



# Genesys EchoContact User Guide

Genesys EchoContact version 3.3

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# Getting Started with Genesys EchoContact 3

This section of the User Guide introduces the functionality of Genesys EchoContact 3.

## EchoContact 3 Standard Features and Capabilities

The features available on the Genesys EchoContact 3 soft phone will vary, depending on configuration in Genesys EchoSystem Manager.

Feature	Description
Routed Calls	Skills-based calls are routed to “ready” agents.
Time Tracking	All the phases of an agent’s time are tracked. Logged in, Ready, Not Ready Reason, and call time tracked.
Auto Answer Toggle	Incoming calls are automatically answered. Caller Detail will automatically launch an alert regarding incoming calls. Auto Answer feature can be toggled off and on as needed.
Customizable	Features and screen configurations are set in Genesys EchoSystem Manager.
Dial Out	Outgoing calls can be placed from the soft phone. Calls can be dialed on a keypad, made from a speed dial list, or returned from a recent calls list.
Redial List	Calls can be placed from a Redial List. The Redial List can be cleared, as needed.

Feature	Description
Call Handling	<ul style="list-style-type: none"><li>• Transfer</li><li>• Hold</li><li>• Conference</li><li>• Swap</li><li>• Release</li><li>• Disposition</li></ul> <p>Calls can be transferred, conferenced, put on hold, and retrieved from these states.</p> <p>Agents may “swap” between two active calls.</p> <p>Agents may be prompted to enter a call disposition upon call termination. At the end of a call the Disposition Voice Call screen will display.</p>
Software Phone Interface	Use as you would with any software program. No extra hardware or other resources required.
Integrated	Soft phone windows application works with hardware phone for complete service option.
Change Password	Agent-based password maintenance.
Speed Dial	Agents maintain and create speed dial lists.
Recent Interactions	Table of historic Incoming Call information. Calls can be dialed from the table.
Queue Information	Agents can view call queues from the soft phone.
Preferences	Agents can set soft phone preferences, such as placing the soft phone ‘on top’ of other applications or setting custom ring notifications.
LCD Display	Depending on configuration, information on the call and customer display here.
Interactions	The number of phone calls, incoming outgoing, placed in this session. (A session is one day.)

Feature	Description
Virtual Keypad	Click (or use your numeric keypad on your computer keyboard) to place calls.
Voicemail	Voicemail is routed to the agent in the form of a screen popup and a chime played on the hard phone.

## Logging into Genesys EchoContact 3

Genesys EchoContact 3 must be installed on your computer and started from an icon, just like any other software program. After you run the program, you must log in.

### First Time Login



Login Window	Field
User Name	Format of user name: first name initial, last name initial, employee id. Example: jm123456. <b>Note:</b> Administrators are the only users permitted to create user names in the Genesys EchoSystem Manager tool. An agent must have a valid user name in order to interact with Genesys EchoContact 3.
Password	Supplied by system administrator.
Client	Supplied by system administrator.

The log in screen below displays the first time you run Genesys EchoContact 3.

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When you select the **Save Login** option, Genesys EchoContact 3 remembers your last desk and login information. When the Login Box is displayed in the future, clicking **OK** to login is all that is required.

**Note:** The **Saved Login** option is active on the current desk that you are logged into. If you move to another desk this option is not turned on but your last extension is remembered.

Login Window	Function
Back	Go back to initial login screen.
OK	Enter the login information and log in to Genesys EchoContact 3.
Cancel	Do not log in, closing the window.
Login	Enter the login information and log in to Genesys EchoContact 3.

Genesys EchoContact 3 is password protected and requires configuration information that must be provided by your supervisor. After logging in, the Genesys EchoContact 3 screen displays. It shows your name, extension, and status.

Follow these steps to login to Genesys EchoContact 3. Begin this procedure from your Windows screen.

1. Select **Start > All Programs > Echopass > EchoContact 3 > EchoContact 3**.  
*The **Genesys EchoContact 3** login screen displays.*
2. Enter username, password, and client and click **OK**.  
*The **User desk** dialog displays.*

3. Select **Desk** and click **OK**.  
*Genesys EchoContact 3 displays.*

## Logging in at Another Agent's Desk

If an Agent sits at a desk other than their own, they must change the Login to their own Login ID and select the hard phone extension from the list of extensions currently not in use. If an Agent is logging in to Genesys EchoContact 3 from a desk other than their own, they must select the phone extension of the hard phone at that desk. If the Agent inadvertently selects the wrong extension, the customer cannot be heard.

**Note:** See [Changing the Genesys EchoContact 3 Password](#) for more information on password options and rules.

**Note:** If an incorrect password is entered three times in a row, the soft phone locks out. A system administrator can clear a lockout.

**Note:** Once you log into an extension, that extension is no longer available and does not display in the drop down.

## Getting to Work

The two status buttons, **Ready** and **Logged In**, indicate the current status of Genesys EchoContact 3. Their colors change to red or yellow to indicate whether or not you are *Not Ready* or *Logged Out*, or green, to indicate whether you are *Ready* or *Logged In*.

## Status in Genesys EchoContact 3

The Genesys EchoContact 3 Status button indicators display one of the following states:

*Logged Out.* The **Logged Out** button displays, indicating that you are not accumulating login time and that no interactions can take place. You should be logged out for breaks and lunch breaks.

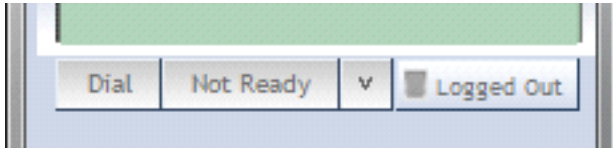
*Ready.* Both buttons are green, indicating that you are accumulating login time.

*Not Ready.* The **Not Ready** button displays a Not Ready Code for the reason the agent is not available.

**Note:** Yellow *Not Ready* status occurs if one of the media buttons at the bottom of Genesys EchoContact 3 is *Ready* and the other is *Not Ready*. In this case, the user is not fully available to make or receive calls, or interact with customers. Also, the number of media buttons in your instance of EchoContact depends on the configuration set by your Administrator.

## Soft Phone Initial Display

After you log in, the status buttons look like the figure below. Click to log in, and then click to become *Ready*, in order to use Genesys EchoContact 3.



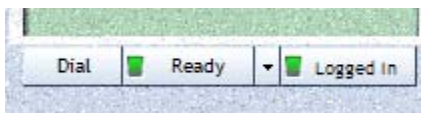
### Click to Log In

Click the **Logged Out** button, to turn it green and change status to **Logged In**, as demonstrated in the figure below. The **Not Ready** button displays.



### Click to Go Ready

Click the **Not Ready** button to change status to *Ready*. The button changes to green, and displays "Ready".



You must be "Ready" indicating that you are *Logged In* and *Ready* to receive calls.

Follow these steps to go "Ready":



1. Click the **Logged Out** button. The button switches to green, and reads *Logged In*.
2. Click the red **Logged In** button. The button switches to green, and reads *Ready*.

You are now *Ready*. Both buttons are green, indicating that you are accumulating login time and are now able to receive and make calls.

# The Genesys EchoContact 3 Interface

Genesys EchoContact 3 allows agents to communicate with customers. Through its simple interface, Genesys EchoContact 3 allows you to receive routed voice calls. You can also use Genesys EchoContact 3 to place outbound phone calls.

## Using the Handset or Hard Phone

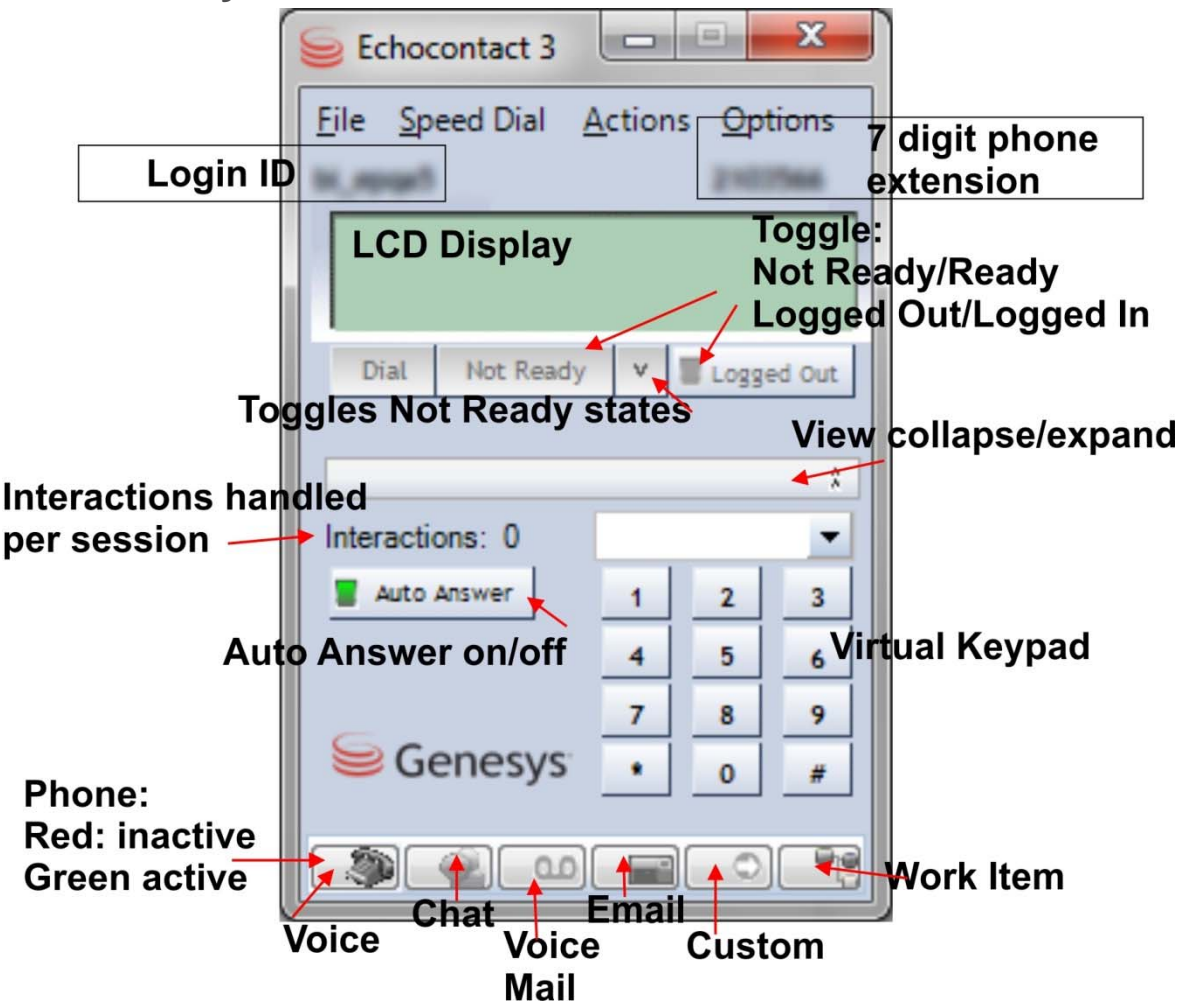
The hard phone is the hardware phone that Genesys EchoContact 3 connects to (the phone sitting on your desk). Since your phone is controlled by Genesys EchoContact 3, you should not need to touch your phone for most of your daily work. The only times you need to touch your phone are when you need to adjust the volume or input numbers into an Interactive Voice Response (IVR) or voice menu system.

The extension on your phone is the extension that displays on the Genesys EchoContact 3 interface (see [The Genesys EchoContact 3 Soft Phone Interface](#)).

**Note:** If for some reason you must use the hard phone to dial out, the 91 dial out numbers are required.

**Note:** Genesys advises that agents use Genesys-recommend headsets instead of the handset for voice calls.

# The Genesys EchoContact 3 Soft Phone Interface



The above figure shows the parts of the soft phone interface. Your screen may differ, based on how the soft phone is configured. The interface also changes as differing functions become available. (For example, **Swap**, **Conference**, and **Transfer** buttons display when those functions are available.)

## Interface Description

Genesys EchoContact 3 Interface	Purpose
Name	User name of logged-in agent.
LCD Display	Depending on configuration, information on the call and customer displays here.

Interactions	The number of phone calls, incoming or outgoing, placed in this session. (A session is one day.)
Phone Icon	Toggle to choose mode. When red, Genesys EchoContact 3 is <i>Not Ready</i> . When green, calls may be received and placed.
Virtual Keypad	Click (or use your numeric keypad on your computer keyboard) to place calls.
Recent Calls	A list of recent calls is available on this drop down.
Collapse the View	Allows you to hide the virtual keypad but still display Genesys EchoContact 3.
Extension	The extension of the IP phone that Genesys EchoContact 3 is logged into.
Menu Bar	Click to access Genesys EchoContact 3 program features.
Toggle	These two buttons control the status of Genesys EchoContact 3.

## **Polycom® SoundPoint® IP 450**

We recommend the Polycom SoundPoint IP 450 phone for use with Genesys EchoContact 3.



The above image demonstrates how the extension number is displayed in the LCD window.

- Mid-Range SIP desktop phone with Polycom HD Voice™ and high-resolution, backlit display
- Revolutionary voice quality with Polycom HD Voice™
- High-resolution backlit LCD with support of multiple languages and Asian characters
- Fully enabled to run the Polycom Productivity Suite
- Three lines for a moderate volume of calls

## **Polycom® SoundPoint® IP 550**

We recommend the Polycom SoundPoint IP 550 for use with Genesys EchoContact 3.



The above image demonstrates how the extension number is displayed in the LCD window. This should match the extension in the soft phone.

- Four-line manager's phone
- Revolutionary voice quality with Polycom HD Voice technology
- Cutting-edge SIP features
- Backlit, easy-to-read LCD with support of Asian characters
- Interoperability with leading SIP-based IP PBX and Softswitch platforms

## Handling Calls

This section describes how to handle calls with Genesys EchoContact 3.

### Answering Calls with Genesys EchoContact 3

Auto answer and delays are configured in the **Agent Workgroup** settings of EchoSystem Manager by your system administrator.

If your soft phone is not configured for **Auto Answer**, please skip to Manually Answering the Call.

#### Automatic Call Answering

**Auto Answer** feature is configured.

In order to receive calls, you must be logged into Genesys EchoContact 3 and connected to a valid phone extension. The soft phone must also be in a **Ready** state to receive routed calls.

If a call answer delay is configured on an inbound call, the **Dial** button changes to *Answer* and the information about the caller is displayed. The call answers automatically after the preset delay. You may also answer the call before the preset time delay.

If there is no call answering delay, the call answers automatically. Auto Answer and delays are configured in the **Agent Workgroup** settings of Genesys EchoSystem Manager.

Once the call is answered, the Genesys EchoContact 3 buttons change and the call timer begins counting. Customer information for the caller displays.

Follow this step to answer a call:

1. Click the **Answer** button to pick up the call or, wait and the call answers automatically (if this feature is configured in the Genesys EchoSystem Manager).

#### Manually Answering the Call

**Auto Answer** feature is not configured.

In order to receive calls, you must be logged into Genesys EchoContact 3 and connected to a valid phone extension. The soft phone must also be in a *Ready* state to receive routed calls.

Click the **Answer** button to pick up the call.

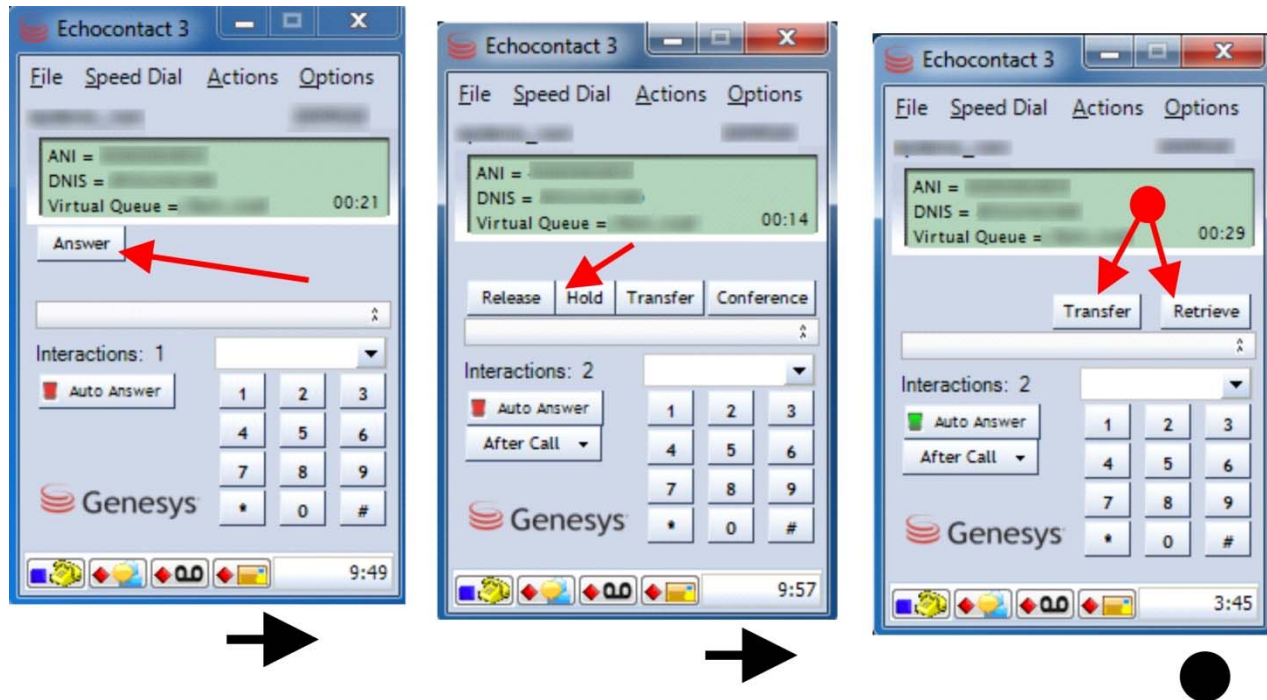
Once you answer the call, the Genesys EchoContact 3 buttons change and the call timer begins counting. Customer alerts and screen pop-ups for the caller display.



## Call Procedures

Agents can handle calls with the following options:

### Place the Customer on Hold

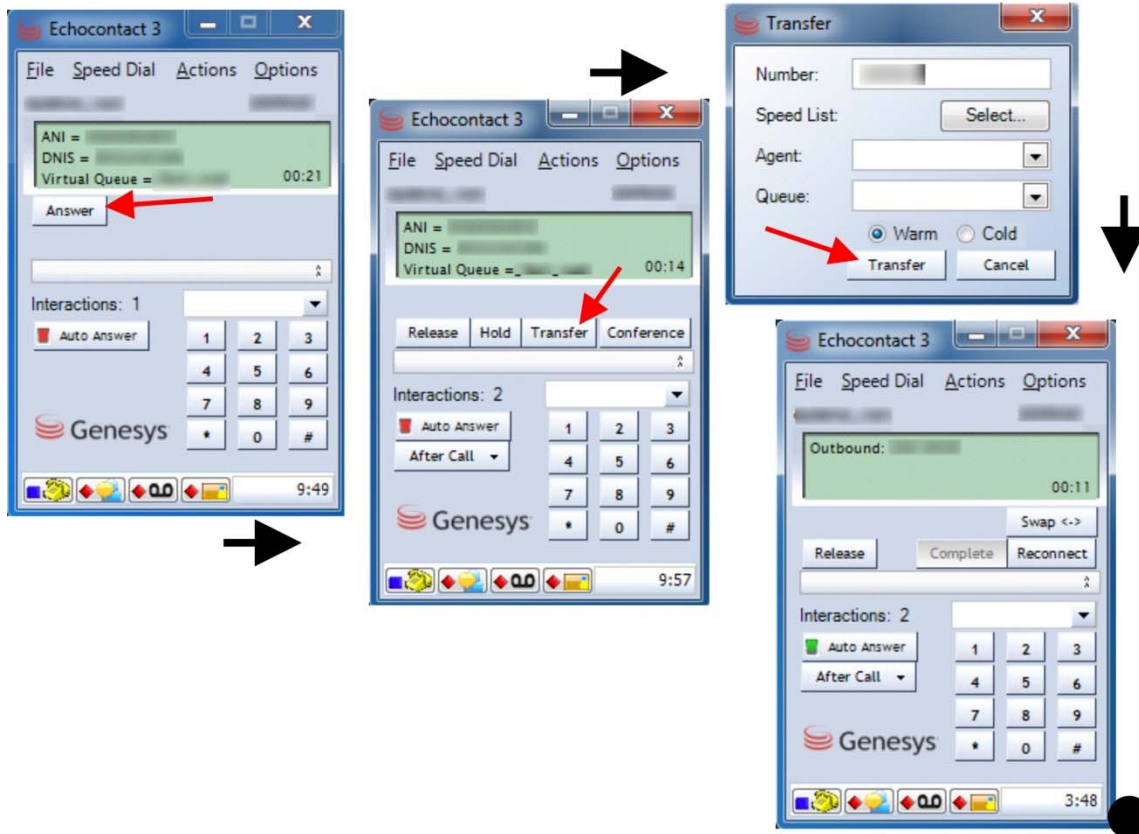


Follow these steps to place a customer on hold:

1. Click the **Hold** button.
2. Retrieve the customer from hold by clicking the **Retrieve** button.

### Transfer the Call

When you have an active call, the **Transfer** button displays. You transfer a call using this button.



Follow these steps to transfer a call:

1. Click the **Transfer** button, opening the **Transfer** dialog box.
2. Choose one of the following three options:
  - a. Enter the number to call in the **Number** field.
  - b. Click the **Select...** button to select the appropriate speed dial list associated with the user group from the **Speed List**.
  - c. Select an agent from the **Agent** drop down.
3. Select the **Warm** button or the **Cold** button, as needed.
 

**Note:** A *Warm* transfer is a conference hand-off. The transferring agent communicates with the receiving agent before bringing the caller on. A *Cold* transfer sends the call to an agent or queue with no introduction.
4. Click the **Transfer** button. The call transfers to the selected destination.
5. On a *Warm* transfer, the agent provides an appropriate introduction.
6. Click the **Complete** button to finish the call.

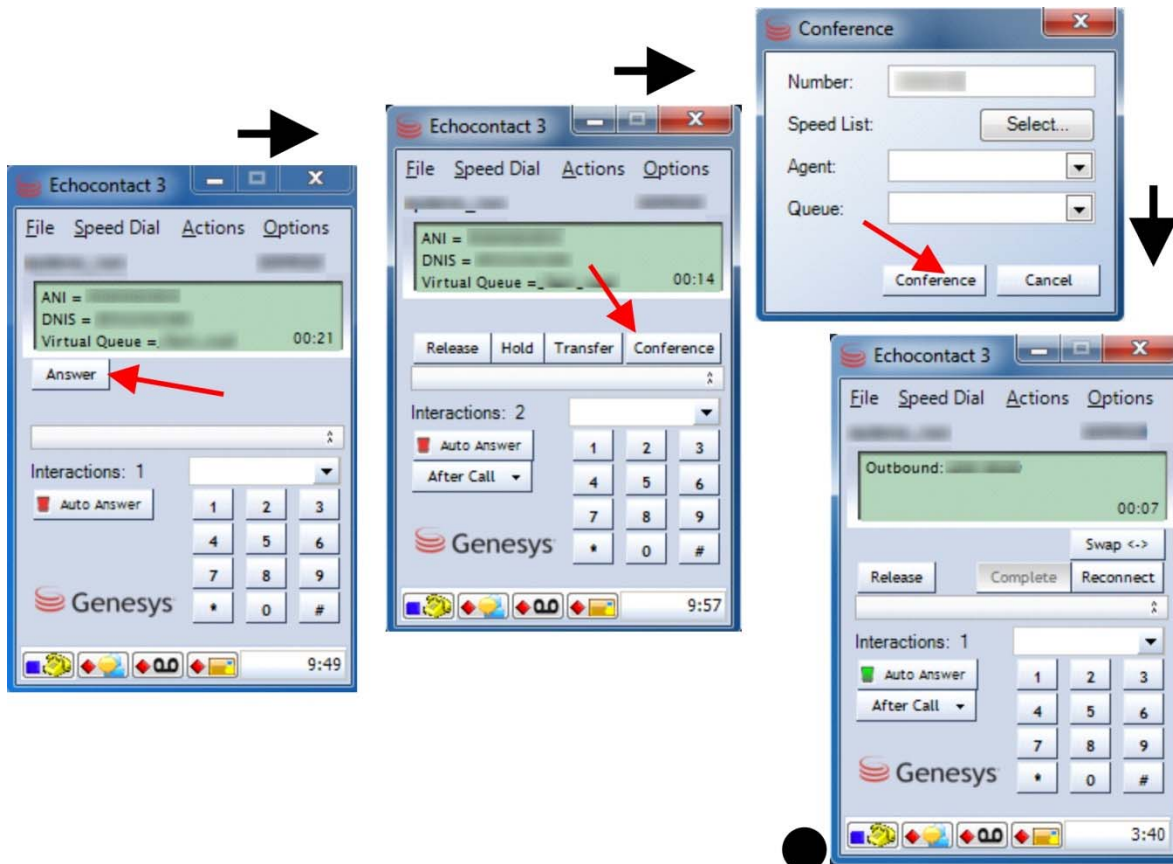
**Note:** If the transfer target is not available, you can retrieve the customer by pressing the **Reconnect** button. The **Reconnect** button only displays when needed.

**Transfer Options**

<b>Transfer Option</b>	<b>Use</b>
Number	Enter the phone number of where you want to transfer the call.
Speed List	Select the appropriate speed dial list associated with the user group.
Agent	Select an individual agent to send the call to. (With a busy signal, re-transfer the call.)
Release	Terminate the active call.
Complete	Transfer Complete drops the agent off of the transfer of the two parties that the agent transferred.  Conference Complete, once pressed, allows all three parties to hear each other.
Reconnect	Pickup an on-hold call.

## Conference a Caller

When you have an active call, the **Conference** button is available on the soft phone. You may start a conference through this button.



Follow these steps to conference a call:

1. Click the **Conference** button.  
*The Conference window opens.*  
**Note:** The options in the Conference window are configurable by the administrator and can vary depending on install.
2. Choose one of the following three options:
  - a. Enter a number in the **Number** field with which to conference.
  - b. Click the **Select...** button to select the appropriate speed dial list associated with the user group from the **Speed List**.
  - c. Select an agent from the **Agent** drop down list.
3. Click the **Conference** button.
4. When the third party answers the phone, complete the conference by clicking the **Conference** button. You are now engaged in a 3-way conversation with the customer and the third party. Genesys EchoContact 3 displays the number of participants in the call.

5. If the third party is not available, you can retrieve the customer by pressing the **Reconnect** button.
6. To remove yourself from the conference call, press the **Release** button. The customer and third party remain connected.

**Note:** There is no way to force all parties to terminate the call.

### Common Conference Options

Conference Option	Use
Number	Enter a phone number to conference into the call.
Speed List	Select the appropriate speed dial list associated with the user group.
Agent	Select an individual agent to conference into the call.

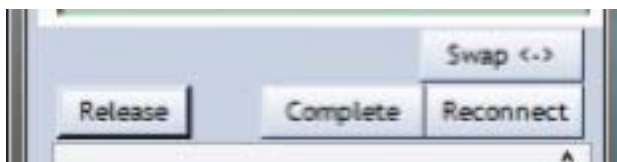
#### Tip



Before you press the **Release** button, you can right-click the **Transfer** button to get a quick list of numbers for transferring.

## Swap

Swap is similar to a Transfer. Swap allows an agent the ability to switch between two or more individuals while on a call; usually for the purposes of consultation. For example, a consultation between agent and supervisor while the customer or originating party hears hold music.



Follow these steps to swap between calls:

1. Click the **Conference** button, opening the conference window.
2. Choose one of the following three options:
  - a. Enter a number in the **Number** field with which to conference.

- b. Click the **Select...** button to select the appropriate speed dial list associated with the user group from the **Speed List**.
  - c. Select an agent from the **Agent** drop down list.
3. Click the **Conference** button.  
*The **Swap** button displays.*
4. Click the **Swap** button to switch to the on hold call. **Swap** back and forth, as needed.
  - a. Option: To remove third party (for example and additional agent) from call and resume conversation with the original party (i.e. customer), press **Reconnect**. The additional agent is disconnected.
  - b. Option: To remove either party, press **Release** and click on the number of the agent you want to release. Press **Retrieve** to get the caller back.
  - c. Option: To conference in both parties, click **Complete** to conference in all parties.
5. To remove yourself from the conference call, press the **Release** button. The customer and the third party remain connected.  
**Note:** You can end a call in Swap for the current caller when you click the **Release** button.

## Release a Call

When a customer hangs up, the call terminates. In the event an agent needs to terminate the call, click the **Release** button. Genesys EchoContact 3 returns to a *Ready* state, making you available for calls.

Follow this step to release a call:

1. Click the **Release** button. The call hangs up and call disposition information can be entered.

## Genesys EchoContact 3 Voicemail

Genesys EchoContact 3 voicemail is routed to the agent in the form of a screen popup and a chime played on the hard phone.

- From the **File** menu, voice mails can be saved as \*.wav files, which allows an agent to review them on most media players, send them by email, or store them.
- The voice mail can be played and paused as needed with the **Play** and **Pause** buttons.
- The slider bar allows the message to be scrolled and played from any point in the message.
- Click the **Complete** button to end the voice mail interaction and delete the voice mail.

## Dialing Out with Genesys EchoContact 3

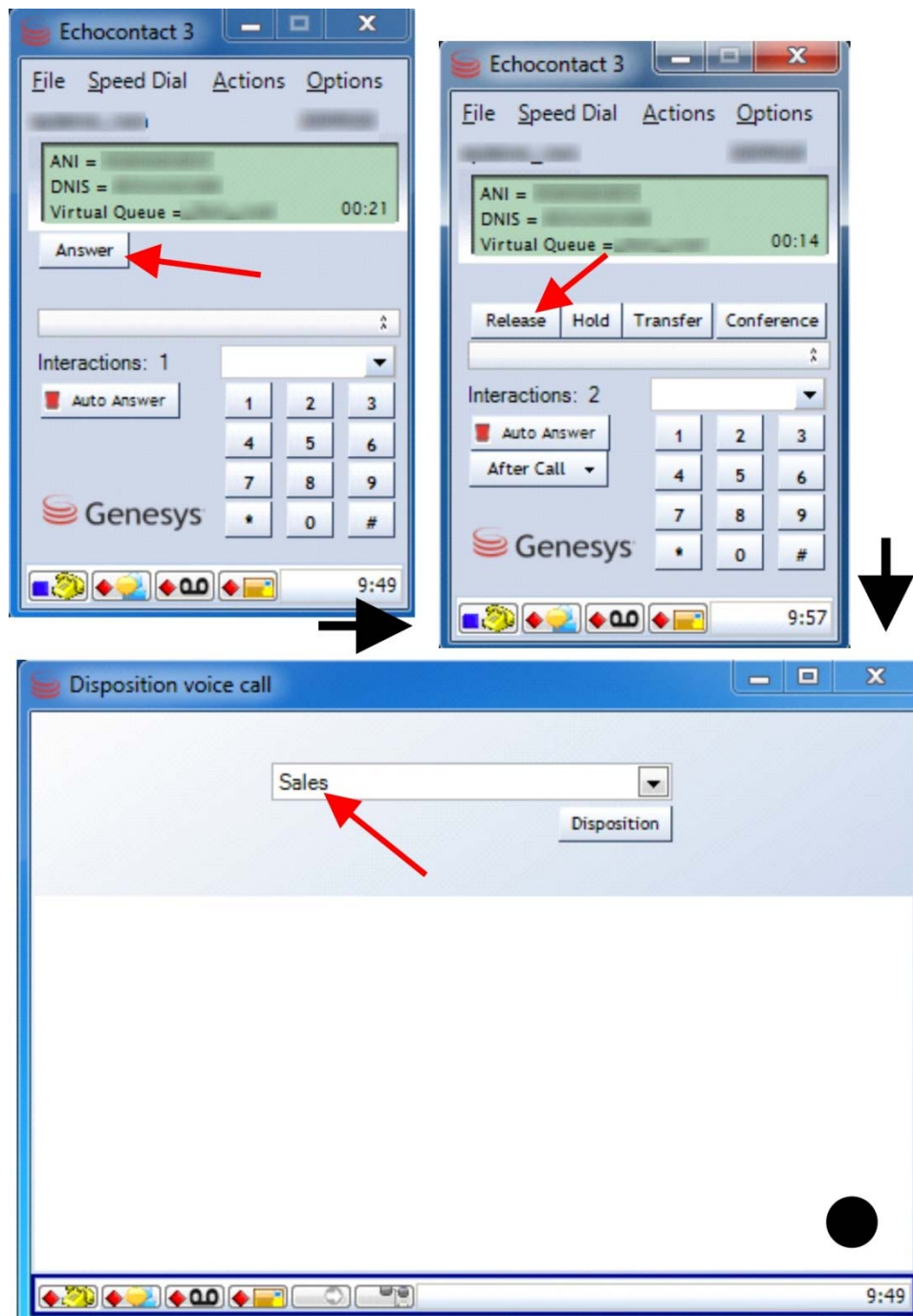
Follow these steps to dial out with Genesys EchoContact 3. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Confirm you are in *Not Ready* mode then enter a valid area code and phone number into Genesys EchoContact 3 by using your computer keypad. (You may also click on the Genesys EchoContact 3 numeric keypad.) The phone number displays in the phone number drop down.  
**Note:** You may also select a phone number from the speed dial list, or from the recent calls drop down.
2. Click the **Dial** button or click the **Enter** key on the keyboard. The phone number is dialed.
3. When finished, click the **Release** button to terminate the call. Genesys EchoContact 3 resets to default.  
**Note:** You must enter a 91 prefix to dial out with the soft phone.



## Call Disposition

Based on how Genesys EchoContact 3 is configured, you may be prompted to enter a call disposition upon call termination. The use of dispositions allows you to specify the results of voice contacts. At the end of a call the **Disposition Voice Call** screen displays.



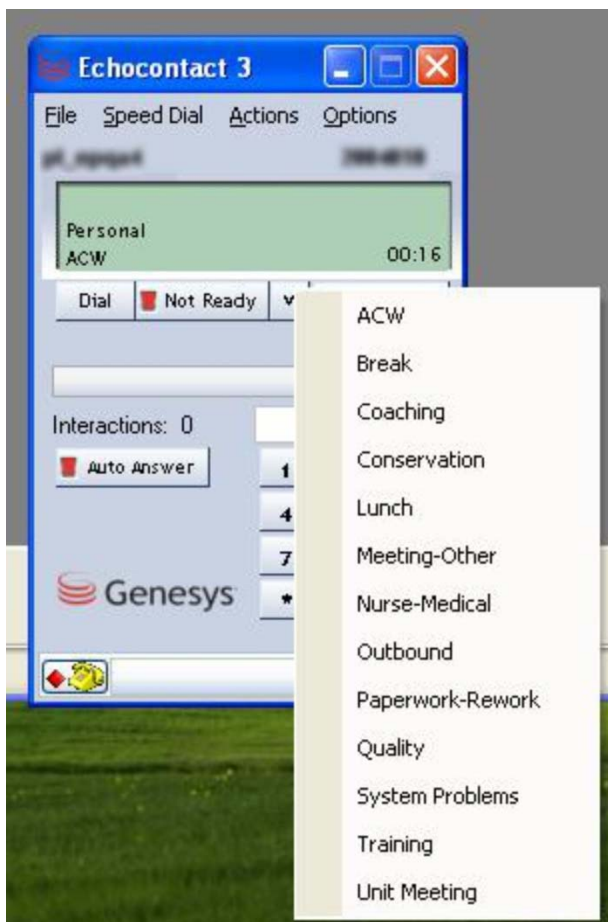


Follow these steps to enter a call disposition.

1. On the **Disposition Voice Call** screen, select an option from the drop down to rate the call.
2. Click the **Disposition** button to enter the selected disposition into the system.

## Not Ready Codes

You can give the system the reason you are not available to take calls. No calls are routed to you until you switch status to *Ready*. You have a list of choices or Not Ready Codes that display this information.



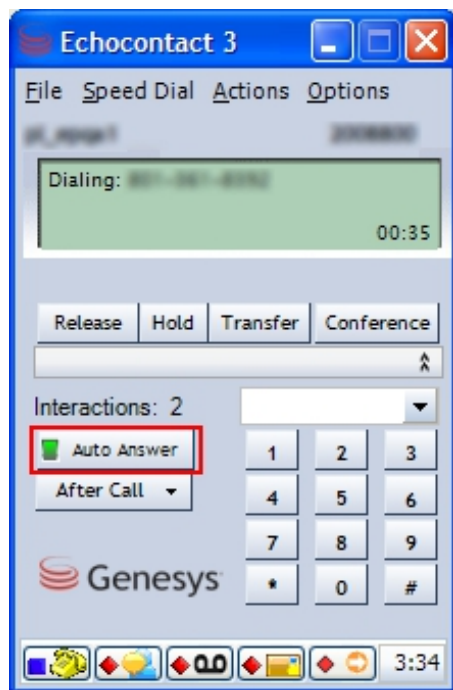
Follow these steps to select a Not Ready Code from the soft phone.

1. When you go *Not Ready* (click the **Ready** button), a list of Not Ready Codes display.
2. Click on the desired code. You are now in Red status, with your chosen code listed as the reason.

**Note:** You must click **Ready** to again receive calls.

## After Call Status Drop Down

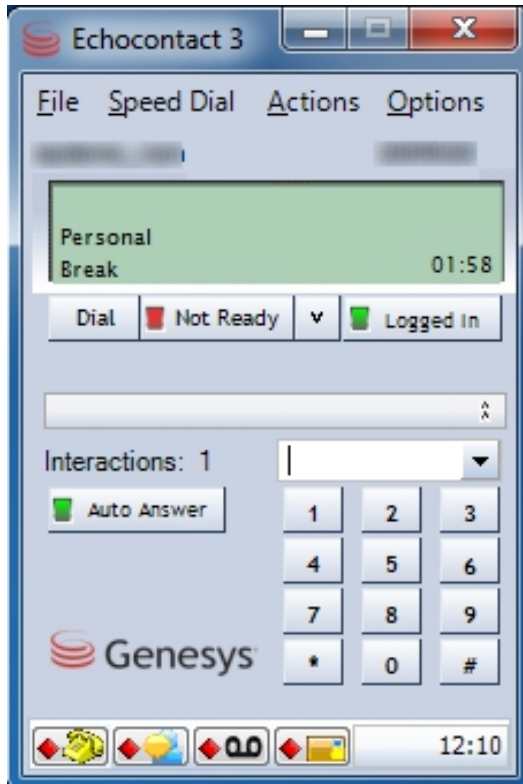
The **After Call Status** drop down allows an agent to select an After Call Work (ACW) code before the call is terminated. The **After Call Status** drop down displays when a routed call is received by the soft phone. The After Call Status button is shown on the figure below.



**Note:** The **Auto Answer** button shown here may not be visible on some Genesys EchoContact 3 displays.

Follow these steps to select an **ACW** code during a call.

1. With the routed call still active, the **After Call** drop down list displays.
2. Click the **After Call** drop down to select an ACW code (for example, "Break").
3. When the call is finished, click the **Release** button.  
The **Not Ready** reason code displays as the status indicator as shown in the figure below.



## Viewing Recent Interactions

You can view information about the interactions made during the current Genesys EchoContact 3 session (as defined by logging in).

Date	From	ConnID	Duration	Dial
7/8/2009 9:59:08 AM	[REDACTED]	41660168058630529	00:31	[REDACTED]
7/8/2009 10:00:26 AM	[REDACTED]	41660168058630530	00:05	[REDACTED]
7/8/2009 10:01:48 AM	[REDACTED]	41660168058630531	00:14	[REDACTED]

Follow these steps to view recent interactions. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Select **Actions > Recent Interactions**.  
The **Recent Interactions** window displays.
  2. Click the Windows interface **X** button (upper right corner of the window) to close the Recent Interactions window.
- Note:** Recent Interactions include both inbound and outbound calls. Recent Interactions are deleted when you log off or exit the system.

### Tip



You can click the **Dial** button associated with a Connection ID (ConnID) to place a call to that number.

### Tip



If you experience a problem with a call (for example, bad volume or dead air) you can flag the call by right-clicking the record and selecting “Flag as Problem” and add comments to the support form that pops up. The ConnID and logs are then automatically uploaded into an incident for the Genesys Echopass Support team.

## Genesys EchoContact 3 Error Messages

### Soft Phone Exit Error Message

If you select **File > Exit** (or click the interface **X** button to close Genesys EchoContact 3) while on a call the error message below displays. Complete the call to make a soft phone exit possible.

*Error: Cannot Close EchoContact while calls still in progress.*

### Logging out and Exiting Genesys EchoContact 3

Follow these steps to log out and exit from Genesys EchoContact 3. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Click the **Logged In** button to log out of Genesys EchoContact 3. (The button changes to read **Logged Out**.) The **Logged Out** button is now red, indicating that you are not accumulating login time and that not interactions can take place.
2. Click the Windows interface **X** button (upper right corner of the window) to close the soft phone.  
Genesys EchoContact 3 closes and you are logged off the system.

**Note:** Be sure to log out or close the soft phone when your shift is over. You may accumulate time as logged in or in *After Call Work* status (or whatever Not Ready Code you have selected) if you don't remember to log out.

**Note:** If the Windows screen saver becomes active, the Genesys EchoContact 3 logs off the session automatically. The Not Ready Code reads “*Screen Locked*”. **Screen Locked** cannot be selected from the Not Ready Codes drop down.

If you select **File > Exit**, or click the interface **X** button to close Genesys EchoContact 3 while on a call, the following error message displays:

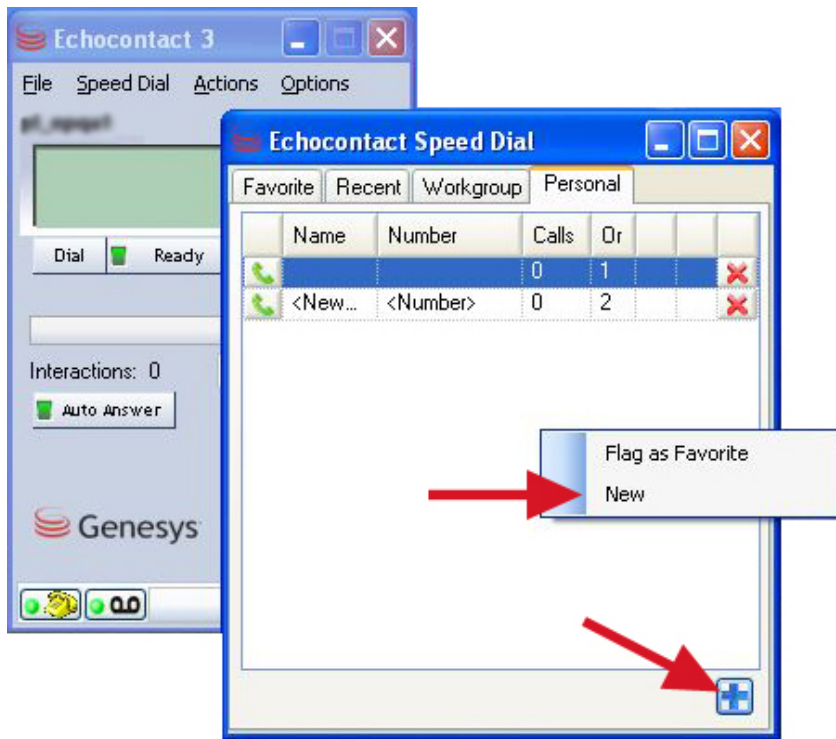


Cannot Close Echocontact while calls still in progress.

## Speed Dial

Genesys EchoContact 3 Speed Dial allows the creation of a list of phone numbers that can be dialed from the soft phone. Users can create speed dial entries on the **Personal** tab. Other tabs will be populated automatically as configured by the administrator.

**Note:** Users can only dial out this way while in *Not Ready* status.

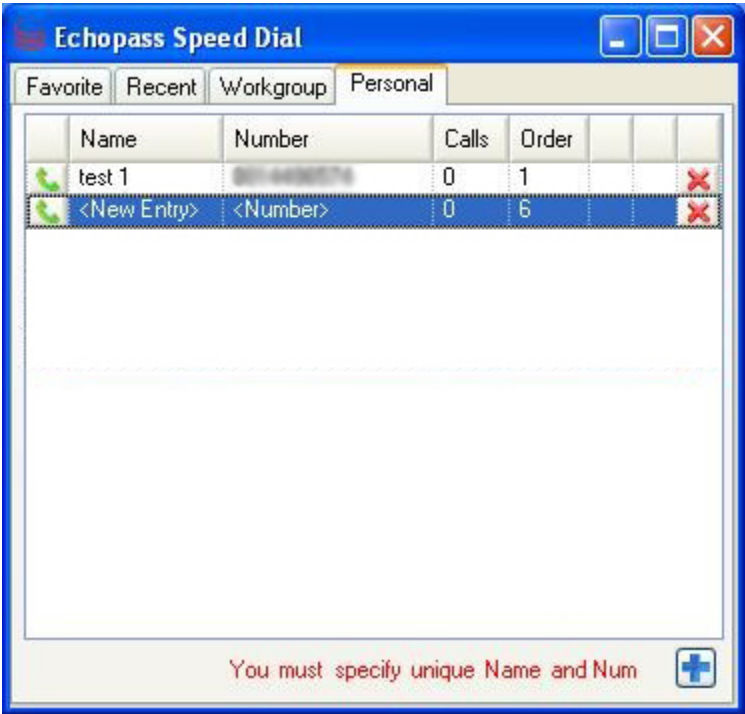


### Creating a Speed Dial Entry on the Personal Tab

Follow these steps to create a speed dial entry:

1. From the soft phone, select **Speed Dial**.  
*The Genesys Echopass Speed Dial screen displays.*
2. Click the **Personal** tab.
3. Click the **New Entry** icon or right click and select **New**.
4. Enter the required information in the available fields (see table below).  
*The speed dial entry is now available under the **Speed Dial** menu.*
5. Click inside the Speed Dial table in order to save your entry before moving to a different tab or closing the **Speed Dial** menu.

**Note:** If you try to create a duplicate entry, the error message “You must specify unique Name and Num” will display at the bottom of the box. The message remains at the bottom of the box and the data fields return to “<New Entry>, <Number>” until you create an entry with a unique name and number.

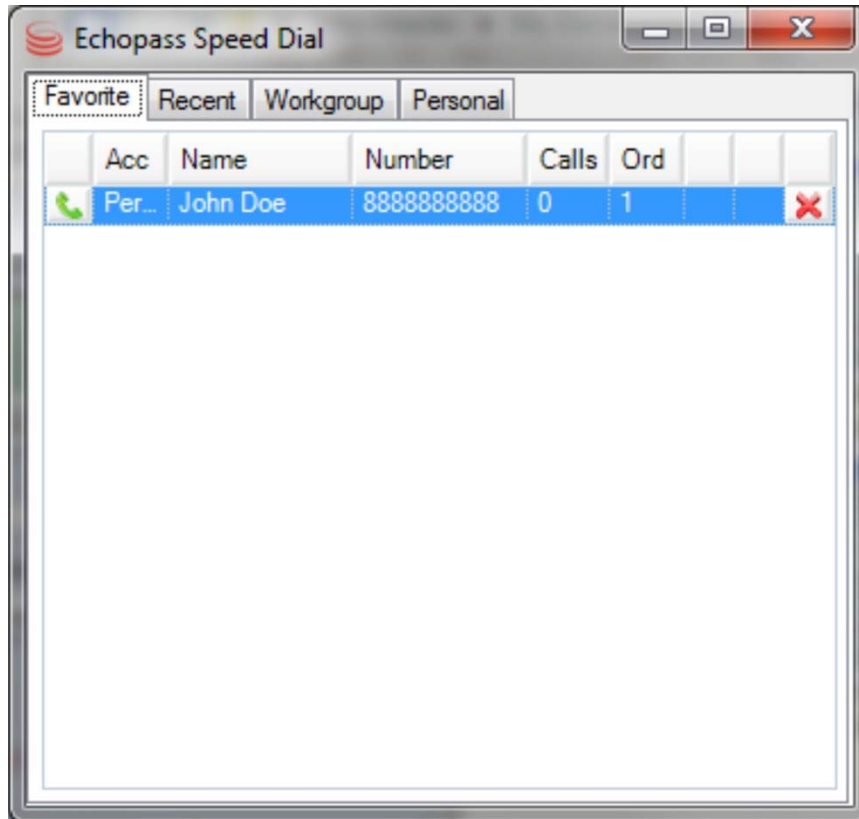


Speed Dial Field	Description
Favorite Tab	A list of agent-created phone numbers.
Account	The account associated with the speed dial phone number.
Name	The name of the speed dial account.
Number	The phone number associated with the account.
Calls	Number of calls placed to the associated number.
Order	The order in which the Speed Dial account was entered.
Recent Tab	A list of calls recently placed.
Workgroup Tab	A list of workgroups that can be called from this page.
Personal Tab	A list of agent created phone numbers that does not include workgroups or fellow agents.

## Flag as Favorite

Right click on an entry to flag it as a favorite. The favorites appear on the **Favorite** tab.





The above figure shows how the **Speed Dial** list appears after the changes are made.

## Deleting a Speed Dial Entry

Follow these steps to delete a Speed Dial entry:

1. Click the entry once to highlight it for deletion.
2. Click the **Delete** icon associated with the speed dial entry to be deleted.
3. Click **Yes** to confirm the deletion.

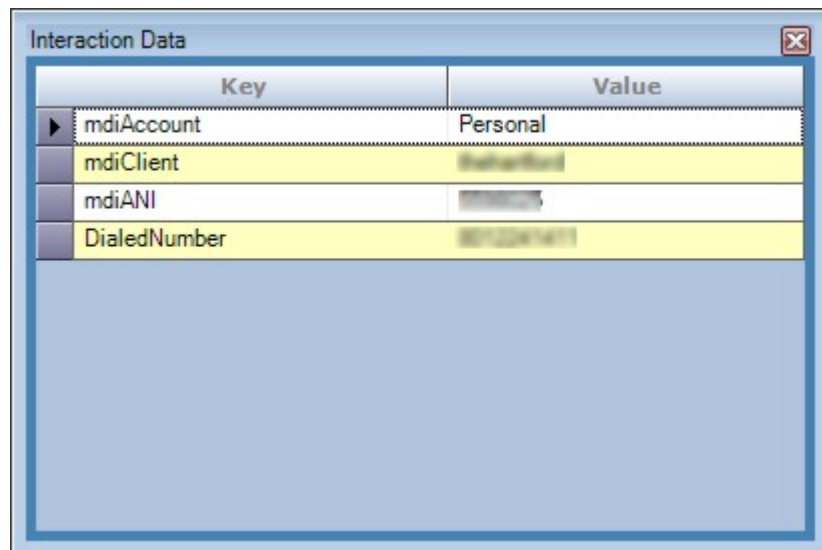
## Initiating a Speed Dial Call

Follow these steps to initiate a Speed Dial call:

1. Select **Speed Dial**.  
*The **Speed Dial** window displays.*
2. Select a tab to locate the desired number.
3. Click the dialing icon.  
*The **Confirm Dial** dialog box displays.*
4. Select **Yes**.

## Interaction Details

Interaction details can be viewed on the Interaction Data screen.



The screenshot shows a window titled "Interaction Data" with a close button in the top right corner. Inside the window is a table with two columns: "Key" and "Value". The table contains four rows of data. The first row has "mdiAccount" as the key and "Personal" as the value. The second row has "mdiClient" as the key and "Personal" as the value. The third row has "mdiANI" as the key and "Personal" as the value. The fourth row has "DialedNumber" as the key and "800-224-1411" as the value. The rows are alternating yellow and white background colors.

Key	Value
mdiAccount	Personal
mdiClient	Personal
mdiANI	Personal
DialedNumber	800-224-1411

Follow these steps to view Interaction Details:

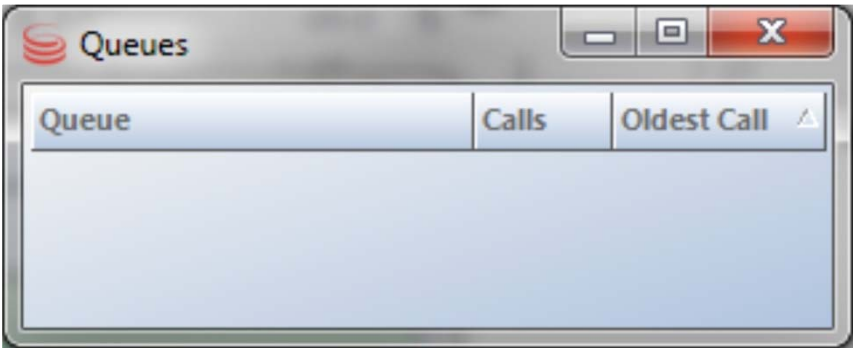
1. Select **Actions > Interaction Details**.
2. The **Interaction Details** screen displays.  
**Note:** You can click the column names to sort them.

# Call Queues

Call Queue display is for information only.

## Viewing Queues

Queues and any calls in the queue can be viewed from the **Queues** screen.



Follow this step to view Queues:

- 1. Select **Actions > Queues**.  
*The **Queues** screen displays.*  
**Note:** You can click the column names to sort them.

Queue Field	Description
Queue	A queue created in Echo System Manager (ESM) with calls waiting.
Calls	The number of calls in the queue.
Oldest Call	A column sort of queue calls by length of time.

## How to Configure Genesys EchoContact 3

You can customize Genesys EchoContact 3 to improve workflow.

### Resetting Genesys EchoContact 3

Reset Genesys EchoContact 3 to troubleshoot some issues, such as the Login/Logout buttons becoming grayed out, unresponsive buttons, disconnected from the hard phone, or if Genesys EchoContact 3 returns an error message.

Follow the step below to reset Genesys EchoContact 3. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Select **File > Reset**.

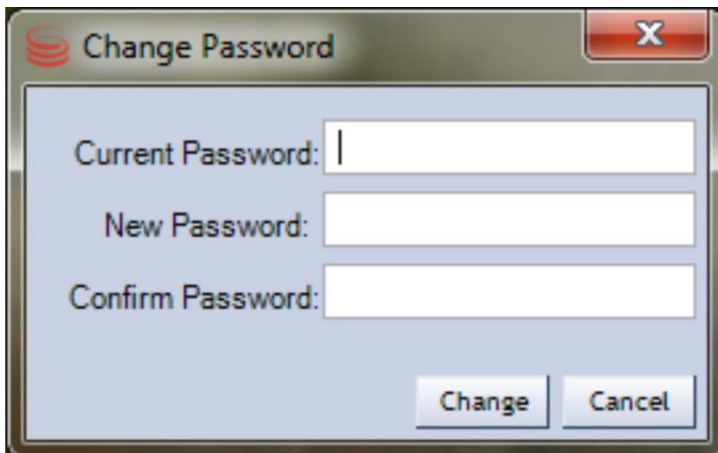
*Genesys EchoContact 3 resets in less than 1 minute.*

### Changing the Genesys EchoContact 3 Password

By default, Genesys EchoContact passwords are not required to be changed other than at first login, and do not expire.

Password rules are set by the system administrator.

- Agents can be required to change password upon first log in
- Passwords have to be at least 5 characters, alpha numeric characters are legal, non-case sensitive
- The system remembers the last five changed passwords (forcing an unique password each time it is changed)



Follow these steps to change the Genesys EchoContact 3 password. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Select **File > Change Password**.  
*The **Change Password** dialog box displays.*
2. Enter the current password, and then the desired new password twice. Asterisks (\*) display in the text fields.
3. Click the **Change** button.

## Setting Genesys EchoContact to Always be on Top

By default, Genesys EchoContact 3 is set to run in the background. Genesys EchoContact 3 displays in the foreground when an incoming call is received.

You can configure Genesys EchoContact 3 to always remain on top of other applications so that it is always visible. This is advisable as the interface takes up very little real estate on your desktop. This can be done with Genesys EchoContact 3 in any state.

Follow this step to set Genesys EchoContact 3 to always be on top. Begin this procedure from the Genesys EchoContact 3 soft phone.

1. Select **Options > Always on Top**.  
*Genesys EchoContact 3 now stays on top during any program or window switch.*

## Clearing the Redial List

The Redial List on the soft phone does not clear automatically. From time to time, as the list becomes too long to be useful, manually clearing it is advised.

Follow this step to clear the Genesys EchoContact 3 Redial List. Begin this procedure from the Genesys EchoContact 3 soft phone.

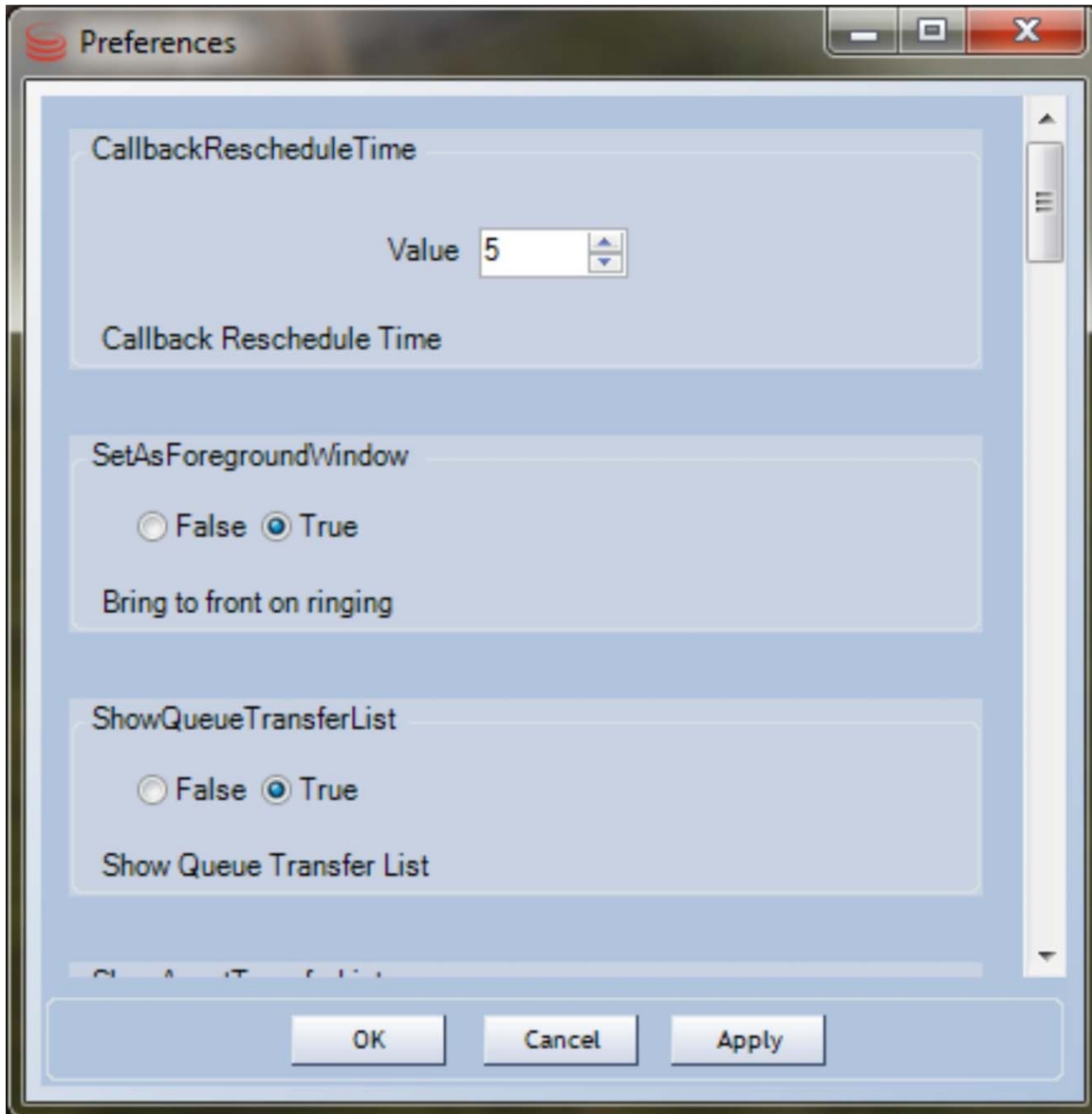
1. Select **File > Clear Redial List**.  
*The Redial list clears.*

**Note:** Only outbound calls display in the Redial List.

## Preferences

Use the Genesys EchoContact 3 window to set Genesys EchoContact 3 preferences.

**Note:** What can or cannot be viewed in the Preferences is configurable in ESM.



Follow these steps to view and edit Preferences:

1. Select **Options > Preferences**.
2. In the Preferences screen, make any changes required (see the table below for guidance on available options).
3. Click the **Apply** button to enter changes and keep the Preferences screen open.
4. Click the **OK** button to apply the changes and close the Preferences screen.
5. Click the **Cancel** button to close the Preferences screen without making any changes.

## Preference Options

Preference	Description
Use Last Transfer Number	
Idle Not Ready Reason	The state Genesys EchoContact 3 will go into when it is idle.
Idle Force Not Ready On Lock	Changes Genesys EchoContact 3 state when the screen saver is active or the computer is locked.
Client Help URL	
Confirm Dial Press	When a new outbound call is made it will ask to confirm the dial. Pressing yes will make the call and pressing no will cancel the dial.
Steal Focus On Multiple Interactions	
Disable Release on Answer	Timer for the Release button to be grayed out after a call is answered.
Display Yellow State Icon	When the Genesys EchoContact 3 media buttons are not equal, the not ready button will be yellow.
Preview Record Skip	Outbound: this allows the user to skip the outbound record to be dialed.
Agent Email Address	The return Email address that populates the From line for Emails sent from Genesys EchoContact 3.
Default Email From Address	The default return Email address that populates the From line for Emails sent from Genesys EchoContact 3.
Callback Reschedule Time	Callback: Enter a time, in minutes, to schedule a callback.
Set as Foreground Window	Bring the soft phone to the front upon an incoming call.
Show Queue Transfer List	Display the Queue Transfer List when selecting a transfer.
Show Agent Transfer List	Display the Agent Transfer List when selecting a transfer.
Always Flash Taskbar	Flash the Genesys EchoContact 3 task bar when there is an incoming call.
Always Bring to Front	Display Genesys EchoContact 3 when there is an incoming call.

Play Ring Notification	Play a notification sound when Genesys EchoContact 3 receives an incoming call.
Client Dictionary Only	Allow the user to customize the spell check dictionary.
Custom Ring Notification	Select a custom ring notification (*.wav file) from a location on the hard drive.

**Note:** Genesys EchoContact 3 exposes only a subset of these preferences depending on how it has been configured by the Administrator of the Agent's workgroup.

## Refresh Preferences

When changes are made to preferences, choose the **Refresh Preferences** option to apply the changes.

Follow this step to Refresh Preferences:

1. Select **File > Refresh Preferences**.



## Change History

This section lists topics that are new or that have changed significantly in the 3.3 release of this content.

### **New In Release 3.3**

- This user guide was re-branded and restructured for clarity and usability.