Understand your Agent Desktop user interface

Welcome to the new Agent Desktop user interface. When you sign in, the homepage displays custom or persistent widgets based on the layout configuration that is configured by your administrator. To learn more about how to sign in, see Sign in to Agent Desktop.

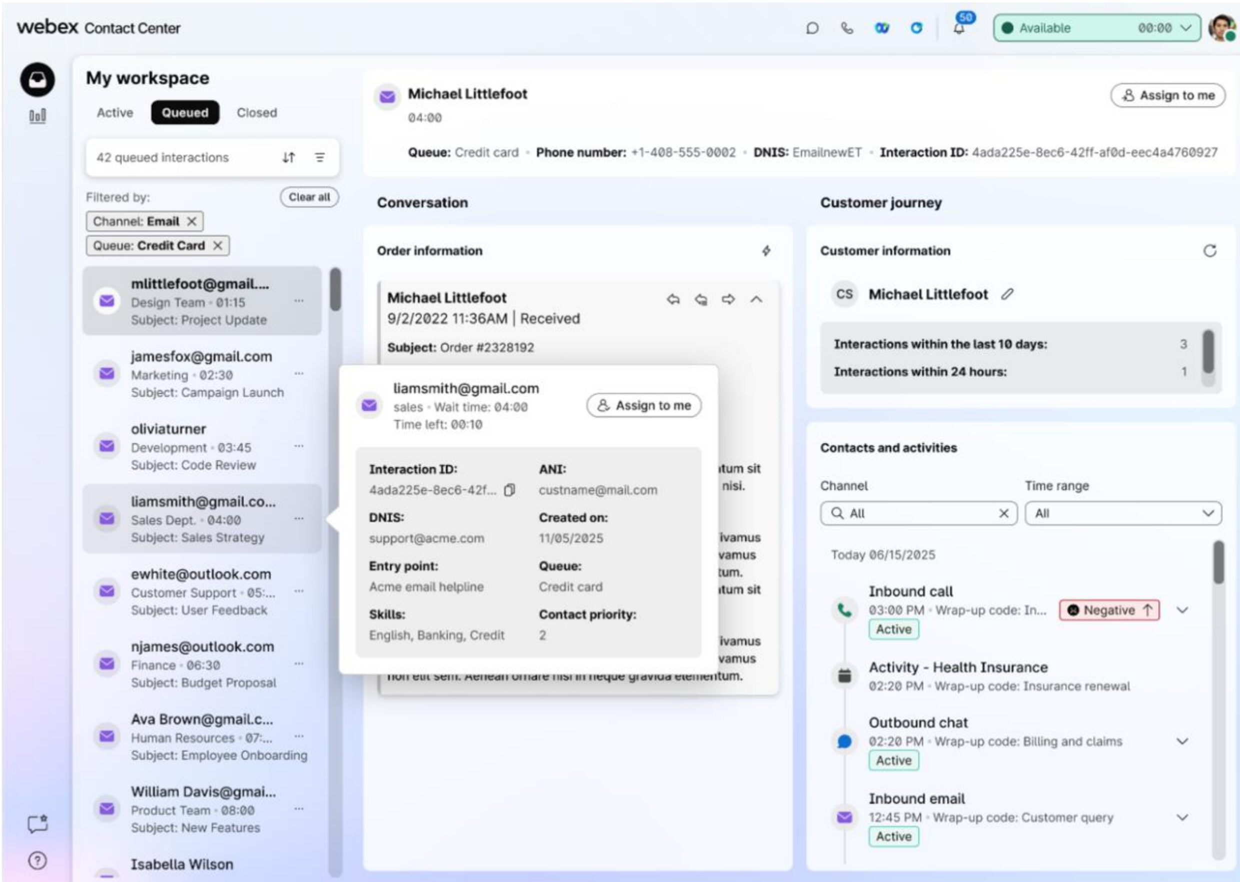
Note:

Agent Desktop automatically adjusts to different screen sizes but the display size must be greater than 500 x 500 pixels (width x height). Set your web browser zoom to 100% for the optimum experience. To learn more about supported browser versions, see System requirements for Webex Contact Center.

Agents can switch off the new UI through Settings; however, all the features listed below are only available in the new UI. Therefore, it is recommended to use the new UI.
Once enabled, you can disable the new UI by going to Settings → Switch to New Look. Note that this option will no longer be available after 60 days.

- Enhanced Sign-In and Station Credentials
- Updated Task List and Details pane
- Enhanced consult & transfer modals
- Enhanced collaboration during consult calls
- Schedule callbacks - Inbound and manual outbound
- Outbound interactions: Digital and campaign enhancements

Here is the snapshot of the new look of the Agent Desktop interface:



Task List pane

The refreshed Desktop user interface features an improved Task List pane, allowing you to view all interactions through the following tabs:

- **Active**: Displays all ongoing and currently active interactions. It shows key data fields including call type, customer phone number, DNIS, queue, and elapsed time. You can accept and view incoming requests and view the initiated outgoing requests in the Active task list and start communicating with the customer.
  - **Handle interactions**: Accept only one voice call at a time (excluding consult calls), but you can handle both a digital interaction and a voice call simultaneously from the Active task list.
  - **Search and Sort interactions**: Use the search bar to find specific interaction(s) in the Active task list. Click the **Sort** icon next to search bar to organize the task list by Recently assigned, Newest message, Longest wait, or Customer name (A–Z).

- **Closed**: Presents a chronological log of recently completed interactions across all channels, with details such as customer name, email, task duration, and wrap up code.
  - **Search and Sort interactions**: Use the search bar to find specific interaction(s) in the Closed task list. Click the **Sort** icon next to search bar to organize the task list by Recently assigned, Newest message, Longest wait, or Customer name (A–Z).
  - **Edit customer information**: Hover over and click the **Edit** icon to update the customer phone number associated with the task before initiating an outbound interaction with the customer.
  - **Initiate outbound call**: Hover over the customer phone number from the Closed task list and choose **Click to Call** to initiate an outgoing interaction with the customer.

By default, the Task List pane is expanded. If the Task List pane is collapsed, you can see a popover at the bottom-right corner to accept the interaction request. If you get multiple requests, the latest interaction is displayed at the top of the **Queued** tab, and the order is calls, chats, social messaging conversations, and emails. Once you assign the tasks, you can see them in the **Active** tab.

> **Note:**
>
> If sensitive data protection is enabled for your desktop, then ANIs, DNIS (for outgoing calls), email addresses will remain masked.

Details View panel

- **Interaction control pane**: For any task in the Active, Queued, and Closed task list pane, the interaction control pane appears at the top center.
  - During any active interaction, the interaction control pane displays customer information, connected timer, control buttons, and more.

- **Schedule Callbacks**: You can schedule both inbound and manual outbound callbacks directly from the desktop during a live interaction or even in a wrap-up state. You can configure callback details such as customer name, desired time (from 30 minutes to 30 days), time zone, callback number, and queue name. This provides greater flexibility in managing customer follow-ups and proactive outreach,

  - For any queued interaction, you can see customer information and assign the task to yourself from the interaction control pane.
  - For any completed interaction, the interaction control pane displays customer information, queue name, and other interaction details.

Note:

The personally identifiable information (PII) will remain masked in the interaction control pane, if sensitive data protection is enabled for your Desktop.

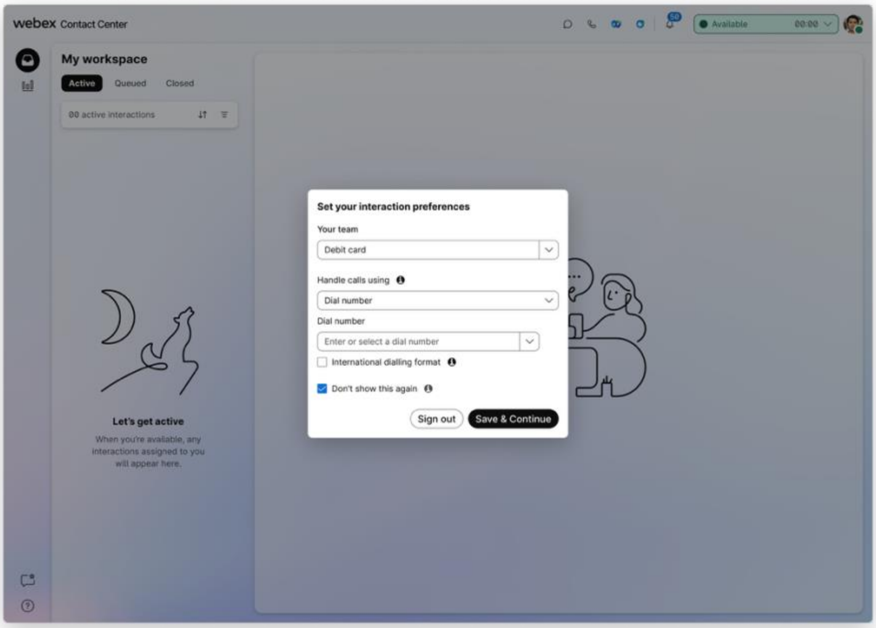
- **Conversation widget**: View conversation transcripts (live or IVR) for any Voice, Email, Chat, or Social interaction selected from the Task List pane.

  For any queued interaction, you can preview conversation transcripts in read-only mode before picking up a task, providing crucial context for efficient handling.

  For any active voice interactions, you can see the conversations in the **IVR transcript** and **Live transcript** tabs.
  The **IVR transcript** tab allows you to view the conversation between the virtual assistant and the customer (caller). The widget is displayed only if your administrator has configured the widget for you.

Sign in to Agent Desktop

Use Webex Contact Center Desktop to seamlessly connect to your customers. The insight and collaboration tools for agents help you better meet your business goals. Use these steps to sign in.



Sign in (tab)

When you sign in to Agent Desktop, the appearance depends on how the Webex Contact Center administrator has configured the layout. The Agent Desktop display size must be greater than 500 x 500 pixels (width x height). You must set your web browser zoom to 100% for the best experience with Desktop.

Before you begin

- Ensure that your phone is ready to receive calls.
- When you open Agent Desktop for the first time or when the cache is cleared, it can take a few seconds to load, depending on network speed and availability. If it fails to load, an error message appears, and you can share these details with your administrator.
- You can’t access the Agent Desktop on multiple browsers or multiple tabs of the same browser window. A prompt message displays if you sign in to multiple instances, and switch between browsers or tabs. Click Continue in the prompt message to sign in on that browser window.

If you click Continue while you're on a call, the interaction control pane takes a few seconds to load.

1. In the address bar of your browser, enter the URL provided by your administrator.
2. Enter your email address and click Sign In.
   To change the selected email address, press the Alt+Left arrow (Windows) or Command-Left arrow (Mac).
3. Enter your password and click Sign In.
   To retrieve a forgotten password, click Forgot Password, and enter the six-digit confirmation code sent to your email address.
   If your administrator configures the default Dial Number (DN), the default DN is prepopulated in the Dial Number and Extension fields.
   If your administrator restricts the DN to the default DN, you cannot edit the prepopulated DN when signing in to the Agent Desktop. The Dial Number and Extension fields are read-only. In this scenario, skip step 4 and step 5.
4. (Optional) Enter your email address and password to authenticate and sign in to your Microsoft Teams account. This step is valid if your administrator has not enabled Azure SSO authentication for your organization.
   - Microsoft Teams authentication window will not appear if your administrator has enabled Azure SSO authentication for your organization.
   - If you cancel the authentication or if the authentication fails, a warning icon and a notification message displays. You can authenticate through profile settings after signing into the Desktop. For more information, see Troubleshooting.
5. In the **Station Credentials** section, choose your calling preference from the **Handle calls using** drop-down list. The options displayed (**Desktop**, **Extension**, or **Dial Number**) are dynamically shown based on your user profile configuration.
   - **Desktop**: Select this option if you are using WebRTC (Web Real-Time Communications) as a calling capability. This option uses your browser to handle voice interactions and requires no further input.
   - **Extension**: Select this option if you are using a Webex Calling extension. Enter your extension number.
     For Webex Calling organizations, if you have multiple extensions configured, select your extension from the drop-down list of pre-validated extensions. If your profile includes a single configured extension, it is automatically pre-filled.
     When you select an Extension (from the drop-down for Webex Calling users), the system displays information about the devices currently registered to that extension, including their online/offline status.

  - **Dial Number**: Select this option if you are using a Dial Number.
    Enter the phone number you use for inbound and outdial calls.
    For Webex Calling organizations, if you have multiple dial numbers configured, select your number from the drop-down list of pre-validated numbers. If your profile includes a single configured dial number, it is automatically pre-filled.
    To use international dialing, check the **International dialing format** checkbox. Choose the country code based on your geographical location from the drop-down list and enter only the phone number. The supported format is: Country code format: + [Country Code] [Phone Number] . For example, <+120> 15532447.
    To use another dial number format, uncheck the **International dialing format** checkbox. Enter the dial number. The supported formats are: E.164 number format: [+][Country Code][Number] . For example, +11234567890 or IDD (International Direct Dialing) format: [IDD][Country Code] [Number] . For example, 01161123456789.

  The system performs real-time validation on manually entered dial numbers and extensions, providing immediate feedback for incorrect formats or invalid inputs. Specifically for Webex Calling users, a comprehensive backend validation check is executed during the sign-in sequence. This validation confirms that the selected or entered **Dial Number** or **Extension** is correct and successfully registered to an active device or an application before you are transitioned into an **Available** state.

6. (Optional) Check **Don't show this again** to enable auto sign-in for future sessions, bypassing the **Station Credentials** screen on future sign-ins. Your station details are saved in your browser preferences regardless of whether this checkbox is selected. You can disable auto sign-in anytime from **Profile Settings** to resume seeing the **Station Credentials** screen.
   Note: If an automatic sign-in attempt (when **Don't show this again** is checked) fails (for example, if the previously used Dial Number is no longer valid or is currently in use), the system will revert to displaying the **Station Credentials** screen, pre-populated with your saved preferences, allowing you to review and correct the details.
   The Default DN configured by your administrator is displayed as a placeholder. If you have saved sign-in preferences, these saved preferences will take precedence over the configured Default DN during the sign-in process.
7. Choose your team from the Team drop-down list, or use the search field to filter the list.
8. Click **Save & Continue**.

If you checked **Don't show this again**, you may see a message that your credentials weren't saved. In this case, enter your details when you sign in again.

The task page appears upon successful sign-in. Your administrator can configure the task page to display an illustration as a background when you sign in. If the illustration isn't configured, the task page appears with blank background.

What to do next

When you're ready to sign out, change your availability state to Idle, click the User Profile at the top-right corner, and click Sign Out. You can't sign out if you are in an active conversation or in an ongoing monitoring task.

Troubleshooting (tab)

- **Sign-in issues**: If you can't sign in to Desktop, ask your administrator to review the following:
    - Are your tenant, profile, skill, or agent permissions and settings correct?
    - Are there network or API issues?
- **Browser reload**: If you can't restore your session due to a connection failure, session expiry, or local storage issues, reload your browser to refresh your session.
- **Banner message**: A message appears as a banner at the top of the Desktop informing you that some features aren't available. When your administrator resolves the issue, reload your browser. When you reload the browser, the banner is removed, and all features are available.
- **RONA state**: If you selected Desktop but do not have browser permissions, you may see a message asking you to enable access through browser settings or contact your administrator. If you've accepted E911 notifications but are still unable to connect using desktop telephony, your state might be set to RONA. Contact your administrator to resolve this issue, by sharing the Tracking ID. The enhanced sign-in validation and device registration checks performed during the sign-in process helps prevent RONA occurrences caused by selecting an invalid or unregistered Dial Number or Extension.
- **Microsoft Teams authentication**: Follow these steps to complete user authentication for Microsoft Teams.
    1. Click the Profile icon.
    2. Click Try Again for user authentication under Collaboration Tools – Microsoft Teams in Profile Settings.

    The user authentication status changes to Successful when authenticated.

- Known issue: Sign-in error with empty team selection: When signing in, if you select a team from **Your team** drop-down list and then clear the selection, the **Save & Continue** button remains enabled. Clicking **Save & Continue** with no team selected will result in a login error. To successfully sign in, ensure a valid team is selected before clicking **Save & Continue**.