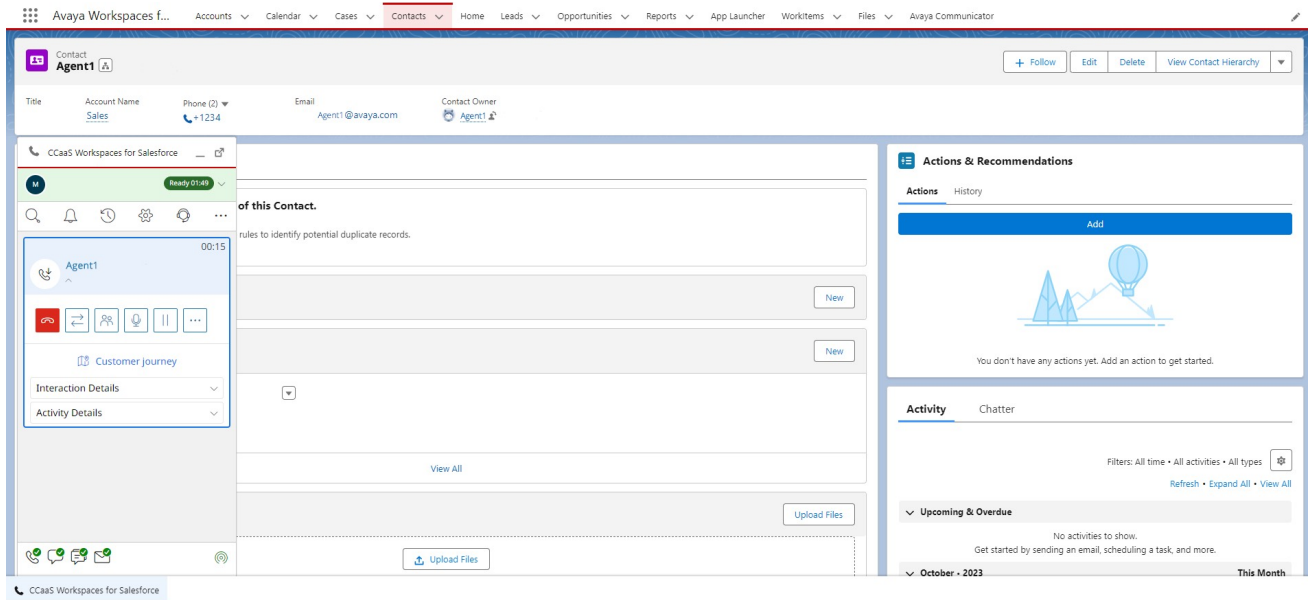


Figure 3: Example of an active voice interaction

## Related links

- [Using Salesforce with voice interactions](#)
- [Using Microsoft Dynamics with voice interactions](#)
- [Using ServiceNow with voice interactions](#)

---

## Accepting voice interactions

### About this task

When a customer requests help by phone, Avaya Workspaces for CRM displays an alert. You can accept the incoming voice interaction to assist the customer.

An account administrator can configure the behavior of the original browser window. For example, it can be configured to display the contact details associated with the customer who contacted you. If no contact details are associated with the customer, the original browser window might display the New Contact page, or it might continue to display the existing page.

### Before you begin

Ensure that you are in the Ready state to receive interactions.

### Procedure

1. On Avaya Workspaces for CRM, click the alert to accept the voice interaction.  
Avaya Workspaces for CRM displays the interaction record containing the customer details.
2. Begin speaking to communicate with the customer.

---

## Rejecting voice interactions

### Procedure

If you do not want to accept an interaction, do not click the alert.

The Alerting notification remains for 30 seconds. Then Avaya Workspaces for CRM places you in the Not Ready state.

---

## Creating contacts in Salesforce

### About this task

An account administrator can customize Avaya Workspaces for CRM to enable you to create a new contact when you receive an interaction from an unknown customer. For creating contacts, Avaya Workspaces for CRM returns the focus to the original browser window. You can find additional information about managing contacts and accounts in the [Salesforce documentation](#).

#### Note:

When you create records, such as contacts or accounts, Salesforce associates them with the selected interactions.

## Procedure

1. Accept an interaction from an unknown customer.  
Avaya Workspaces for CRM displays the New Contact window.
2. Complete the mandatory fields.
3. Do one of the following to link the contact to an account:
  - Select an account from the list of customer accounts.
  - If the contact is not from an existing account, create a new account.
4. Click **Save**.

Your contact center recognizes the customer the next time they request help and links all their interactions with their contact details and contact center account.

## Next steps

Respond to the interaction.

---

# Creating accounts in Salesforce

## About this task

When you create a new contact for an unknown customer, you must link the contact to a customer account. If the contact is not associated with an existing account, you can create a new one. For more information about managing contacts and accounts, see the [Salesforce documentation](#).

### **Note:**

When you create records, such as contacts or accounts, Salesforce associates them with the selected interactions.

## Procedure

1. Accept an interaction from an unknown customer.  
Avaya Workspaces for CRM displays the New Contact window.
2. From the **Account Name** list, select **+ New Account**.
3. Complete the mandatory fields.
4. Click **Save**.

Avaya Workspaces for CRM returns to the New Contact window and displays the newly-created account name in the **Account Name** field.

## Next steps

Finish creating the new contact in Salesforce.

---

## Responding to voice interactions

### About this task

Voice interactions are telephone calls from customers. This procedure summarizes the actions you can perform during a voice interaction. When you transfer or end the interaction, Avaya Workspaces for CRM closes it and places you in the Ready state.

### Before you begin

Accept a voice interaction.

### Procedure

1. Begin speaking to communicate with the customer.
2. Do one of the following:
  - Click # to enter DTMF digits.
  - Click || to place the caller on hold.
  - Click ⇄ to transfer the interaction to another service, agent, or telephone number.
  - Click ☎ to end the interaction.
  - Click ... to add a disposition code to the interaction or send an email.

---

## Ending voice interactions

### About this task

After addressing the customer's request, end the voice interaction. You must end the voice interaction to become available for another interaction.

### Procedure

1. Conclude the telephone call and let the customer know that you are ending the voice interaction.
2. Click ☎.

---

## Transferring voice interactions

### About this task

You can transfer a voice interaction to another agent or queue of a different team or service. For example, if you are in the New Sales team, you can transfer a voice interaction to the Existing Sales team or an individual agent in the Existing Sales team. You can search for an agent name or

a team name. If you do not know the full team or agent name, you can type any letters to display matches.

An account administrator can configure whether you can transfer the voice interaction internally, externally, or internationally.

If your account administrator configured external calling and Avaya Workspaces uses the default call routing, you must dial a PSTN or a SIP number to transfer calls to Avaya Aura X for Avaya Cloud Office (ACO) users. For example, +1xxxxxxxxxxx or sip:+1xxxxxxxxxxx. If your account administrator enabled dedicated routing for calls to Avaya Aura X for Avaya Cloud Office (ACO) users, you must dial Avaya Aura X for Avaya Cloud Office (ACO) numbers in the <PSTN number>@domain.com format. For example, +1xxxxxxxxxxx@avaya.com. You can also use Avaya Aura X for Avaya Cloud Office (ACO) extensions and dial <extension number>@domain.com. For more information about your contact center setup, contact the account administrator.

### Before you begin

Ensure that you responded to a voice interaction.

### Procedure

1. Click [↗](#).

Avaya Workspaces for CRM displays the **Search** field, **Services** list, and **Users** list.

2. Do one of the following to search for an agent or service:

- Click **Search** and start typing a name to initiate a directory search of agents and services.
- Click **Services** to expand the list of available services or teams.
- Click **Users** to expand the list of available agents.

3. Click the appropriate agent or service name to transfer the voice interaction.

If there is no response from the user or service, Avaya Workspaces for CRM transfers the voice interaction back to your team.

---

## Placing a call on hold

### About this task

You can place a call on hold if you need to quickly gather information or discuss an issue with your supervisor or another agent.


### Before you begin

Ensure that you responded to a voice interaction.

### Procedure

1. Click **||** to place the call on hold.

A timer is displayed to indicate the duration of the hold.

2. Click  to resume the call.

# Chapter 7: Supervising

---

## Supervisor dashboard

As a supervisor, you can use Avaya Workspaces for CRM to monitor agents. You can view a list of agents and information about the state and interactions of an agent. Use filters to search agents in a team, end sessions, disconnect calls, and broadcast messages. You can also observe, coach, and barge into chat, messaging, and voice interactions.

Use the information on the supervisor dashboard to help you decide whether intervention is required. Agents can see the supervisor observing or intervening in an interaction. Avaya Workspaces for CRM ends the observation session if the agent transfers the interaction. As a supervisor, you can observe agents, but agents cannot observe other agents.

For voice interactions, you can observe the incoming calls routed to agents or the outgoing calls initiated by agents. You can observe only one active voice call at a time. You can listen to the real-time voice conversation between the agent and the customer. To intervene, you can coach the agent directly and provide guidance. Alternatively, you can barge into the interaction and create a three-party conference. For digital interactions, you can also monitor the responses of an agent. Additionally, to coach agents, you can send them private messages.

You can also broadcast a message to all the agents you select. Avaya Workspaces for CRM displays this message as a notification or toast to all targeted agents.

You can also change an agent's state. This is a useful feature if the agent has left for the day and has forgotten to log out of Avaya Workspaces for CRM. When an agent logs out, you receive an information notification.

---

## Accessing the supervisor dashboard

### About this task

You can access the supervisor dashboard from Avaya Workspaces for CRM. By default, logged-in agents are displayed, but you can also view offline agents.

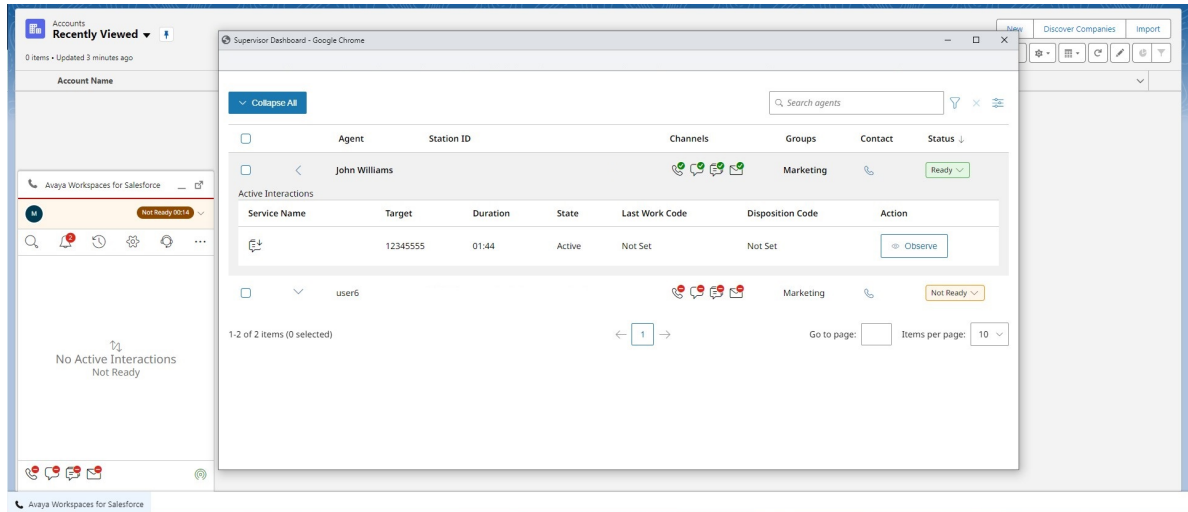
### Before you begin

Ensure that you are logged in to Avaya Workspaces for CRM as a supervisor.


## Procedure

1. From the top menu bar in Avaya Workspaces for CRM, click .

The supervisor dashboard opens in a separate window. It displays the agents in your group with details such as the agent ID, station ID, channels, group, and status (agent state).



**Figure 4: Example of the supervisor dashboard**

2. (Optional) To view offline agents in the list, click  and enable the **Show Offline Agents** switch.

## Customizing the displayed columns

### About this task

The supervisor dashboard includes columns with agent details. You can customize the columns to be displayed. The available columns include the following:

- Agent: Displays the agent name. This column is always available and cannot be disabled.
- ID: Displays the agent ID.
- Station ID: Displays the station ID.
- Channels: Displays the available channels for the agent and shows the Ready status for each channel.
- Groups: Displays the agent's group or team.
- Status: Displays the agent state. For example, Ready or Not Ready.

### Procedure

1. At the top of the supervisor dashboard, click .

2. Click **Columns** to expand the list of columns.
3. Use the switches to enable or disable columns, depending on the agent details you want displayed.

The enabled columns are displayed on the supervisor dashboard. In the following example image, the ID column is disabled and the others are enabled.




---

## Using the filtering options on the supervisor dashboard

### About this task

Use the filtering options on the supervisor dashboard to monitor agents based on their details. For example, you can combine filtering options and view agents with the voice channel who are also in the Ready state.

### Procedure

1. At the top of the supervisor dashboard, click .
2. Select filtering options from one or more of the following categories:
  - **Filter by Channels**
  - **Filter by Groups**
  - **Filter by State**

For example, to search for voice agents in the Ready state, select **Voice** in the **Filter by Channels** list and select **Ready** in the **Filter by State** list. You can select multiple options in each filtering category.

---

## Searching for agents

### About this task

You can search for an agent using the agent name and station ID.

### Before you begin

Ensure that you accessed the supervisor dashboard.

## Procedure

In the **Search agents** field, to search for an agent, type one of the following:

- Agent name
- Station ID

You can use a combination of searching and filtering to locate particular agents.

---

# Broadcasting a message to agents

## About this task

You can broadcast a message to online agents who are logged in for their shift, regardless of their agent state. You can send the message to all online agents or to specific agents. The agents receive a notification with the broadcasted message in Avaya Workspaces for CRM.

## Procedure

1. From the list of agents on the supervisor dashboard, select the check box next to the agents to whom you want to send a message.

Alternatively, select the check box at the top of the list, next to the column headings, to send a message to all online agents.

2. Click **Broadcast Message**.
3. In the window that is displayed, type your message and then click **Send Message**.


---

# Viewing agent interactions

## About this task

You can view the details of active agent interactions.

## Procedure

On the supervisor dashboard, click  to expand an agent row.

Avaya Workspaces for CRM displays information about the agent's active interactions.

---

## Changing the status of an agent on your team

### About this task

As a supervisor, you can change the state of an agent on your team. For example, an agent can leave or take a break while logged in to Avaya Workspaces for CRM. You can change their agent state to Not Ready or Logged Out to prevent the agent from receiving calls while they are away.

If you change the state of an active agent during an interaction, the agent's state changes to Pending. When the agent closes the interaction, the agent moves to the state you set.

Your administrator can enable the agent state synchronization between the Avaya Workspaces for CRM and Dynamics 365 Omnichannel queues. If the synchronization is enabled, agent state changes are reflected simultaneously in both Avaya Workspaces for CRM widget and Dynamics 365.

### Procedure

1. On the supervisor dashboard, locate the agent whose state you want to change.
2. Click the current agent state in the **Status** column.
3. Select the new agent state.

For example, you can change the agent state from **Ready** to **Not Ready**.

### Result

Avaya Workspaces for CRM displays the new agent state and sends a notification to the agent.



---

## Observing an agent

### About this task

You can observe active interactions. While observing, you can see the agent's interaction with the customer, but you cannot send messages to the agent or customer.

### Procedure

1. On the supervisor dashboard, locate the agent you want to observe.
2. Click  to expand the agent row and view active interactions.
3. In the Active Interactions section, under the Action column, click .

---

## Coaching an agent



### About this task

While observing an interaction, you can use the Coaching feature to provide guidance to the agent. During the coaching session, you can send private chat messages to the agent. The customer cannot see your messages.

### Before you begin

Ensure that you are observing an interaction.

### Procedure

1. On the interaction card, click .  
Avaya Workspaces for CRM alerts the agent that a supervisor is coaching the interaction.
2. On the Web Chat widget, click the **Coaching** tab.
3. In the **Enter message** field, type a private message for the agent and then click  to send it.

---

## Barging into an interaction

### About this task


While observing or coaching an agent, you can barge in to assist with an interaction. When you barge in, you join the interaction as an active third party. You, the agent, and the customer can send three-way messages to each other.

As a supervisor, you can barge in to chat, messaging, and voice interactions.

### Before you begin

Ensure that you are observing or coaching the interaction.

### Procedure

1. On the interaction card, click .  
The agent and customer receive a notification indicating that a supervisor is connected.
2. To actively participate in the interaction, type messages on the Customer tab.  
Both the agent and customer receive these messages.
3. **(Optional)** Use the Coaching tab to send private coaching messages to the agent.

# Chapter 8: Performing additional tasks

---

## Viewing your details

### About this task

You can view your details using the Avaya Workspaces for CRM widget. The details include your username, station ID, and login time.

The username displays the name that your account administrator configures for you. The station ID displays the internal extension number assigned to you. The login time displays your logged-in duration. If you are logged in for less than 24 hours, the duration is displayed in hours. If you are logged in for more than 24 hours, the duration is displayed as <number of days> + day(s). For example, 1+ day for more than 24 hours, 2+ days for 48 hours.

### Procedure

At the top of the Avaya Workspaces for CRM, click the agent toolbar.

### Result

Avaya Workspaces for CRM displays your details.


---

## Viewing reports

### About this task

Reports are a useful way to track information about interactions.

### Procedure

1. At the top of the Avaya Workspaces for CRM widget, click .
2. Click **View CRM Reports**.

The original browser window displays the Reports tab.

---

## Viewing previous interactions

### About this task

You can view information about previous interactions in the original browser window. You can also edit interaction details for your contact center.


 **Note:**

The transcript for digital interactions has a 32,000 character limit and it does not support attachments.

### Before you begin

Ensure that you responded to an interaction.

### Procedure

1. From the top menu bar in Avaya Workspaces for CRM widget, click .
2. Click the name of the customer interaction to view.

The original browser window displays information about the customer interaction.


---

## Adding disposition codes

### About this task

Add a disposition code to a digital or a voice interaction to describe or categorize this interaction. Disposition codes help indicate the outcome of an interaction or flag interactions that require follow-up, such as `Complaint` or `Issue resolved`.

### Procedure

1. After completing an interaction, click  and then click **Disposition Codes**.
2. Select a disposition code from the list.

Avaya Workspaces for CRM displays an icon to indicate that you applied a disposition code.

---

## Viewing interaction details

### About this task

You can access the following types of details for an ongoing interaction in Avaya Workspaces for CRM:

- The **Caller** field displays information about the caller, such as their phone number or email address.

- The **Called** field displays information about the call recipient, such as their phone number or email address.
- The **Queue** field displays the queue name from which the call originated. For example, `Sales`.
- The **Name** field displays the caller's name. For example, `John Smith`.

The exact information displayed for an interaction might vary depending on the configuration an account administrator performed.

### Procedure

1. During an interaction in Avaya Workspaces for CRM, scroll down and expand **Interaction Details**.
2. Review the interaction details.

---

## Adding comments to an interaction

### About this task

Avaya Workspaces for CRM saves the details of each interaction, such as the transcript and customer contact details. Your contact center links each interaction to a customer account. You can view an interaction and access the account details. Similarly, you can view an account and the history of previous interactions.

Add notes to each interaction to record any information that is not captured in the transcript in case another agent needs to check the status of the interaction. You can add notes during the interaction or after completing the interaction.

### Before you begin

Ensure that you responded to an interaction.

### Procedure

1. Expand **Activity Details** at the bottom of the Avaya Workspaces for CRM application.  
The **Name** field displays the contact name. For example, `John Smith`. If there is no contact name available, the **Name** field displays `None`. If you create a contact center record, such as a lead, contact, or account, Avaya Workspaces for CRM displays it here.
2. **(Optional)** For the **Related To** field, select a record from the original browser window.  
If you return the focus to the original browser window, you can select a contact center record, such as a case or an opportunity, and Avaya Workspaces for CRM displays it here. Alternatively, you can leave this field blank.
3. In the **Comments** field, type your notes.  
The maximum number of characters is 32,000.
4. **(Optional)** Type additional notes in the remaining fields.

An account administrator can configure additional fields that are customized for your company. Your contact center automatically saves your notes.

5. **(Optional)** If you forget to add notes during the live interaction, do the following to add them later:
  - a. In the original browser window, navigate to the task for the interaction.
  - b. Click **Edit Comments**.
  - c. Type additional notes at the beginning or end of the transcript.
  - d. Click **Save**.

## Making calls

### About this task


You can make calls to agents in your team or other enterprise users. Enterprise users can be from any part of your company, such as the Finance department. An account administrator can configure whether you can dial internally, externally, or internationally.

If your account administrator configures external calling and Avaya Workspaces uses the default call routing, you must dial a PSTN or a SIP number for calls to Avaya Aura X for Avaya Cloud Office (ACO) users. For example, `+1xxxxxxxxxx` or `sip:+1xxxxxxxxxx`. If your account administrator enables dedicated routing for calls to Avaya Aura X for Avaya Cloud Office (ACO) users, you must dial Avaya Aura X for Avaya Cloud Office (ACO) numbers in the `<PSTN number>@domain.com` format. For example, `+1xxxxxxxxxx@avaya.com`. You can also use Avaya Aura X for Avaya Cloud Office (ACO) extensions and dial `<extension number>@domain.com`. For more information about your contact center setup, contact the account administrator.




When you make an external call, the selected caller ID displays on the customer's device. You can change this ID and choose a different caller ID if multiple caller IDs exist in the associated resource partition. If the account administrator assigns multiple resource partitions to your profile, you can select any resource partition and associated caller ID.


If you do not select a caller ID from the list, Avaya Workspaces uses the default caller ID. Avaya Workspaces displays a caller ID according to the default call routing rules if the account administrator does not assign a default caller ID from a resource partition to your profile. If there are multiple caller IDs in a resource partition or multiple resource partitions with multiple caller IDs, you can change the default caller ID and select another caller ID of your choice.

### Procedure

1. From the **Quality Control Help** list, select a caller ID to display as the caller ID when you make the call.  
You can click **System Defined** to use the default call ID.
2. On Avaya Workspaces for CRM, at the top of the widget, click .

3. Do one of the following:

- In the search field, type the phone number and click .
- Open the dial pad, dial the phone number, and click .
- Open CRM Directory, find the contact, and click  next to the name.

To make a call, you can also redial a number that you previously called or click  on a CRM contact center record, such as a contact card, a case, or an opportunity.

Avaya Workspaces for CRM dials the telephone number.




---

## Redialing recent numbers

### About this task

You can redial a number you called within the same login session.

### Procedure

1. At the bottom of the Avaya Workspaces for CRM application, click .
2. Do one of the following:
  - To redial the last number you called, click .
  - To call another phone number in the list, hover over the number or contact name and click .

---

## Viewing customer journey information


### About this task

The Customer Journey widget provides a graphical representation of the end-to-end journey of the customer.


Use the **Transcript** option to view virtual agent voice, chat, messaging, email, and social media messaging interactions. You can also view rich media attachments in the **Transcript** window. The attachments can include any of the following:

- Carousels
- Locations, location requests, and locations with optional fields
- Buttons, such as Postback and Reply buttons, and buttons with icons
- Links with text, postback, and images
- Customer replies

## Procedure


1. After you accept an interaction, click  to view customer journey information.
2. **(Optional)** To review transcripts of virtual agent voice, chat, messaging, email, and social media messaging interactions, click **Transcript**.

For email and messaging transcripts containing attachments, the transcript displays a link. You can use this link to download the associated attachments.

For emails that an agent or supervisor initiated and sent to the customer, the customer journey information displays .

3. **(Optional)** To view the stories mentioning your Instagram account, click the message notifying you about the mention.
4. **(Optional)** To view the transfer details, on the active interaction, click the **Transfer event** icon.

The number on the Transfer event icon indicates the number of times the agent transfers an interaction. This number is a variable, and the indicator changes depending on the occurrences of the transfer action.

For example,  indicates that the interaction was transferred twice.

The Customer Journey widget does not display any increase in the transfer indicator during the supervisor barge-in and from the interactions routed through bots.

The Transfer Details dialog box displays further details. For more information about these details, see [Customer Journey for transfer scenarios](#).

## Related links

[Using the Customer Journey Widget](#)

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# Consult interactions

Avaya Workspaces for CRM supports the Consult feature. With this feature, agents can send a consult request to another agent, supervisor, or an external source during a customer interaction to get assistance. Agents can send a consult request to a user or service queue. For example, for finance-related customer queries, agents can send a consult request to the Finance queue to get assistance from the finance department. Here, the consulting agent is the agent who sends the consult request to receive assistance, and the consulted agent is the agent who assists the consulting agent. Agents can also send a consult request to an external source outside of their organization.

During the consultation, consulting agents can do the following actions:

- Put the customer's call on hold.
- Move between calls.
- Transfer or disconnect from the consultation or remain in the conference call.

- Resume the customer call.

If the agent or the external source receiving a consultation call is unavailable or does not answer the call within the RONA timeout period, the call remains on hold in the queue until a consulted agent or the external source is available. If the consulting agent, consulted agent, supervisor, or external source cancels the consult request, the consulting agent returns to the call with the customer.

After receiving a consultation from another agent or an external source, the consulting agent can complete the consultation call as a transfer or a conference. In both instances, Avaya Experience Platform™ Public Cloud uses the caller's country code to complete the call.

### **Consult complete as transfer**

The consulting agents can transfer a customer interaction to another agent, supervisor, or an external source after the consultation call. After the transfer is complete, the consulting agent drops from the call with the customer. The agent, supervisor, or external source receiving a consultation call request joins the call with the customer. If the consulted agent, supervisor, or external source is unavailable for the call, the consulting agent can cancel the consult request and return to the call with the customer.

### **Consult complete as conference**

The consulting agents can complete the consultation call as a conference. After completing the consultation call as a conference, the customer automatically joins the conference with the consulting agent and the consulted agent, supervisor, or external source. If the consulted agent, supervisor, or external source is unavailable for the call, the consulting agent can cancel the consult request and return to the call with the customer.

#### **Related links**

[Adding other agents to an interaction](#) on page 52

## **Adding other agents to an interaction**

### **About this task**

With the Consult feature, you can receive assistance from the supervisor, other agents, or external sources during an interaction with the customer. After a consultation call ends, you can end the call and resume the conversation with the customer. You can also complete the consultation call as a transfer or conference. If you complete the consultation call as a transfer, you drop from the call, and the consulted agents, supervisor, or external sources take over the call. You can include upto six parties in a conference.

If you end the consultation call as a conference, you initiate a six-way conference with the customer, consulted agents, or supervisor, and yourself. If you consult to external sources and end the consultation call as a conference, you initiate a six-way conference with the customer, external sources, and yourself.



If your account administrator configured external calling and Avaya Workspaces uses the default call routing, you must dial a PSTN or a SIP number for calls to Avaya Aura X for Avaya Cloud Office (ACO) users. For example, `+1xxxxxxxxxx` or `sip:+1xxxxxxxxxx`. If your account administrator enabled dedicated routing for calls to Avaya Aura X for Avaya Cloud Office (ACO) users, you must dial Avaya Aura X for Avaya Cloud Office (ACO) numbers in the `<PSTN number>@domain.com` format. For example, `+1xxxxxxxxxx@avaya.com`. You can also use Avaya Aura X for Avaya Cloud Office (ACO) extensions and dial `<extension`

`number>@domain.com`. For more information about your contact center setup, contact the account administrator.



## Before you begin

Ensure that you are in the Ready state and accept an incoming interaction.

## Procedure

1. On the voice interaction widget, click .
2. Do one of the following:
  - In the **Search** field, type the agent, supervisor, queue name, or external phone number to request a consultation call.
  - In the **Services** list, select a queue to request a consultation call from another agent or a supervisor in the queue.
  - In the **Users** list, select the agent or agents to send a consult request.
  - Click  to resume the interaction on hold.

The consultation call starts if the consulted agents, supervisor, or external sources accept the consult request. Avaya Workspaces for CRM displays a new interaction card within the existing interaction card.

3. Do one of the following:
  - Click  to transfer the call to the consulted agents, supervisor, or external sources.
  - Click  to complete the consultation call as a conference.

## Related links

[Consult interactions](#) on page 51

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# Internal extension call

Agents and supervisors can make internal calls to other agents and supervisors. For example, a supervisor can call an agent about the work schedule, or an agent can call the supervisor to discuss the issues related to appraisal. The agents and supervisors must be on the same account to make internal extension calls.

If an agent is on a customer call:

- The agent can only make a consultation call to another agent for customer-related queries. Avaya Workspaces for CRM blocks the agent from making other external calls.
- The agent can receive an internal call request, but if the agent answers the call, Avaya Workspaces for CRM automatically puts the customer call on hold. This feature applies to all external and emergency calls.

- The agent can ignore the internal extension call and can click to return the call from the list of missed calls or call history. If the agent does not answer the call and the calling agent does not cancel the call, the call times out in 60 seconds.

The internal extension call feature supports the following options:

- End call
- Mute or Unmute
- Hold or Unhold

While waiting on hold, the customer hears on-hold music.

- DTMF keypad

The internal extension call feature does not support autoanswer.

Avaya Workspaces for CRM uses the country code of the caller for an internal extension call.

If you cannot access to the internal extension call feature, contact Avaya Support.

### Related links

[Making internal extension calls](#) on page 54

## Making internal extension calls





### About this task

You can make internal calls to other agents and supervisors. For example, you can call an agent from the Finance department for finance-related customer queries. While on a call with a customer, you can receive internal extension calls. You can put the customer call on hold and answer the internal extension call or stay on the customer call and cancel the internal extension call request. If you ignore the internal extension call, you can later find the call details in the missed calls or call history.




### Before you begin

Ensure that you are logged in to your CRM and activated Avaya Workspaces for CRM.

### Procedure

1. On Avaya Workspaces for CRM, at the top of the widget, click .
2. Do one of the following:
  - In the **Search** field, type the phone number and click .
  - Open the dial pad, dial the phone number, and click .
  - Click **CRM Directory**, find the contact in the list, and click  next to the name of the agent or the supervisor.

The CRM Directory title is platform-specific. For example, if you use ServiceNow, click **ServiceNow Directory**.

- Click  and click  next to the name of the agent or the supervisor to make a call, or click  to call the last agent you called.

Avaya Workspaces for CRM dials the phone number.

### Related links

[Internal extension call](#) on page 53

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## ACW state for wrapping up an interaction

With the After Contact Work (ACW) feature, agents perform additional work after an interaction. An account administrator can enable ACW per channel or queue in Application Center Administration.

If an account administrator enables ACW, you automatically enter the ACW state when you end an interaction or the customer leaves. In the ACW state, you see the transcript and duration of the interaction, the interaction details, and the duration of the ACW state. You can select a disposition code for the interaction and add comments with additional information. The disposition code is saved in the interaction log entry. You can close the interaction card to end ACW. If your administrator enables timed ACW, the ACW card disappears automatically after the countdown finishes.

If an account administrator enables multiple interactions per channel or queue, you can manage the ACW state for each interaction separately to process more interactions. You do not enter the ACW state after transferring an interaction to another agent.


As a supervisor, you enter the ACW state after barging into an interaction. You do not enter the ACW state if you are observing or coaching the interaction.

## Closing the ACW card

### About this task

In the ACW state, you can perform additional work after an interaction. Review information about the interaction and add comments with additional information. After completing this additional work, close the ACW card. If your administrator enables timed ACW, the ACW card disappears automatically after the countdown finishes.

### Procedure

Click  to close the ACW card.

Your agent state changes to Ready so you can receive a new interaction.

### Related links

[Completing After Contact Work](#)

---

## Notifications

In Avaya Workspaces for CRM, you can receive sound and desktop notifications while working in a different browser tab or application. You receive notifications in the following situations:

- Avaya Workspaces for CRM changes your state. You do not receive notifications for pending states.
- An incoming interaction goes to Redirect On No Answer (RONA) and Avaya Workspaces for CRM changes your state to Not Ready.
- You receive a new interaction.
- You receive a new message in an active chat or messaging interaction.

You can filter notifications based on the notification type. You can select one or more filters. The following filtering options are available:

- **Error:** Displays technical errors. For example, "Contact is unavailable for voice interactions" or "The email address you entered is not correct".
- **Warning:** Displays information about issues that can lead to technical errors. For example, "The remote server is upgraded" or "Call service is unavailable".
- **Info:** Provides information, such as "The supervisor has entered an interaction" or "Call service is available".
- **Success:** Displays successful actions, such as "The selected device settings are saved".

You can configure notifications for new interactions and agent state changes in the Google Chrome browser settings. By default, Google Chrome asks if Avaya Workspaces for CRM can send you notifications. You can change the notification settings for Avaya Workspaces for CRM in Google Chrome at any time.

Use Avaya Workspaces for CRM to configure notifications for new messages in active chat and messaging interactions. If you disable notifications in Google Chrome and enable them in Avaya Workspaces for CRM, you still receive notifications for active chat and messaging interaction updates.


When you receive a desktop notification, the window contains information about the subject of the notification, such as `You have a new incoming interaction on the WebChat channel`. Desktop notifications that you receive while sharing your screen are hidden.

## Viewing notification logs


### About this task

You can view Avaya Workspaces for CRM notifications to receive information about various activities and technical issues. For example, if you have connection problems, Avaya Workspaces for CRM sends a notification alarm. You can filter the notifications based on the notification type. For example, you can select **Error** to see the notifications related to technical issues on the notification log.

### Procedure

1. On the top toolbar, click .

Avaya Workspaces for CRM displays the list of current notifications and their arrival time.

2. Click .
3. Select one or more of the following options to view corresponding messages:
  - **Error**
  - **Warning**
  - **Success**
  - **Info**
4. **(Optional)** At the top of the notification list, click **Clear All** to clear notifications.

### Result

Avaya Workspaces for CRM lists the notifications of the type you selected on the notification log.

## Configuring notifications for new interactions and agent states

### About this task

Configure notifications for new interactions and changing agent states in your Google Chrome browser. You can configure notifications for voice, email, chat, and messaging interactions.

An administrator can manage the permission settings. Contact your administrator for more information.

### Procedure


1. In the Google Chrome toolbar, click ... .
2. Click **Settings**.
3. Click **Privacy and security > Site Settings > Notifications**.
4. In the Customized behavior section, configure notifications for Avaya Workspaces for CRM.

## Configuring notifications for active interactions

### About this task

Manage the notification settings for active interactions in Avaya Workspaces for CRM. You can configure sound and desktop notifications for chat and messaging interactions.

### Procedure

1. In Avaya Workspaces for CRM, click .
2. In the Settings window, click the **User Preferences** tab.
3. Under **Sound notifications for new text message** and **Desktop notifications for new text message**, select one of the following options:
  - **Always Enabled**: Displays notification for all new messages.
  - **Enabled if no focus**: Displays notifications if you work on a different browser tab or application.

Performing additional tasks

- **Disabled:** Does not display notifications.

4. Click **Save**.

# Chapter 9: Troubleshooting


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## Downloading logs

### About this task

If you experience technical difficulties and want to save a record of your actions for troubleshooting purposes, download a log of your recent activities on Avaya Workspaces for CRM. Before downloading the log, you can configure the logging level, which specifies how much information log files display.

### Procedure

1. From the top menu bar in Avaya Workspaces for CRM, click .
2. On the Logs tab, select one of the following logging level options:
  - **High:** These logs do not contain any personal information about customers.
  - **Medium:** These logs do not contain personal information about customers. Instead, they replace each instance of personal information with a confirmation message to indicate that the value was received.
  - **None:** These logs contain personal information about customers.
  - **Disable Logging:** Avaya Workspaces for CRM does not generate any logs.
3. In the **Log persistence duration (minutes)** field, enter the period for which you want to collect logs.

The minimum value is 0.
4. Click **Download**.

You can access the log file from the Downloads folder on your computer.
5. **(Optional)** Use a text editor to open the log file or email it to your account administrator.

An example of a text editor is Notepad.


---

## Locating the version number and support information

### About this task

General information about the Avaya Workspaces for CRM application can be useful for troubleshooting purposes. You can check the version number and access various support links.

## Procedure

1. From the top menu bar in Avaya Workspaces for CRM, click .
2. Click the **About** tab.

The following information is displayed:

- Application version
- Support links
- Link to legal and security documentation

---

## Viewing system notifications

### About this task

Review Avaya Workspaces for CRM system notifications to find out about technical issues. For example, if you have connection problems, Avaya Workspaces for CRM sends a notification alarm.

### Procedure

From the top menu bar in Avaya Workspaces for CRM, click .

Avaya Workspaces for CRM displays a list of notifications and their arrival time.

### Related links

[Clearing system notifications](#) on page 60

## Clearing system notifications

### Before you begin

View system notifications.

### Procedure

At the top of the notification list, click **Clear All**.

### Related links

[Viewing system notifications](#) on page 60

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## Using multiple browser tabs with voice channel

### About this task

If your administrator enabled local session sharing, you see an additional pop-up window for the voice channel.

## **Before you begin**

Ensure that you configure your browser settings to enable pop-ups.

## **Procedure**

If your administrator set **Use local session sharing? (Y/N)** to Y, do not close the pop-up window for the voice channel until you complete your work.

# Chapter 10: Resources

## Resources for Avaya Experience Platform™ Public Cloud Documentation

### Related documents and videos

Title	Available at:	Use the document or videos to:	Audience
Overview			
<i>Avaya Experience Platform™ Public Cloud Solution Description</i>	<a href="#">Avaya Experience Platform™ Public Cloud Solution Description</a>	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	<ul style="list-style-type: none"> <li>• Business partners</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> <li>• Solution architects</li> </ul>
Implementing			
<i>Configuring Workflows for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Workflows overview for Avaya Experience Platform™ Public Cloud</a>	Create, edit, and manage workflows for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Business analysts</li> <li>• Developers</li> </ul>
Administering			
<i>Administering Avaya Experience Platform™ Public Cloud</i>	<a href="#">Administering Avaya Experience Platform™ Public Cloud</a>	Administer Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Supervisors</li> </ul>
Using			

*Table continues...*

<b>Title</b>	<b>Available at:</b>	<b>Use the document or videos to:</b>	<b>Audience</b>
<i>Using Avaya Workspaces for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Using Avaya Workspaces for Avaya Experience Platform™ Public Cloud</a>	Use the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>
<i>Using Analytics for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Using Analytics for Avaya Experience Platform™ Public Cloud</a>	Use the features and capabilities of Avaya Analytics™ for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Report designers</li> <li>• Supervisors</li> </ul>
<b>Integrating</b>			
<i>Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</a>	Configure and administer the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• CRM administrators</li> <li>• Developers</li> </ul>
<i>Using Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Using Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</a>	Use the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>
<i>Deploying Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Deploying Preview Dialing for Avaya Experience Platform™ Public Cloud</a>	Deploy the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
<i>Configuring Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Configuring Preview Dialing for Avaya Experience Platform™ Public Cloud</a>	Configure and administer the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
<i>Using Preview Dialing in Avaya Workspaces</i>	<a href="#">Using Preview Dialing in Avaya Workspaces</a>	Use the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>

Table continues...

<b>Title</b>	<b>Available at:</b>	<b>Use the document or videos to:</b>	<b>Audience</b>
<i>Configuring corporate contacts for Avaya Workspaces</i>	<a href="#">Configuring corporate contacts for Avaya Workspaces</a>	Configure and administer the features and capabilities of the Corporate Contacts widget in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
<i>Using corporate contacts in Avaya Workspaces</i>	<a href="#">Using corporate contacts in Avaya Workspaces</a>	Use the features and capabilities of the Corporate Contacts widget in Avaya Workspaces.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>
<i>Configuring Avaya Social Connections for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Configuring Avaya Social Connections for Avaya Experience Platform™ Public Cloud</a>	Configure Avaya Social Connections to add administrators and social media accounts, and manage social media customers.	Account administrators
<i>Using Avaya Social Connections for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Using Avaya Social Connections for Avaya Experience Platform™ Public Cloud</a>	Interact with customers through monitored social media accounts.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>
<b>Verint Workforce Engagement documents</b>			
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Desktop Applications Deployment Reference and Installation Guide</i>	<a href="#">Avaya Support link</a>	Configure and administer the features and capabilities of client applications installed on end-user workstations.	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Real-Time Agent Assist Setup Guide</i>	<a href="#">Avaya Support link</a>	Configure and administer the features and capabilities of Verint Workforce Engagement Real-Time Agent Assist.	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>

*Table continues...*

<b>Title</b>	<b>Available at:</b>	<b>Use the document or videos to:</b>	<b>Audience</b>
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Technology, Security, and Network Integration Deployment Reference Guide</i>	<a href="#">Avaya Support link</a>	Understand the technology, networking, and security requirements for connecting to Verint Workforce Engagement.	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
<i>Avaya Experience Management™ Getting Started Guide</i>	<a href="#">Avaya Support link</a>	Use the features and capabilities of the Avaya Experience Management™ application for the first time.	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Implementation engineers</li> <li>• Sales engineers</li> </ul>
Videos			
<i>Avaya Experience Platform™ Public Cloud Application Center Administration Videos</i>	<a href="#">Getting started with Administration Center</a>	Administer Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Supervisors</li> </ul>
<i>Orchestration Videos</i>	<a href="#">Getting started with Orchestration</a>	Manage workflows.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Business analysts</li> <li>• Developers</li> </ul>
<i>Avaya Experience Platform™ Public Cloud Automation Videos</i>	<a href="#">Getting started with Automation</a>	Manage the features and capabilities of Automation for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Business analysts</li> <li>• Developers</li> </ul>
<i>Administering Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Administering Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud</a>	Configure and administer the features and capabilities of Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud.	Account administrators
<i>Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Administering Avaya Experience Platform™ Public Cloud Workspaces for CRM</a>	Administer Avaya Experience Platform™ Public Cloud Avaya Workspaces for CRM.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• CRM administrators</li> <li>• Supervisors</li> </ul>

Table continues...

Title	Available at:	Use the document or videos to:	Audience
<i>Using Avaya Experience Platform™ Public Cloud for supervisors</i>	<ul style="list-style-type: none"> <li>• <a href="#">Getting Started with Avaya Workspaces for Supervisors</a></li> <li>• <a href="#">Running historical reports and dashboards</a></li> </ul>	Manage real-time and historical reports.	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Supervisors</li> </ul>
<i>Using Avaya Experience Platform™ Public Cloud for agents</i>	<a href="#">Launching agent desktop</a>	Manage the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>
<i>Getting started with Avaya Experience Platform™ Public Cloud</i>	<a href="#">Overview - Avaya Experience Platform™ Public Cloud</a>	Get an overview of Avaya Experience Platform™ Public Cloud and its components.	All audiences
<i>Getting started with Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	<a href="#">Getting started with Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</a>	Get an overview of Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud and manage interactions.	All audiences

## Avaya Documentation Center navigation

For many programs, the latest customer documentation is available on the Avaya Documentation Center website at <https://documentation.avaya.com>. Some functionality is only available when you log in to the Avaya Documentation Center. The available functionality depends on your role.

### Important:

If the documentation you are looking for is not available on the Avaya Documentation Center, you can find it on the [Avaya Support website](#).

While navigating through the Documentation Center, you can click the **Avaya Documentation Center** logo at the top of the screen to return to the home page anytime. On the Avaya Documentation Center, you can do the following:

- Click **Avaya Links** in the top menu bar to access other Avaya websites, including the Avaya Support website.
- Click **Languages** (🌐) in the top menu bar to change the display language and view localized documents.
- In the **Search Documentation** field, search for keywords and click **Filter** to filter by solution category, product, or user role.

You can select multiple items in each filter category. For example, you can select a product and multiple user roles.

- Click **Library** in the top menu bar to access the complete library of documents. Use the filtering options to refine your results.
- After performing a search or accessing the library, you can sort content on the search results page. When you find the item you want to view, click it to open it.
- Use the table of contents in a document for navigation. You can also click < or > next to the document title to navigate to the previous topic or the next topic.
- Click **Share** (↗) to share a topic by email or copy the URL.
- Download a PDF of the current topic in a document, the topic and its subtopics, or the entire document.
- Print the section you are viewing.
- Add content to a collection by clicking **Add to My Topics** (📁). You can add the topic and its subtopics or add the entire publication.
- View the topics in your collections. To access your collections, click your name in the top menu bar and then click **My Topics**.

You can do the following:

- Create, rename, and delete a collection.
  - Set a collection as the default or favorite collection.
  - Save a PDF of the selected content in a collection and download it to your computer.
  - Share content in a collection with others through email.
  - Receive collections that others have shared with you.
  - Click **Watch** (👁) to add a topic to your watchlist so you are notified when the content is updated or removed.
  - View and manage your watchlist by clicking **Watchlist** from the top menu with your name.
- You can do the following:
- Enable **Email notifications** to receive email alerts.
  - Unwatch the selected content or all topics.
- Send feedback for a topic.

## Resource Center

Avaya Experience Platform™ Public Cloud contains a Resource Center which gives access to online help. You can access help from Avaya Workspaces and Application Center Administration screens. From these screens, Resource Center suggests topics appropriate to your current page. You can also access tutorial videos and documentation using this feature.

### Related links

[Accessing online help](#) on page 68

[Welcome guides](#) on page 68

## Accessing online help


### About this task

Avaya Experience Platform™ Public Cloud contains online help for Avaya Workspaces and Application Center Administration.

### Before you begin

Log in to Avaya Workspaces or Application Center Administration.

### Procedure

1. Click .
2. On **Resource Center**, do one of the following:
  - Click **Documentation**.
  - Click **Tutorial Videos**.


Avaya Experience Platform™ Public Cloud opens a new browser tab to display the document or video.

### Related links

[Resource Center](#) on page 67

### Welcome guides

Avaya Experience Platform™ Public Cloud contains guided walkthroughs which provide first-time visitors with a tour of the interface. Avaya Workspaces and Application Center Administration support these tours.

- To start the tour, click **Launch Tour**.
- To close the tour, click .

### Related links

[Resource Center](#) on page 67

## Training

The following courses are available for Avaya Experience Platform™ Public Cloud.

Course code	Course title	Direct link	Delivery type
Administrator			
61380W	Administering Avaya Experience Platform™ Public Cloud	<a href="#">Administering Avaya Experience Platform™ Public Cloud</a>	Web-based training

*Table continues...*

Course code	Course title	Direct link	Delivery type
61410W	Administrating Avaya Experience Platform™ Public Cloud Workflows	<a href="#">Administrating Avaya Experience Platform™ Public Cloud Workflows</a>	Web-based training
61420W	Administering Avaya Experience Platform™ Public Cloud Self-Service	<a href="#">Administering Avaya Experience Platform™ Public Cloud Self-Service</a>	Web-based training
61000W	Getting Started with Avaya Experience Platform™ Public Cloud	<a href="#">Getting Started with Avaya Experience Platform™ Public Cloud</a>	Web-based training
ASAC-0036	Avaya Experience Platform™ Public Cloud Administrator	<a href="#">Avaya Experience Platform™ Public Cloud Administrator</a>	Web-based training
ASAC-0030	Avaya Aura X for Avaya Cloud Office (ACO) Administration	—	Web-based training
End user			
ALEU-5017	Avaya Experience Platform™ Public Cloud End User Training	—	Web-based training
62420W	Using Avaya Experience Platform™ Public Cloud for Agents	<a href="#">Using Avaya Experience Platform™ Public Cloud for Agents</a>	Web-based training
62520W	Using Avaya Experience Platform™ Public Cloud for Supervisors	<a href="#">Using Avaya Experience Platform™ Public Cloud for Supervisors</a>	Web-based training
ALEU-5025	Avaya Experience Platform™ Public Cloud End-User Training	<a href="#">Avaya Experience Platform™ Public Cloud End-User Training</a>	Web-based training
—	Avaya Experience Platform™ Public Cloud Deep Dive at <a href="#">Avaya Sales Portal</a> .	—	Web-based training This course requires SSO login.

## Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

## Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips.
- Information about service packs.
- Access to customer and technical documentation.
- Information about training and certification programs.
- Links to other pertinent information.

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to <https://support.avaya.com>.
2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.
3. Click **Product Support > Products**.
4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.
5. Select the release number, if applicable.
6. Click the **Technical Solutions** tab to view articles for resolving technical issues.

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## Resources for Avaya Experience Platform™ (On-Prem + Connect)

### Documentation

#### Related documents

Title	Available at:	Use the document to:	Audience
Overview			

*Table continues...*

<b>Title</b>	<b>Available at:</b>	<b>Use the document to:</b>	<b>Audience</b>
<i>Avaya Experience Platform™ Public Cloud Solution Description</i>	<a href="#">Avaya Experience Platform™ Public Cloud Solution Description</a>	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	<ul style="list-style-type: none"> <li>• Sales engineers</li> <li>• Business partners</li> <li>• Solution architects</li> <li>• Implementation engineers</li> </ul>
Deploying			
<i>Deploying Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Deploying Avaya Experience Platform™ (On-Prem + Connect)</a>	Prepare, install, and configure Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>• Implementation engineers</li> <li>• Account administrators</li> </ul>
Administering			
<i>Administering Avaya Experience Platform™ Public Cloud</i>	<a href="#">Administering Avaya Experience Platform™ Public Cloud</a>	Administer Avaya Experience Platform™ Public Cloud and Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>• Account administrators</li> <li>• Supervisors</li> </ul>
<i>Administering Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Administering Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</a>	Configure and administer the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>• Developers</li> <li>• CRM Administrators</li> <li>• Avaya Experience Platform™ Administrators</li> </ul>
<i>Configuring corporate contacts for Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Configuring corporate contacts for Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</a>	Configure and administer the features and capabilities of the Corporate Contacts widget in Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>• Sales engineers</li> <li>• Implementation engineers</li> <li>• Administrators</li> </ul>
Using			
<i>Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect)</a>	Use the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>• Agents</li> <li>• Supervisors</li> </ul>

Table continues...

Title	Available at:	Use the document to:	Audience
<i>Using Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Using Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</a>	Use the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>Agents</li> <li>Supervisors</li> </ul>
<i>Using corporate contacts in Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Using corporate contacts in Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</a>	Use the features and capabilities of the Corporate Contacts widget in Avaya Workspaces.	<ul style="list-style-type: none"> <li>Agents</li> <li>Supervisors</li> </ul>
Videos			
<i>Avaya Experience Platform™ (On-Prem + Connect) Application Center Administration</i>	<a href="#">Avaya Experience Platform™ (On-Prem + Connect) Application Center Administration</a>	Administer Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>Account administrators</li> <li>Supervisors</li> </ul>
<i>Using Avaya Experience Platform™ (On-Prem + Connect) for supervisors</i>	<a href="#">Using Avaya Experience Platform™ (On-Prem + Connect) for supervisors</a>	Perform supervisor actions using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>Account administrators</li> <li>Supervisors</li> </ul>
<i>Using Avaya Experience Platform™ (On-Prem + Connect) for agents</i>	<a href="#">Using Avaya Experience Platform™ (On-Prem + Connect) for agents</a>	Manage the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> <li>Agents</li> <li>Supervisors</li> </ul>
<i>Getting Started with Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect)</i>	<a href="#">Getting Started with Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect)</a>	Get an overview of Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect) and manage interactions.	All audiences

## Avaya Documentation Center navigation

For many programs, the latest customer documentation is available on the Avaya Documentation Center website at <https://documentation.avaya.com>. Some functionality is only available when you log in to the Avaya Documentation Center. The available functionality depends on your role.

### Important:

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- Click **Avaya Links** in the top menu bar to access other Avaya websites, including the Avaya Support website.
- Click **Languages** (🌐) in the top menu bar to change the display language and view localized documents.
- In the **Search Documentation** field, search for keywords and click **Filter** to filter by solution category, product, or user role.

You can select multiple items in each filter category. For example, you can select a product and multiple user roles.

- Click **Library** in the top menu bar to access the complete library of documents. Use the filtering options to refine your results.
- After performing a search or accessing the library, you can sort content on the search results page. When you find the item you want to view, click it to open it.
- Use the table of contents in a document for navigation. You can also click < or > next to the document title to navigate to the previous topic or the next topic.
- Click **Share** (➦) to share a topic by email or copy the URL.
- Download a PDF of the current topic in a document, the topic and its subtopics, or the entire document.
- Print the section you are viewing.
- Add content to a collection by clicking **Add to My Topics** (📁). You can add the topic and its subtopics or add the entire publication.
- View the topics in your collections. To access your collections, click your name in the top menu bar and then click **My Topics**.

You can do the following:

- Create, rename, and delete a collection.
- Set a collection as the default or favorite collection.
- Save a PDF of the selected content in a collection and download it to your computer.
- Share content in a collection with others through email.
- Receive collections that others have shared with you.
- Click **Watch** (👁) to add a topic to your watchlist so you are notified when the content is updated or removed.
- View and manage your watchlist by clicking **Watchlist** from the top menu with your name.

You can do the following:

- Enable **Email notifications** to receive email alerts.
- Unwatch the selected content or all topics.
- Send feedback for a topic.

## Training

The following courses are available for Avaya Experience Platform™ (On-Prem + Connect):

Course code	Course title	Delivery type
30050W	Consulting and Demonstrating Avaya Experience Platform™ (On-Prem + Connect)	Web-based Training
60440W	Administering Avaya Experience Platform™ (On-Prem + Connect)	Web-based Training
60450W	Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect) - Agents	Web-based Training
60470W	Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect) - Supervisor	Web-based Training

## Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

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- Information about service packs.
- Access to customer and technical documentation.
- Information about training and certification programs.
- Links to other pertinent information.

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to <https://support.avaya.com>.
2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.

3. Click **Product Support > Products**.
4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.
5. Select the release number, if applicable.
6. Click the **Technical Solutions** tab to view articles for resolving technical issues.

# Glossary

<b>After Contact Work</b>	After Contact Work (ACW) is an agent state that provides time for an agent to write notes about a completed interaction before Avaya Workspaces queues the next interaction. Account administrators configure the ACW time period in Application Center Administration.
<b>Agent ID</b>	A unique identification code for an Avaya Workspaces agent.
<b>Agent state</b>	A statement of the availability of agents. Agent states and state changes are visible to the agents and supervisors in Avaya Workspaces.
<b>Alerting</b>	A notification that informs the agents about incoming interactions in Avaya Workspaces.
<b>Allowlist</b>	A list of approved IP addresses, domains, or other entries for Avaya Experience Platform™ Public Cloud.
<b>Avaya Aura X for Avaya Cloud Office (ACO)</b>	A collaboration tool that provides advanced calling features, video conferencing, and chat support. Avaya Aura X for Avaya Cloud Office (ACO) users can also invite third-party experts to collaborate on a project.
<b>Avaya Spaces</b>	A cloud-based solution designed for team collaboration with access to a personal meeting room, direct messaging, and group spaces. Avaya Spaces integrates multiple forms of communication, such as voice calls, video conferencing, and chat.
<b>Avaya Workspaces</b>	A browser-based application through which contact center agents handle inbound customer interactions. Avaya Workspaces supports voice, email, chat, and messaging interactions.
<b>Barge in</b>	A feature that enables supervisors to provide advice to agents in Avaya Workspaces. When barging in, a supervisor joins an interaction between the agent and the customer as an active third party. After the supervisor barges into the interaction, the customer, agent, and supervisor interact in a three-way conference.
<b>Calculated metric</b>	In Analytics for Avaya Experience Platform™ Public Cloud, a formula for data in a report. An advanced user can add calculated metrics to a standard historical report. By default, each historical report shows a

standard set of metrics. Advanced users can add additional metrics to make compound calculations based on standard measures.

### **Carousel**

A type of interactive rich media message that features a number of horizontally scrolling images or panes. Carousel offers selectable options to an end customer. Custom development is required to build and show `.json` based rich media templates to agents on Avaya Workspaces. Using the custom built widget, agents can send carousel messages over the messaging channel.

### **Chat and messaging widget**

In Avaya Workspaces, an interaction widget that contact center agents use to work on messaging and social media messaging interactions. Agents can use this widget to exchange messages and media with customers.

### **Chat with corporate contacts**

In Avaya Workspaces, functionality to send messages to contacts and groups from the Chats and Groups tabs of the Corporate Contacts widget. The three types of chat are one-to-one chat, group chat, and conversation.

### **Coach**

A feature that enables supervisors to provide advice to agents. After observing an interaction, the supervisor can coach an agent in Avaya Workspaces.

### **Connectors**

A software connector that performs transfer of control, data among components, including but not limited to protocol and data conversion. They can also provide services, such as persistence, invocation, messaging, and transactions, that are independent of the interacting components functionality. The software connector acts as a proxy or wrapper around Avaya Experience Platform™ Public Cloud APIs that enable the underlying service to integrate with third-party providers and aggregators. While there are out-of-the-box connectors provided by Avaya as part of Avaya Experience Platform™ Public Cloud offering, customers can also build a custom messaging connector utilizing digital APIs to integrate Avaya Experience Platform™ Public Cloud with third-party gateways or providers.

### **Consult complete as conference**

A feature that enables agents to add another agent to their customer call after a consultation call in Avaya Workspaces.

### **Consult complete as transfer**

A feature that enables agents to transfer a customer call to another agent after a consultation call in Avaya Workspaces.

### **Consultation call**

A call that Avaya Workspaces agents and supervisors can make to other agents, supervisors, or corporate contacts to request assistance during a call with the customer. After the consultation call, the agent or supervisor can transfer the call with the customer to the consulted experts or create a four-way conference with the experts, customer, and themselves.

<b>Contact center</b>	A business division within an organization that manages customer interactions. Contact centers are also known as call centers. Contact centers use advanced technology to help resolve customer issues quickly, track customer interactions, and capture interaction and performance data.
<b>Contact Center as a Service</b>	Contact Center as a Service (CCaaS) is a software deployment model that enables companies to purchase only the technology they need. Another vendor hosts their software to reduce IT, integration, and support costs. Avaya OneCloud™ CCaaS is the former name of Avaya Experience Platform™ Public Cloud.
<b>Conversation</b>	In Avaya Workspaces, a message exchange between the members of a user group or a channel on the Groups tab of the Corporate Contacts widget. The provider administrator manages user groups and channels.
<b>Corporate Contacts widget</b>	A widget in Avaya Workspaces that provides access to Avaya Aura X for Avaya Cloud Office (ACO), Avaya Spaces, and Microsoft Teams corporate contacts. Agents and supervisors can use the Corporate Contacts widget to consult available corporate contacts.
<b>Cross-Origin Resource Sharing</b>	The Cross-Origin Resource Sharing (CORS) protocol enables the communication between platforms hosted in different domains, such as ServiceNow and Avaya Experience Platform™ Public Cloud, through an Application Programming Interface (API). CORS rules define the domains that can exchange the Representational State Transfer (REST) API requests with ServiceNow.
<b>Custom group</b>	In Analytics for Avaya Experience Platform™ Public Cloud, a data segmentation for historical reports. Account administrators can define a group based on common attributes, such as channel or queue. On a historical report, account administrators can show only the data that applies to a custom group.
<b>Custom metric</b>	In Analytics for Avaya Experience Platform™ Public Cloud, an additional measure in a report. An advanced user can add custom metrics to a standard historical report. By default, each historical report shows a standard set of metrics. Advanced users can add additional metrics to show more refined data.
<b>Customer identifier</b>	In Avaya Social Connections, a primary contact detail that uniquely identifies an end user. For example, when an end user sends a message to a WhatsApp business account, the phone number is the primary customer identifier of the end user.
<b>Customer Relationship Management</b>	Customer Relationship Management (CRM) is when a business or other organization administers its interactions with customers, typically using data analysis to study large amounts of information. CRM refers to all the processes and tools that manage customer relationships.

Salesforce, ServiceNow, and Microsoft Dynamics® 365 are examples of CRM software.

<b>Digital interaction</b>	<p>A type of interaction, which can be one of the following:</p> <ul style="list-style-type: none"><li>• Email with the customer's query</li><li>• Chat initiated on the web</li><li>• Social media messaging</li></ul>
<b>Digital Library</b>	<p>In Avaya Workspaces, a widget that consists of global templates and templates associated with agent queues. Account administrators can configure the templates in Application Center Administration. Agents can use Digital Library templates in messaging interactions with customers.</p>
<b>Disposition code</b>	<p>A label that the agents can attach to an interaction to describe or categorize it. Disposition codes are tags that help agents and other users summarize and flag interactions that require follow-up.</p>
<b>Events</b>	<p>In Automation and Orchestration, an event is a change during the routing of an Avaya Experience Platform™ Public Cloud interaction. Each event has a schema that contains data that the workflows use to make routing decisions.</p>
<b>Facebook account</b>	<p>A Facebook-related Meta business account of the customer. Account administrators can use a customer's Facebook account to set up their Facebook and WhatsApp social accounts on Avaya Social Connections.</p>
<b>Group chat</b>	<p>A chat with more than one corporate contact that Avaya Workspaces agents and supervisors can have on the Chats tab of the Corporate Contacts widget. Agents and supervisors cannot start a group chat, but they can send group chat messages to the chat groups that contacted them.</p>
<b>Inbound</b>	<p>A voice call, messaging, or an email initiated by an end customer and directed to a company's contact center. These incoming interactions are handled through automation and help desk agents in inbound contact centers. Inbound contact centers focus on providing high level customer service and efficient contact routing to reduce wait times.</p>
<b>Incoming connection</b>	<p>In Automation, an incoming connection provides information to a task. Each task has one incoming and at least one outgoing connection. An incoming connection can receive data passed to it from another task.</p>
<b>Integration</b>	<p>A concept that enables two or more software or components to work together and exchange data and capabilities. Avaya Experience Platform™ Public Cloud integrates with third-party applications and other Avaya products to expand its functionality. For example, Avaya</p>

Workspaces integrates with Salesforce to provide contact center features to enterprises with CRM software.

**Interaction**

A request for help from customers. An interaction can also consist of customer queries or sales inquiries. There are several types of interactions based on how customers request help. Customers can request help by the following channels:

- Email: Sending an email containing their query.
- Webchat: Initiating a chat on your website.
- Social media messaging: Messaging using Facebook, X (Twitter), and WhatsApp.

**\* Note:**

From March 1, 2025, Avaya does not support messaging integration with X (Twitter). You can no longer configure X (Twitter) social media accounts with Avaya Experience Platform™ or use X (Twitter) to send or receive messages to or from customers.

- Voice: Making a call using a WebRTC audio application.

**Interaction details**

A user interface element that enables agents to see details of an ongoing interaction in Avaya Workspaces for CRM.

**Internal extension call**

A type of phone call that agents and supervisors use for internal communication. For example, with an internal extension call, a supervisor can call an agent about the work schedule, or an agent can call the supervisor to discuss issues related to appraisal.

**Interval**

In Analytics for Avaya Experience Platform™ Public Cloud, a specific time period. When supervisors and account administrators generate reports to show contact center performance, they specify an interval, such as between 09:00 and 17:00. The report shows the performance for that time period.

**Layout**

An experience that Avaya Workspaces users receive when they are using the application. Layouts contain widgets and UI arrangements that are presented to agents or supervisors for each of the supported channels.

**Mapping**

In Automation, a mapping is a set of answers, with their variations, to questions. For example, the answer to a question could be yes or no. With a mapping table, the customer can provide a variation of an answer and it is still valid in the flow. A strong mapping has variations of the answer, including colloquial words, such as yes, yeah, yep, y, and so on.

**Metric formula**

In Analytics for Avaya Experience Platform™ Public Cloud, a calculation performed on any data in the contact center database. Metric formulas

are the objects and operators that make up those calculations. Analytics for Avaya Experience Platform™ Public Cloud includes some common calculations, and advanced users can create their calculations.

<b>Microsoft Teams</b>	A business messaging and collaboration platform that provides access to channels and teams, direct messaging, and group chats. Microsoft Teams also integrates with other Microsoft 365 platforms, including Dynamics 365 applications.
<b>Microsoft Teams channel</b>	A type of user group that exists in Microsoft Teams. Agents and supervisors can see the list of available Microsoft Teams channels and users on the Groups tab of the Corporate Contacts widget in Avaya Workspaces.
<b>Outbound</b>	An adhoc outgoing voice call or an email initiated by a contact center agent to the end customer. The members of a sales team or customer service representatives make these interactions to customers.
<b>Outgoing connection</b>	An output connection of a task in Automation. You can use the task output as an input to another task.
<b>P-Intrinsics</b>	In Automation, a SIP header with a hex encoded string in the format name=value pairs about the session. The applications that receive a SIP header may process the information differently to Automation.
<b>Pop-out</b>	A presentation of the external web pages provided by a screenpop that agents can use for completing tasks. For example, agents can view external websites with the information on current currency exchange rates.
<b>Postback</b>	A type of interactive rich media message that enables an end customer to click a button to send a response or selection. Custom development is required to build and show <code>.json</code> based rich media templates to agents on Avaya Workspaces. Using the custom built widget, agents can send postback messages over the messaging channel.
<b>Producer</b>	In Analytics for Avaya Experience Platform™ Public Cloud, a collection of measures to provide real-time contextual data to Avaya Workspaces supervisors and account administrators. Analytics for Avaya Experience Platform™ Public Cloud provides the following producers to Avaya Workspaces for use in real-time reporting dashboards: Agent, AgentByChannel, AgentByQueue, Channel, DialogDetail, Group, Queue, and QueueByChannel.
<b>Profiles</b>	In Application Center Administration, a collection of configuration settings assigned to a user. In Avaya Experience Platform™ Public Cloud, account administrators create a profile at an account or an account hierarchy level and assign it to users, such as agents and supervisors.

<b>Provider for corporate contacts</b>	A third-party application that Avaya Experience Platform™ Public Cloud integrates with, such as Avaya Aura X for Avaya Cloud Office (ACO), Avaya Spaces, or Microsoft Teams. Agents and supervisors can see the provider contacts available for consulting on the corresponding tab of the Corporate Contacts widget.
<b>Redirection on No Answer</b>	Redirection on No Answer (RONA) is a feature for redirecting a call after an administered number of rings. RONA prevents an unanswered call from ringing indefinitely.
<b>Report type</b>	In Analytics for Avaya Experience Platform™ Public Cloud, supervisors and account administrators obtain data on the performance of contact center agents using three types of reports. Real-time reports provide information about current activity. Historical reports provide information about past activities. Historical dossiers provide information about past activity with interactive graphics.
<b>Representational State Transfer API</b>	A Representational State Transfer (REST) API is a set of rules that enables different software applications to communicate over the web. A REST API uses standard web protocols, making it widely used for sharing data and functionality in web development.
<b>Restricted account</b>	A locked account is the result of disciplinary action from Facebook after the account holder violates its community standards or policies. The nature of the restriction depends on the infraction, ranging from temporarily stopping users from commenting on posts to a full account lockout.
<b>Retrieve credentials</b>	In Avaya Social Connections, an action that account administrators perform while creating or managing social media accounts. For example, when account administrators add a Facebook or WhatsApp social account on Avaya Social Connections, they use this option to complete the authentication process with the social media provider.
<b>Roll-up</b>	A form of time-based data aggregation in Analytics for Avaya Experience Platform™ Public Cloud. When supervisors and account administrators generate reports to show contact center performance, they can show daily or monthly data. This data is also referred to as roll-up data.
<b>Routing rules</b>	In Orchestration, workflow routing is based on rules. You can use rules to initiate a workflow based on the information in incoming events.
<b>SAML</b>	Security Assertion Markup Language (SAML) is a protocol that enables you to access multiple web applications using one set of user credentials. Avaya Experience Platform™ Public Cloud supports the standard browser redirect-based SSO using the SAMLv2 protocol.

<b>SAML Identity Provider</b>	A system entity that issues authentication assertions in conjunction with a single sign-on profile of SAML.
<b>Self service</b>	In Automation, a self-service flow is one where the caller does not interact with an agent. Self-service flows collect information for queues, attributes, and customer identification.
<b>SLA</b>	Service Level Agreement (SLA) is an industry term that defines a level of service you expect, with the metrics by which the service is measured, and remedies or penalties should agreed-on service levels not be achieved. It is a critical component of any technology contract.
<b>Softphone</b>	A telephony application that is installed on a computer.
<b>Station ID</b>	A unique identifier that displays the internal extension number assigned to a voice enabled agent.
<b>Supervisor dashboard</b>	A screen that enables supervisors to monitor agents. Supervisors can view a list of agents and the information about the state and interactions of an agent, use filters to search agents in a team, end sessions, disconnect calls, and broadcast messages. From the supervisor dashboard, supervisors can also observe, coach, and barge into chat, messaging, and voice interactions.
<b>Task output</b>	An output connection of a task in an Orchestration workflow. It is a visual representation of how the workflow will progress. You can use a task output as an input to another task.
<b>Threshold</b>	A level of service in Analytics for Avaya Experience Platform™ Public Cloud. Below this level, contact center customers do not receive a satisfactory response. Above this level, customers have a positive experience. Supervisors and account administrators can add a threshold to each measure in a real-time report. For real-time reports, this functionality is called Thresholds Classes. For historical reports, account administrators can also assign thresholds to more accurately manage Service Level Agreements (SLAs).
<b>Threshold class</b>	In Analytics for Avaya Experience Platform™ Public Cloud, an assignment of thresholds to measures in Avaya Workspaces for real-time reports.
<b>UX Profiles</b>	In Application Center Administration, UX profiles contain a number of settings that manage user experience in Avaya Workspaces, including the Avaya Workspaces layout. UX profiles are selected as part of user profiles which are used when creating users in Avaya Experience Platform™ Public Cloud.

<b>Voice interaction</b>	A voice interaction is a phone call from customers in Avaya Workspaces. Avaya Experience Platform™ Public Cloud voice services provide the functionality to route and control voice interactions.
<b>Wait treatment</b>	A message or audio that the customer receives while they are in the queue waiting to be connected to an agent.
<b>WhatsApp business account</b>	A WhatsApp business platform account that represents the customer's business. Customers can use their WhatsApp business accounts to create a WhatsApp social media account on Avaya Social Connections.
<b>WhatsApp template</b>	A message format in WhatsApp that agents can use to engage in marketing, utility, and authentication conversations with customers. Agents can use plain text, button, macro, or media template types.

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