Finesse Agent Quick Reference Guide

Log into Finesse

(1) Access the University at Albany Finesse website: https://cucm-cx-p101.uc.albany.edu:8445/desktop
(2) Your NetID may auto populate. If not, enter it in the first field of the form.
(3) Enter the password you use with your NetID.
(4) Enter the extension of the phone you will answer.
(5) Click the “Sign In” button.

Finesse Agent Interface

- Make yourself “Ready” or “Not Ready” to take calls
- Change your page view by selecting the tabs on the left side of the page.
- Current stats (calls holding in queue, how long the calls have been holding) for the queue.
- Status of all Agents on your team.
Make Yourself Ready

(1) When you log in your status is set to “Not Ready” by default.
(2) When you are ready to take calls, click the drop down next to the “Not Ready” status at the top of the interface.
(3) Choose “Ready”. You will now be sent calls as they come into the queue.
(4) To take yourself out of the queue (calls will not ring to you), choose “Not Ready” from the same drop down.

*NOTE* You must make yourself “Not Ready” before logging out of the application.

Incoming Calls

Once you log in to the queue and choose “Ready”, calls will ring to you and the other Agents on your team. Incoming calls will “pop up” in the bottom right of Finesse and display the caller’s information (as available).

Click the “Answer” button or pick up the phone receiver to take the call.

If you do not answer the call within 20 seconds (3 rings), your status will change from “Ready” to “Call Not Answered”. You will need to click the drop down and select “Ready” in order to receive calls from the queue.
Finesse Interface While Talking

When you are on a call, your status will change to “Talking” and no additional calls will ring to your phone.

The top of the Finesse interface will change to display available options while you are on an active call.

Options available while you’re on a call include:

Keypad

A caller placed on “Hold” will hear the University’s hold music. When you’re ready to retrieve the call, click the “Retrieve” option on the call interface.
Direct Transfer (Cold Transfer)

To transfer a call directly to another person/department, click the “Direct Transfer” option, enter the digits of the extension/phone number the caller should be sent to, then click the green “Direct Transfer” button at the bottom of the dial pad.
Consult

To do a consult, click the “Consult” option at the top of the interface. Enter the digits of the phone number you wish to consult with. Click the green “Consult” button at the bottom of the dial pad.

Options When in Consult

When you opt to Consult with a colleague or manager, you have additional options within the Consultation. These include the ability to retrieve the caller, transfer the caller to a new destination, or to conference you, the caller and the person you called to consult with into the call.

If you choose “Conference” a notification of how many people are on the call shows in the upper left of the Finesse interface.
End Call

To end a call, either hang up your phone receiver or click the “End Call” button on the right side of the Finesse interface.

Access the Dial Pad

When you are logged in, the option to dial calls from your computer is in the upper right corner of the interface.

Click the dial pad icon and you can type, click, or paste a phone number into the dial field. Select “Enter” to dial the number.

Left Hand Tabs

Three tabs on the left side of the interface allow you to view different aspects of your activity within Finesse.

**Home:** The default view when you log into Finesse. Shows how many calls are in queue, how long each call has been waiting, as well as information about the status of each Agent on your team.

**My History:** View your Recent Call and Recent State history for the day.

**My Statistics:** View your average talk and hold time, as well as the amount of time you have been “Ready,” “Not Ready,” and in “After Call Work” modes.
Log Out of Finesse

1. Click the drop down next to “Ready”.
2. Choose “Not Ready”.
3. Click the drop down next to the person icon, choose “Sign Out”.
4. Confirm your desire to sign out and close your web browser.