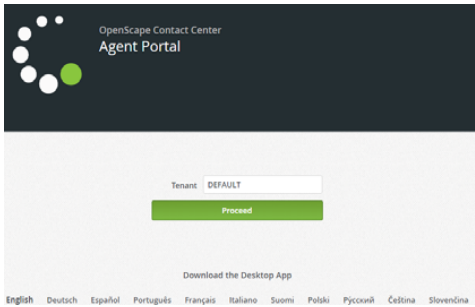


## Logging on

Before the user interface is displayed, you must log on.  
How to log on:

### Step 1 - Specify your tenant

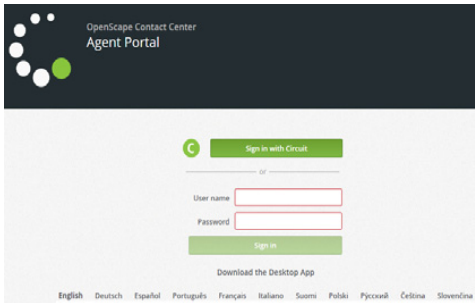
- Open the URL in Chrome, Firefox or Edge:  
<https://<ApplicationServer>/agentportal>
- If you are logging in for the first time
  - Select your language
  - Enter your tenant name
  - Click Proceed



If your system does not have multiple tenants, then this step is skipped.

### Step 2 - User name and password

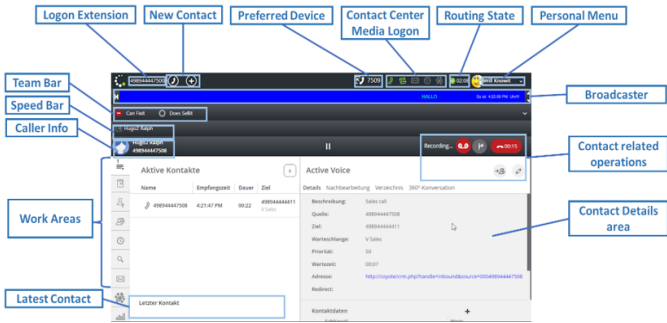
- On the next screen:
  - Enter your user name and password
  - Click Sign in



A different login screen might appear if your system is configured for SSO Sign-on with your corporate credentials.

## User interface

The user interface of Agent Portal Web consists of:



### Feature control buttons

- Logging on/off for Media Types
  - ☐ All Media
  - ☒ Telephony (inbound calls)
  - ☐ Callback
  - ☐ E-Mail
  - ☐ Web collaboration (chat)
  - ☐ OpenMedia (Facebook, Twitter, WhatsApp, ...)

- Receiving telephone contacts
  - ☒ Setting your preferred device or working with the integrated phone

- Selecting your routing state
  - ☒ Available  
The system assigns contacts to you.
  - ☐ Not available  
Unproductive absence
  - ☐ Work  
Productive absence

- Actions (on the phone)
- Actions (for contacts)

- Performance Status  
The attendance status is displayed for members of the team, in the team list and in the team bar
  - ☐ Logged out
  - ☒ Active (in a contact)
  - ☒ Idle
  - ☐ Absent
  - ☐ Busy

# Unify OpenScape Contact Center

## Agent Portal Web Basics and Voice Media

### Quick Reference Card

A31003-S22B0-U105-01-7619

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- Starting a new call or initiating a consultation call
- Accepting a call
- Disconnecting a call
- Holding a call
- Resuming a call
- Forwarding a call
- Conference (from existing consultation call)
- Mute (only for integrated phones)
- Postdial DTMF tones (only for integrated phones)
- Starting and stopping voice recording
- Audio and video device settings (only for integrated phones)
- New contact:
  - Scheduling a callback or writing a new email
- Terminating Post Processing activity or extending Post Processing activity
- Requesting assistance from a designated supervisor (in personal menu)
- Requeuing a contact
- Active Contacts
  - The list of contacts you are currently editing
- Speed List
  - Your personal phone book
- Team List
  - The members of your team
- Queues
  - The queue statistics assigned to you
- Activity Log
  - Contacts in the last 24 hours of login time
- Email
  - Your deferred emails and email search
- OpenMedia
  - Your deferred OpenMedia contacts
- Search
  - Directory search
- Performance
  - Your performance statistics (available only to you)
- Settings
  - Agent Portal Web Settings

- Miscellaneous
  - Choose columns
    - Allows you to select the splats in a workplace
  - Items in a list:
    - Add, change or remove

## Specifying your Logon Extension

- Extension
- Click on "No Extension" and specify your extension.
- If the displayed extension is wrong, click on it and specify a new one.



## Logging in as Contact Center Agent to receive Routed Contacts

### Log in

- To login, click one or more media types:

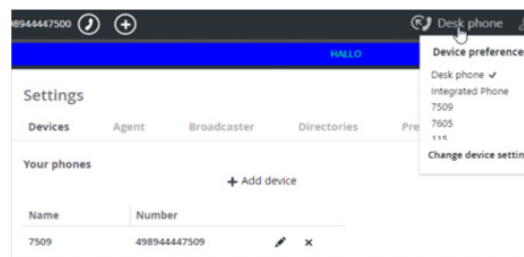
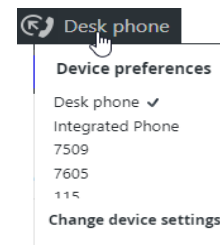
- Voice
- Callback
- Email
- Web Collaboration
- OpenMedia
- Or login to all media

- The buttons turn green when you are logged on.

### Select your Routing State

- Select your Routing State from the menu:
  - Available - You are ready to receive calls
  - Not Available - You are on a break or serviced out
  - Work - You are currently busy with another task

- Select your Preferred Device.
- Select a preferred device for Voice and Callback or use the integrated phone.
- Select "Change device settings" to add or remove entries.
- Change the Device Settings.
- Use Settings/ Devices to manage your devices. Numbers must be entered in the international format, starting with "+".



## Taskbar

- The taskbar contains all relevant functions to handle contacts.



## Call Control Areas

- The call control panel in the main window of the Agent Portal Web provides a convenient way to handle calls.



## Call Handling (Media Types Voice and Callback, and direct calls)

### Accept or disconnect calls

- To answer calls, click Accept or pick up the headset.
- To end calls, click Disconnect or hang up from the headset.

### Call Hold and Retrieve

- To hold calls, click Hold.
- To hold calls, click Retrieve.

### Transfer

- To transfer a call, use the Blind Transfer button.

### Consultation

- To start a consultation call, use the New call button or dial from one of the work areas.
- On a consultation call, you have the following options:
  - Go back to the original call
  - Join a conference
  - Transfer the call (supervised transfer)

## Post Processing (displayed in the main window and in the taskbar)

### Exit Post Processing

or

- Click on the Post Processing button to exit or extend Post Processing.

### Specify reasons for Post Processing

- Press in an active contact to specify the reason for mutual Post Processing or select the reason from the taskbar menu.

Post Processing pending

- If a reason for Post Processing has been selected during a contact, the contact status changes to "Post Processing pending".

Active contacts

- Active contacts list all the Contacts you are currently handling and the details of previous active contacts.

Active Contacts			
Name	Time received	Duration	Destination
4964764141C 10:16:00 PM	54:25	11235554412 V-Service	
abc2@contat: 10:22:07 PM	48:24	info@contactcenter.c E-Support	
abc2@contat: 10:22:08 PM	48:24	servicedesk@contact E-Service	
Promotion P. 11:10:08 PM	00:49	Default Web Queue	

- The Primary Contact is marked with a dark label, on the left.
- The contacts marked with light green, require your attention.
- To handle another contact, double-click on it. The contact details will be displayed.
- To edit multiple contacts at the same time, the "Multiple Contact Handling" option must be enabled in OpenScape Contact Center by the administrator.

Contact Details Area

- The Contact Details Area for routed calls provides more information and options:
  - Contact Details:
  - Description
  - Source
  - Destination
  - Queue
  - Priority
  - Wait Time
  - Address
  - Redirect
  - Wrap-up tab
  - Directory tab
  - 360° Conversation tab
  - Requeue button
  - Post-Processing button

Active Contacts			
Name	Time received	Duration	Destination
4964764141C 10:16:00 PM	54:25	11235554412 V-Service	
abc2@contat: 10:22:07 PM	48:24	info@contactcenter.c E-Support	
abc2@contat: 10:22:08 PM	48:24	servicedesk@contact E-Service	
Promotion P. 11:10:08 PM	00:49	Default Web Queue	

Specify Wrap-up Reasons

- Select the Wrap-up tab, enter a wrap-up reason, then select Save.
- The Wrap-up Reasons can be entered during the call or after the call, if Mandatory Wrap or Post Processing is enabled.

Requeue Contacts

Active Voice

Details Wrap-up 360° Conversation

Choose wrap-up reasons

Name	Description
<input type="checkbox"/> PIN lost	Need to issue new PIN code.
<input type="checkbox"/> Other	None of the listed reasons.
<input type="checkbox"/> Campaign	Calls due to promotion campaign.
<input checked="" type="checkbox"/> Tech question	Question regarding tech details.
<input type="checkbox"/> Product question	Question regarding product features.
<input type="checkbox"/> Sold	Sold one or more articles.

Save

Requeue to

Requeue to Attendant

Requeue to Sales

Requeue to Service

Requeue to Support

- You can Requeue a call when another queue would be more appropriate.
- To requeue a call, click .
- A menu appears to select the queue target.

360° Conversation

- 360° Conversation can provide an overview of previous customer interactions with the contact center.
- The agent can edit the details and update them while handling a contact.
- This feature must be enabled in OpenScape Contact Center by the administrator.

More than one customer entry is found for that contact

Unknown Customer 496476414102

ABC Company 496476414102

Search Customer

Create customer

Active Voice

Details Wrap-up 360° Conversation

ABC Company Evolution City, USA 496476414102 abc2@contactcenter.openscape.com

History

496476414102 3:33 PM

My new note

abc.company 3:32 PM

A chat contact with them ...

496476414102 3:29 PM

Has called us ...

abc2@contactcenter.openscape.com 2:25 PM

Apr 14, 2019

Save

Cancel

Speed List

- Speed List is a personal phone book for making calls.
- To create a speed list:
  - Add a Speed List entry
  - Click on "+ Add new".
  - Type in the first name, last name and numbers.
  - Click Save.

Search

- To edit a contact click on the entry and select "Edit Contact".

Speed List

1

Speed List

Office email

Create New Contact

Mary Maud 099070101

John Smith 096076414102

Julius Caesar 096076414110

First name

Last name

Accessibility

Phone: Home phone

Mobile:

Office email:

Home email:

Save

Cancel

Team List

- This area shows a list of agents in your team and their details and presence state. You can call them directly from Team List.

Team List					
Name	Extension	Media	Presence state	Routing state	
Knoest, Will 1000	498944447500	Sprache	Frei	Verfügbar	
Fisch, Can 1000	498944447503	Sprache, Callback	Abwesend	Nicht verfügbar	
Selbst, Does 1000	498944447501	Sprache	Belegt	Tief	
ContactCenter, Student 1000	498944447507	Sprache, Callback	Frei	Verfügbar	
Heuerich, Hugo 1000			Nicht angemeldet	Nicht angemeldet	

Queues

- This area shows the live queues. You can filter the view for easier searching and choose what statistics to display.

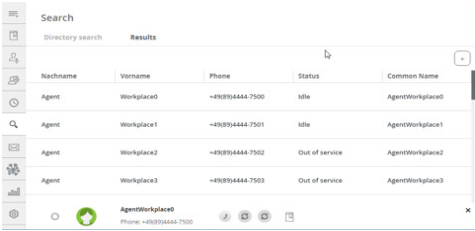
Queues				
Name	Contacts	Oldest contact	Shift contacts received	Service level
V Sales	0	00:00	3	100.0
V Service	0	00:00	5	80.0
V Support	0	00:00	0	100.0
S-Mitchell Routing	0	00:00	0	100.0
Kreditkarte	0	00:00	0	100.0
Service	0	00:00	0	100.0
Concierge	0	00:00	0	100.0

Activity Log

- This area shows recently routed and direct contacts. You can call back an entry in the log or modify the columns.

Activity Log			
Name	Occurred	Status	Contact type
Bernhard Doeblner 496476414110	8:58 AM	Successful 00:45	Routed voice Internal
customers customerabc@contactcenter.openscape.com			
Bernhard Doeblner 496476414110	Yesterday 6:44 PM	Successful 00:48	Routed voice Internal
Bernhard Doeblner 496476414110	Yesterday 6:43 PM	Successful 00:56	Routed voice Internal
Bernhard Doeblner 496476414110	Yesterday 6:41 PM	Successful 01:30	Routed voice Internal
Bernhard Doeblner 496476414110	Yesterday	Successful	Routed voice

- In this area you can search for directories. This is useful if you have colleagues and customers outside the contact center. The presence status of UC users can be displayed, if configured.

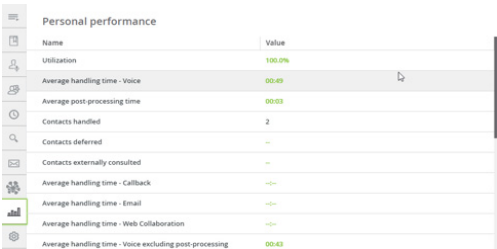


The screenshot shows a 'Search' window with a 'Directory search' tab. Below the tab is a table with columns: Surname, Vorname, Phone, Status, and Common Name. The table contains five rows of data for agents at different workplaces.

Surname	Vorname	Phone	Status	Common Name
Agent	Workplace0	+49894444-7500	Idle	AgentWorkplace0
Agent	Workplace1	+49894444-7501	Idle	AgentWorkplace1
Agent	Workplace2	+49894444-7502	Out of service	AgentWorkplace2
Agent	Workplace3	+49894444-7503	Out of service	AgentWorkplace3

## Personal Performance

- In this area you can view your personal performance statistics.



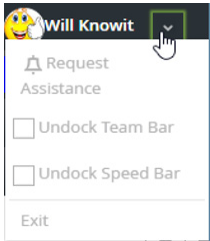
The screenshot shows a 'Personal performance' window with a table of statistics. The table has two columns: Name and Value.

Name	Value
Utilization	100.0%
Average handling time - Voice	00:09
Average post-processing time	00:03
Contacts handled	2
Contacts deferred	=
Contacts externally consulted	=
Average handling time - Callback	<--
Average handling time - Email	<--
Average handling time - Web Collaboration	<--
Average handling time - Voice excluding post-processing	00:43



## Menu (username)

- Click on the drop-down menu to access the following features:


- Request Assistance
- Undock Speed Bar
- Undock Team Bar
- Log off from Agent Portal Web



Logging on for media type callback

- Click on the gray Callback icon: 
- The icon turns green when you are logged on: 
- Select the available routing state to receive callbacks.

Receiving callbacks

- The Active Callback window is displayed when a call-back arrives.
- To accept a callback, click the Accept button: 
- Agent Portal Web automatically attempts to dial the destination number.

Active Callback tabs

Active Callback

Accept

Delete

Details

Wrap-up

Attempt Log

360° Conversation

Description: Campaign

Name: Robert Smith

Source: 11235557500

Destination: 9011496476414102

Queue: C Sales

Priority: 20

Wait time: 00:09

Address: http://10.20.100.11/crm.php?handle=Outbound&destination=9011496476414102

Schedule

Start	End	Number	Status
4/22/19, 5:48 AM	4/22/19, 8:48 AM	9011496476414102	Active

Contact data




Key:

Value:

+

- Details/Address tab: can be used to access additional information and resources for the callback.
- Wrap-up tab: can be used to select a wrap-up reason.
- Attempt Log tab: lists the agent name, retry reason and the date of each attempt.
- 360 Conversation tab: is displayed only if it has been enabled by your system administrator.

During a call, you can:

- Use all telephony features as usual
- Use the requeue button  to add the call to a voice queue.
- Specify Post processing reasons , as usual
- Delete Callback 

To accept or delete a callback, you need to select a reason from the displayed list.

Specifying Retry Reasons

Once a connection is terminated, the Retry Options are automatically displayed.

It is mandatory to enter a callback result:

- If successful, select "No the callback was successful".
- If not successful, select "Retry later" - select a Cause and the retry time or "Now" - specify the number to be called right away

When finished, click

Retry Options

Enter a retry option to close this callback.

Would you like to retry the callback?

☒ No the callback was successful.

☐ Retry later

☐ Now

Cause: Answer Machine

Retry in: 01:00

Retry No.: 1434254654768

Done

Retry Options

Enter a retry option to close this callback.

Would you like to retry the callback?

☐ No the callback was successful.

☒ Retry later

☐ Now

Cause: Not Home

Retry in: 00:30

Retry No.: 00496476414118

Done

Scheduling a new callback

To create a callback from the New Contact menu, select the "Create new Callback" option and enter:

- Details:
  - Name
  - Queue
  - Description
  - Priority (1 to 100)
  - Reserve for user
- Schedule
  - Time intervals
  - Phone numbers
- Contact Data (optional)

Edit callback date

Configure the details of a certain callback

Start time:

04/22/2019

07:30 AM

End time:

04/22/2019

10:30 AM

Phone no.:

9011496476414102

Done

Cancel

Create new Callback

Details

Name: Robert Smith

Queue: C Sales

Description: Campaign

Priority: 20

☐ Reserve for user

CC Outbound

Schedule

Start	End	Number	Status
4/22/19, 5:48 AM	4/22/19, 8:48 AM	90114964764141...	Undefined

Contact data

Key:

Value:

+

Done

Cancel

Unify OpenScape Contact Center

Agent Portal Web  
Callback Contacts

Quick Reference Card

A31003-C1000-U133-01-7619


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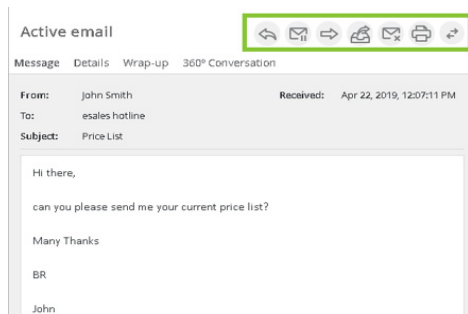
## Logging on receive emails

- To receive or send emails, you need to be logged on for the media type.
- Click on the gray Email icon: 
- You can obtain the system routed emails if you are in the available routing state.
- You can compose new emails regardless of your routing state.

## Receiving Emails




- The Active Contacts window is displayed when an email arrives.
- The email message is displayed on the first tab.
- You can use the information on the other tabs in a similar way as for Voice contacts.
- To edit the email, you can use the following buttons:

-  Answer - compose a reply
-  Defer - continue working on the email later
-  Transfer - transfer to an Agent, externally/consulting
-  Requeue - add to another queue
-  Discard - discard the email conversation
-  Print - print the email conversation



## Answering Emails

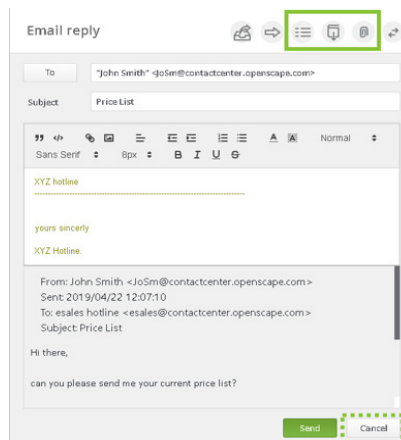
- When replying to an email, the "Cancel" button allows to return to the top level.
- You can simply enter a response message and use the formatting tools or use the following buttons:

-  Show address fields
-  Paste templates
-  Attachments

- When writing the answer, you can use the formatting tools available in the Toolbox.



- You can use the "Link" button to add hyperlinks to your email answer.
- Spelling and grammar check is provided by your web browser.



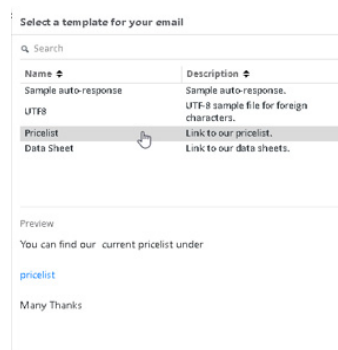
## Changing Address Fields

- You can use the "Display Address Fields" menu to select the address email fields you want to display or modify.



## Using Templates

- The "Templates" button allows you to use templates created by a manager.
- You can see a preview of the templates in the Email Templates window.



# Unify OpenScape Contact Center

## Agent Portal Web Email Contacts

## Quick Reference Card

A31003-P3000-U102-5-7619

03/2023

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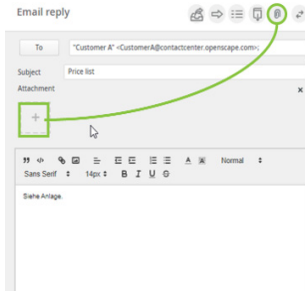


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## Attachments

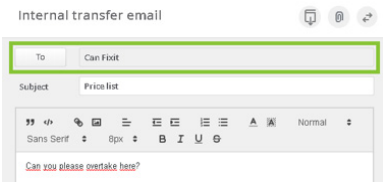
- The Attachments button displays the attachment area, at the bottom of the email.
- To hide the Attachments area, click "X".
- To add attachments from from your local storage, click "+".
- You can view or remove any attachments added.



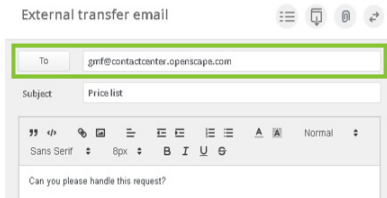
## Email Transfer

There are three options for email transfer:

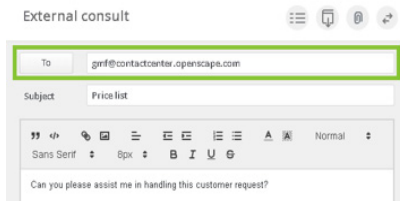
- Internal transfer - to another Agent



- External transfer - to an external party

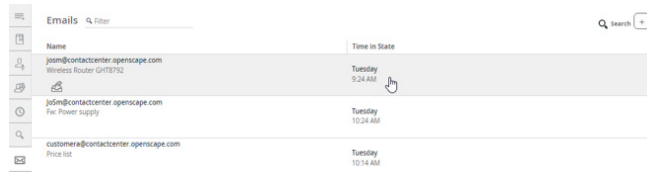


- External consultation - collaborate with external participants



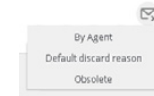
## Deferring and Resuming Emails

- To defer emails, agents can use the Pause button.
- Deferred emails appear in the Emails area and can be resumed using the Resume button.



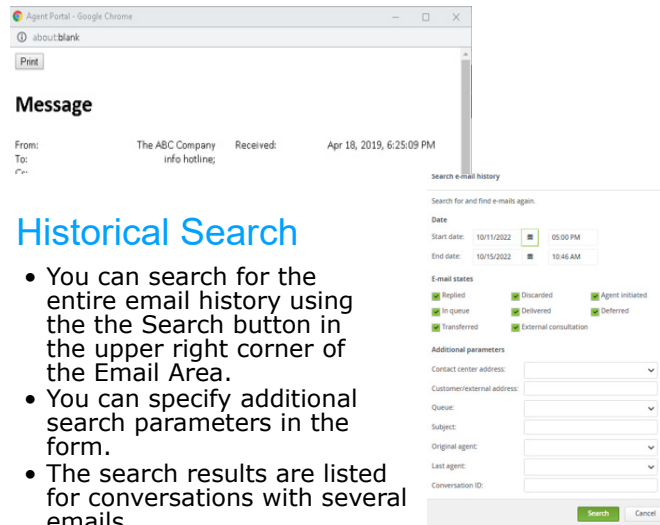
## Discarding an Email

- When discarding an email message, you need to specify the Discard Reason.
- You can still search for a discarded message in the Email area.



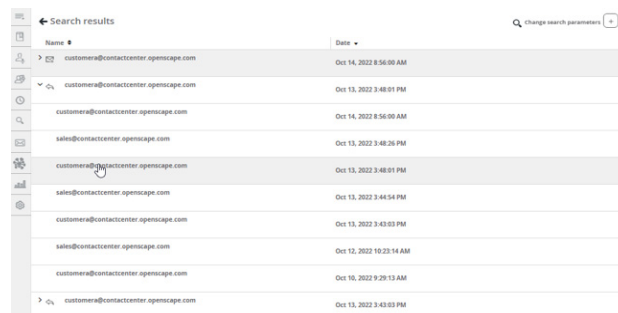
## Printing an Email

- You can print an email for a preview of it.




## Historical Search

- You can search for the entire email history using the the Search button in the upper right corner of the Email Area.
- You can specify additional search parameters in the form.
- The search results are listed for conversations with several emails.



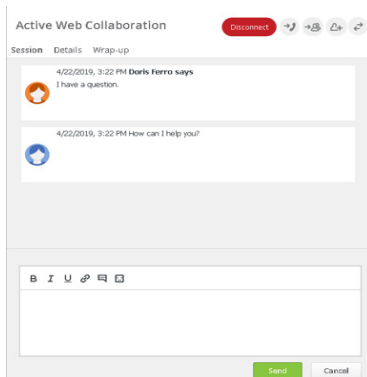
## Logging on receive Web Collaboration contacts (Chat contacts)

- To receive web collaboration contacts, you need to be logged on for the media type.
- Click on the gray Web Collaboration icon: 
- You have the option to receive the routed Web Collaboration contacts when you are in the available routing state.

## Receiving a Web Collaboration contact

- When the Active Web Collaboration window is displayed, you are in the response mode and you can compose your reply to the contact.
- You can use the following tools:

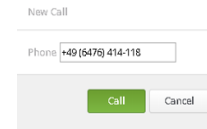
- ➔ Request Callback Number - opens a field to enter the customer's telephone number
- ➔ Transfer Chat - to Agent or to another queue
- ➔ Invite - ask another agent to join the chat session
- B** Bold - text format
- U Underline - text format
- I* Italic - text format
- 🔗 URL - adds a predefined URL, as defined in the Manager app
- 💬 Message - adds a predefined message, as defined in the Manager app
- 😊 Emoticon - adds an emoticon




## Direct Callback

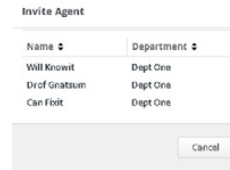
- For Direct Callback, you can request a phone number from the customer.
- Click the "Request Callback Number" button: ➔

- The New Call window is displayed in the Agent Portal Web.




## Inviting Agents


- You can invite other agents to participate in an existing session.
- Click the "Invite" button: 
- Invited users receive a complete copy of the meeting.




## Using Standard Messages

- A Standard Message reduces the time spent in answering web collaboration contacts.
- Click the "Message" button: 
- Select one of the predefined Standard Messages.
- The message is inserted in the message input area. You can edit, if desired, before sending.

## Using URLs

- You can send a URL, i.e. as a link to a website, paste it into a Web Collaboration message. When the contact receives the message, the URL will be displayed as a clickable link.
- To do this, click the "URL" button on the bottom of the Active Web Collaboration window: 
- The URL is added to your message.

## Using Emoticons

- Emoticons, i.e smiling face, are frequently used in electronic messages to convey an informal impression.
- Click the "Emoticons" button on the bottom of the Active Web Collaboration tab: 

# Unify OpenScape Contact Center

## Agent Portal Web Web Collaboration Chat

## Quick Reference Card

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Adding text

- To receive OpenMedia contacts, you need to be logged on for the media type.
- Click on the gray OpenMedia icon: ❄
- If more than one OpenMedia channel is configured in your system, you can select the channel from the drop-down menu.
- You have the option to receive the routed Web Collaboration contacts when you are in the available routing state.

Receiving an OpenMedia contact with real-time handling

Example: Facebook Messenger Chat

- You can recognize a real-time contact by the red "Disconnect" button.
- When the Active Contact Window for the OpenMedia Contact is displayed, you are in the response mode and you can write your reply to the contact.
- You can use the following tools:



Terminate the session - if the other party continues the conversation, a new session will be opened



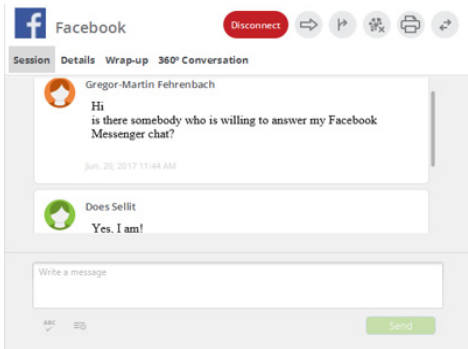
Transfer - select an Agent to whom you want to transfer this contact



Discard - discard the OpenMedia contact



Print - print the OpenMedia contact



Receiving an OpenMedia contact without real-time handling

Example: Facebook timeline post

- You can recognize a non-real-time contact by the absence of the "Disconnect" button.

- When the Active Contact Window for the OpenMedia Contact is displayed, you are in the response mode and you can write your reply to the contact.
- You can use the following tools:



Defer - continue working on this OpenMedia contact later



Transfer - select an Agent to whom you want to transfer this contact



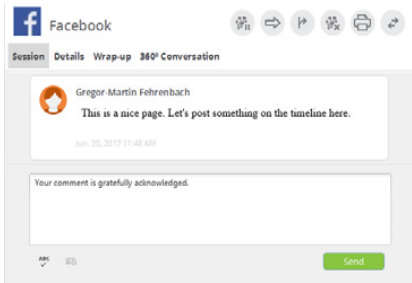
Requeue - select a queue to requeue the contact



Discard - discard the OpenMedia contact



Print - print the OpenMedia contact



Resuming a deferred OpenMedia contact

- Agents can use the Open Media Deferred Messages Tab to resume their deferred contacts.

OpenMedia Deferred Messages <span>Filter</span>				
Name	Arrival	State	Connector	
Gregor-Martin Fehrenbach	5:16 PM	Deferred	Facebook	

Unify OpenScape Contact Center

Agent Portal Web  
Open Media - Facebook

Quick Reference Card

A31003-S22B0-U105-01-7619

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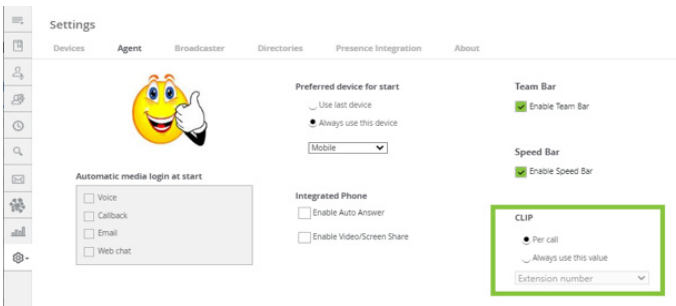
## About direct calls and CLIP

- OpenScape Contact Center allows you to include a CLIP when dialing from Agent Portal Web for direct calls.
- Possible CLIP numbers are stored for this purpose by the administrator.
- However, you must first select which CLIP numbers to use when making direct calls in your settings.

## CLIP settings in Agent Portal Web

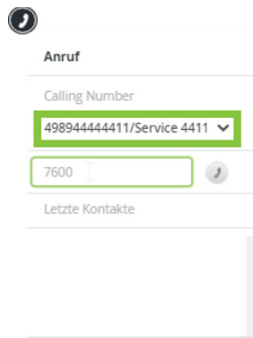
You can:

- Define a CLIP individually by call
- Take a CLIP permanently
- In addition to the CLIP numbers that your administrator has defined, the extension where you are logged on is also available.
- By default, this extension is always used.



## Dialing with the Call Button

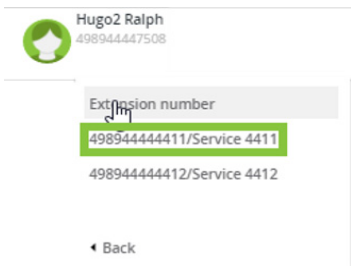
- When dialing directly with the call button, you have a drop-down menu in which you can select the CLIP.



- Agents can use the Open Media Deferred Messages Tab to resume their deferred contacts.

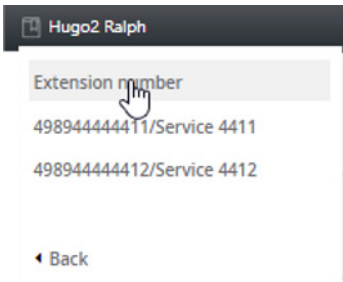
## Dialing from the Speed List

- When dialing directly from your Speed List, you have a drop-down menu, where you can select the CLIP.



## Dialing from the Speed Bar

- If you dial directly from your Speed Bar, you have a drop-down menu where you can select the CLIP.



## Dialing from the Directory Search

- When dialing directly from a result of your Directory Search, you have a drop-down menu in which you can select the CLIP.



# Unify OpenScape Contact Center

## Agent Portal Web Direct Calls with CLIP

## Quick Reference Card

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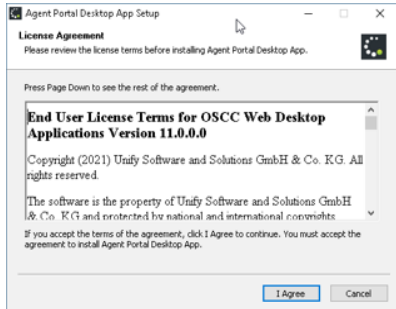
## Downloading the Desktop App

- The Agent Portal Web Desktop App runs Agent Portal Web in an Electron-JS environment instead of running it in a Web Browser.
- This allows additional operations on your desktop which are not allowed from within a web browser.
- Use the link below the login fields to download the Desktop App and start the installation.

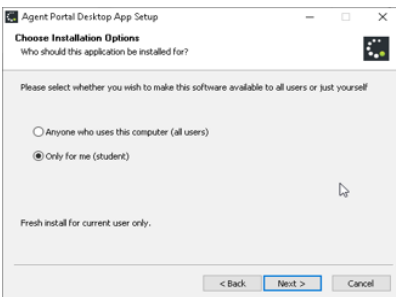
## Installing the Desktop App

For the installation, you need to do the following:

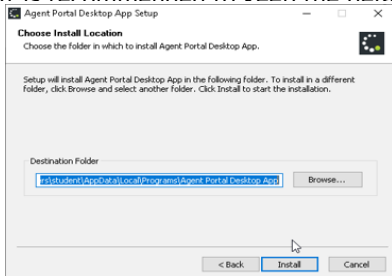
- Agree to the license agreement.



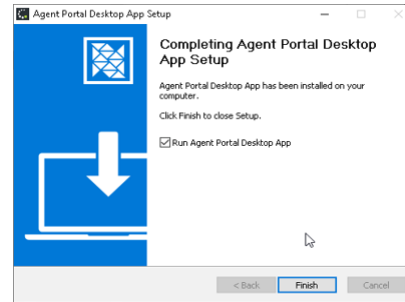
- Select an installation option:
  - Just for yourself: you do not need any special rights on your PC for this
  - For all users: to do this, you need full administrative rights on your PC. Contact your Windows administrator.



- Choose the installation directory. It is recommended to keep the default directory.

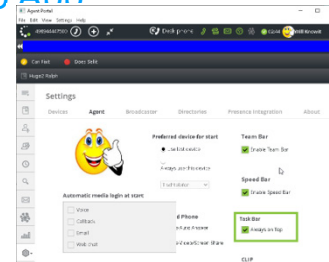


- Finish the installation.



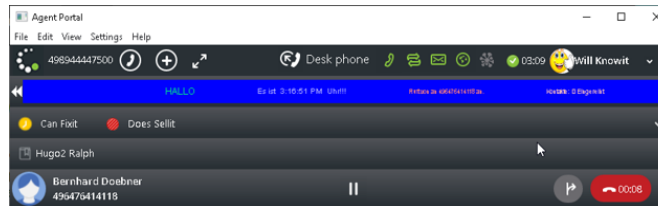
## Benefits of Desktop App

- Taskbar mode  
The taskbar mode takes up little space on the desktop and can always be kept in the foreground.
- Automatic opening of programs via the additional information



## Working with the Taskbar Mode

- The taskbar mode is activated via the "Taskbar mode" button:
- In taskbar mode, you can perform all phone call functions from the taskbar.
- The rest of the Agent Portal Web application is only displayed when needed or when you exit the taskbar mode.



## Unify OpenScape Contact Center

### Agent Portal Web Desktop App

### Quick Reference Card

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