HOSTED CONTACT CENTRE

AGENT CONSOLE GUIDE

Version 9.4
Revision 1.0

SaskTel | Business Solutions |

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PREFACE

SaskTel Hosted Contact Centre is the fastest and easiest way to deploy a world class contact centre.

Hosted Contact Centre makes it easy to manage all of your customer interactions – phone, email and chat - through a single system. Our award-winning solution is 100% web-based and was developed by industry-leading designers to be extremely easy to use, thus speeding the adoption process for both agents and supervisors. The Hosted Contact Centre includes all of the functionality you need to provide an exceptional customer experience: skills based routing, multi-media interaction management, IVR, CTI, case & contact management, call recording, real-time monitoring, desktop sharing, reporting, and much more.

This guide provides agents with the information necessary to use the Agent Console to manage customer interactions.

Depending on your subscription, some components described in this guide may not be included in your purchased subscription.

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GETTING STARTED WITH THE AGENT CONSOLE

The Hosted Contact Centre Agent Console enables agents to use a graphical user interface (GUI) to manage customer interactions.

If you are the primary contact centre administrator, SaskTel provides you with the information you need to access and configure your Hosted Contact Centre.

If you are an agent, your contact centre supervisor provides you with the information you need to access your Agent Console account, as well as your contact centre policies and guidelines for using that account.

Using Agent Console, contact centre agents can:

- Process interactions of all media including phone, chat, email, and voicemail.
- Process both inbound and outbound interactions.
- Track the status of agents and queues.
- Provide quick answers to customer questions using the FAQ knowledge base.
- Manage CRM data by integrating with local CRM or supported external CRMs.
- Collaborate with a remote desktop for real time assistance or co-browsing capabilities.

How to Use this Document

The Agent Console user guide provides a comprehensive overview of the primary tasks performed using the Agent Console. Your contact centre supervisor provides you with an overview of your duties as a customer agent, including the types of customer interactions you are responsible for.

When you log in to your Agent Console account for the first time, use this document to learn how to configure your account. Your supervisor will help you configure your Agent Console account so that it conforms with your contact centre's technical requirements and operational policies.

After configuring your Agent Console account, this document provides both overview and detailed information about processing interactions, managing your status, and working with customer, case and follow up records.

System Requirements

Each agent workstation requires the following:

- A dedicated physical phone or a softphone, such as Bria (Windows and Mac), that is available exclusively for handling Hosted Contact Centre phone interactions during working hours. See Changing the Agent Console Workplace Number on page 17.
- A computer equipped with one of the following browsers:
  - Internet Explorer 9, 10, or 11
  - Microsoft Edge browser
  - Chrome

- Firefox

For information about agent workstation technical requirements, see your contact centre supervisor, or refer to the Technical Requirements document.

Important: Compatibility View must be disabled in Internet Explorer 9 or older.

Note: Chrome and Firefox do not support the Collapse Window functionality in Agent Console.

WHAT IS NEW FOR AGENTS?

New features and enhancements to the Agent Console impact supervisors and agents. Some of these features are available to agents and supervisors by default, while others need to be enabled by administrators to benefit from the functionality.

The following list includes features and enhancements to our Agent Console:

- Co-browsing via Chat: Ability to initiate co-browsing via chat sessions.
- Improved Help interface: Agents can now access FAQs, user guides, and support page via the Help menu. They can also submit feedback about the product, using Help menu.
- Localization: We support European French and German languages.
- Browser Support: We support Microsoft Edge browser.

LOGIN

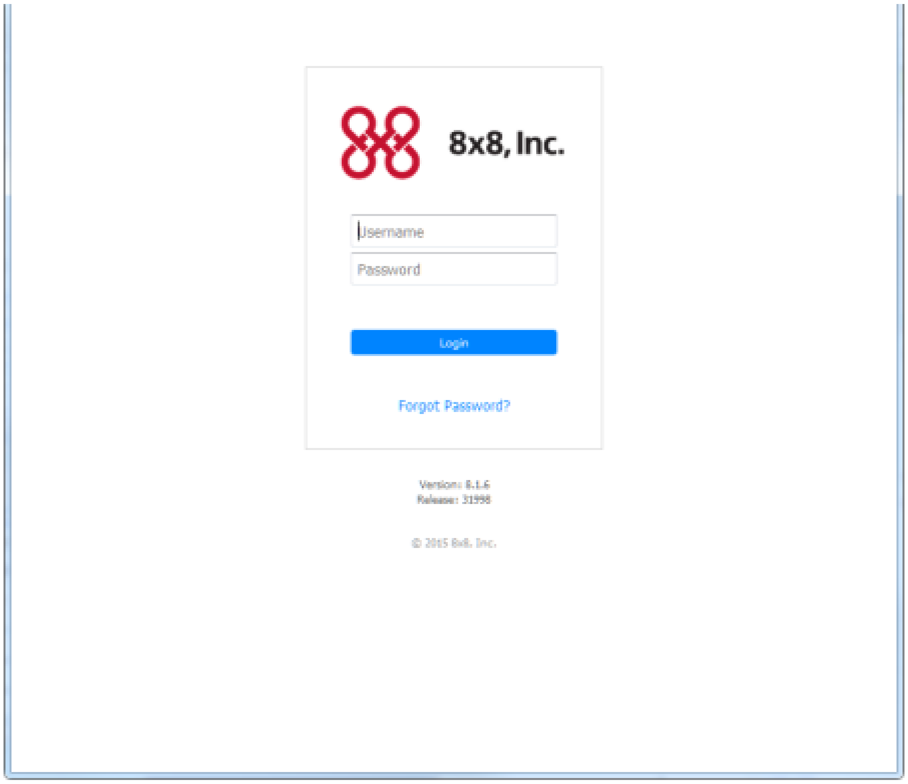
Your contact centre supervisor provides you with the URL, username, and password required to login to your Agent Console account.

Note: Based on the configuration of your Hosted contact centre, you may receive the login information through a system-generated email or from your supervisor manually. The login information includes Username, System Generated Password, and link to the Agent Console.

To log in to the Agent Console:

1. In your preferred browser, enter the URL for your Agent Console.

Figure 1: Agent Console: Login Screen



2. In the login page, enter your username and password. Click **Login**.

   By default, the Agent Console launches **On Break** status.

Note: Agent Console usernames and passwords are case sensitive. If your access to Agent Console is denied due to IP address restrictions, an automatic email is sent to your Hosted Contact Centre administrator. The administrator is then able to give you the access authorization.

3. Select **Available** or **Work Offline** status to initiate the session.

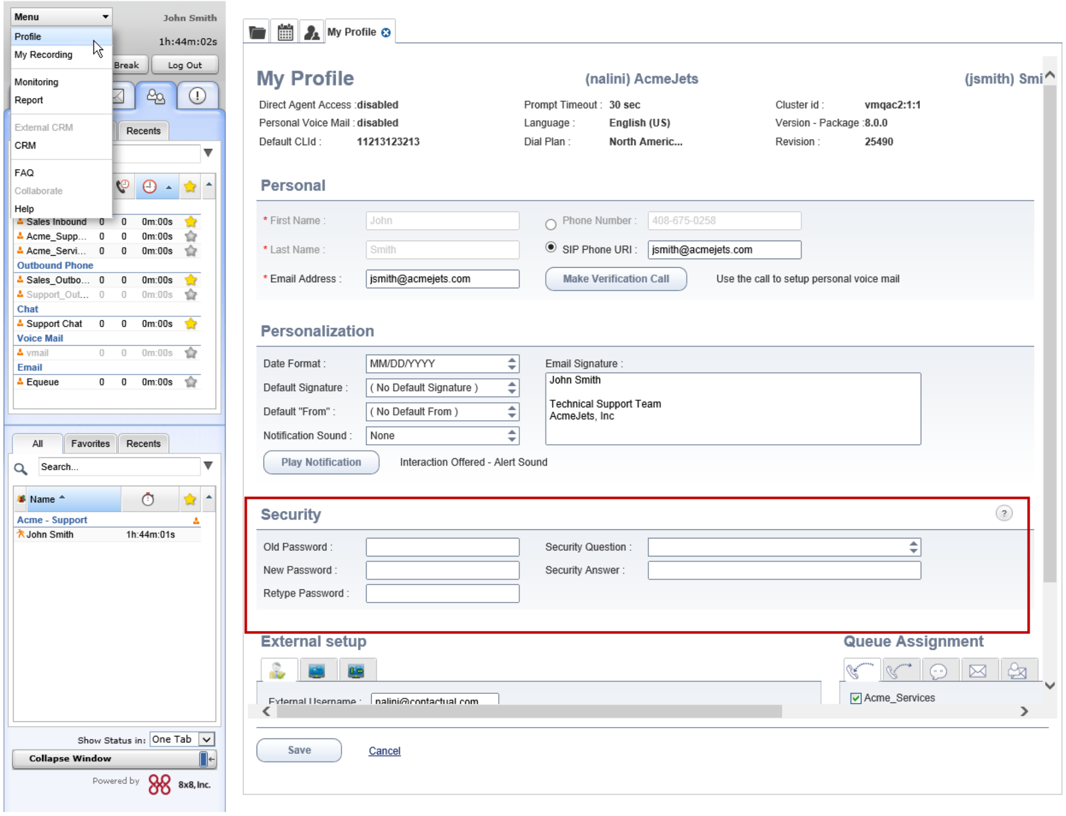
Your supervisor may also instruct you to update certain parts of your Agent Console user profile.

Create a New Password

To create a new password:

1. Log in to Agent Console.
2. Go to **Profile** from the Control Panel menu.

3. In the **Security** area, enter the old password.



4. Enter the new password.

   Note: Hover over  to know the password length.

5. Retype the new password and click **Save**.

   Note: If your password fails to meet the password criteria set by the administrator, a message prompts you to retype the password.

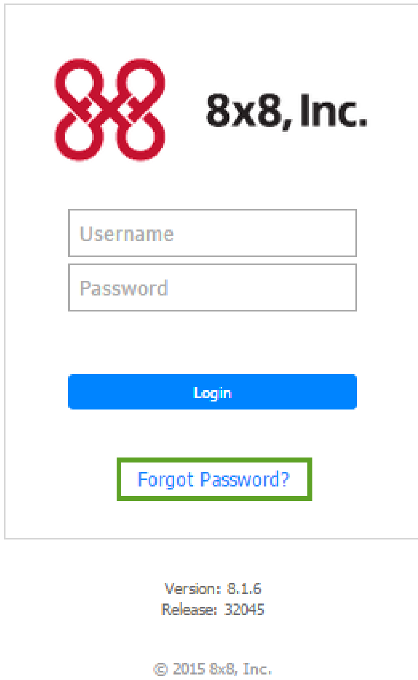
Your new password is activated from the next login session.

Resetting Your Agent Password

If you forget your password to log in to Agent Console, you can reset your password automatically by providing your username and tenant name. The new password is sent to the email address specified in your agent profile. If you have set up a security question and answer in your profile, a link to the security question is emailed to you. On answering the question correctly, you receive the reset password in an email. This additional step proves that the person requesting to reset the password is the one assigned to the agent account.

To reset your password:

1. Click **Forgot Password** in the login screen.



   A dialog box appears prompting for username.

2. Enter username in the textbox exactly as you would for logging in to Agent Console and click **Continue**.
   A message indicates a new password is sent to your email address with the required information to proceed.

   Note: A username can be in one of the two forms: *agent_id@tenant_id*, or if the tenant id is provided as a parameter in the login URL, username can be *agent_id*. Please confirm with your administrator if you are not sure.

3. Open your email and click the link in the email. A dialog box opens prompting for an answer to your security question.

   Note: If you have not set up a security question and answer in your profile, you receive a reset password in the email.

4. Enter your answer to the security question. If you answered the question right, a message including a reset password is emailed to you.

5. Open your email to obtain the system generated reset password.

Logging in with Reset Password

You are allowed to use a reset password to log in to Agent Console only once. Upon logging in to Agent Console with your reset password, you are prompted to change the password. If you fail to change the password, you are automatically logged out.

To log in with a reset password:

1. Open your email to obtain the system generated reset password.

2. Log in to Agent Console with the reset password. You are logged in successfully and prompted to change the password.
3. Enter a new password and click **Change** to proceed with the login.

Logging out of the Agent Console

Whenever you are not scheduled to work, you must log out of Agent Console. If you fail to log out, Agent Console reports your status incorrectly.

To log out of Agent Console:

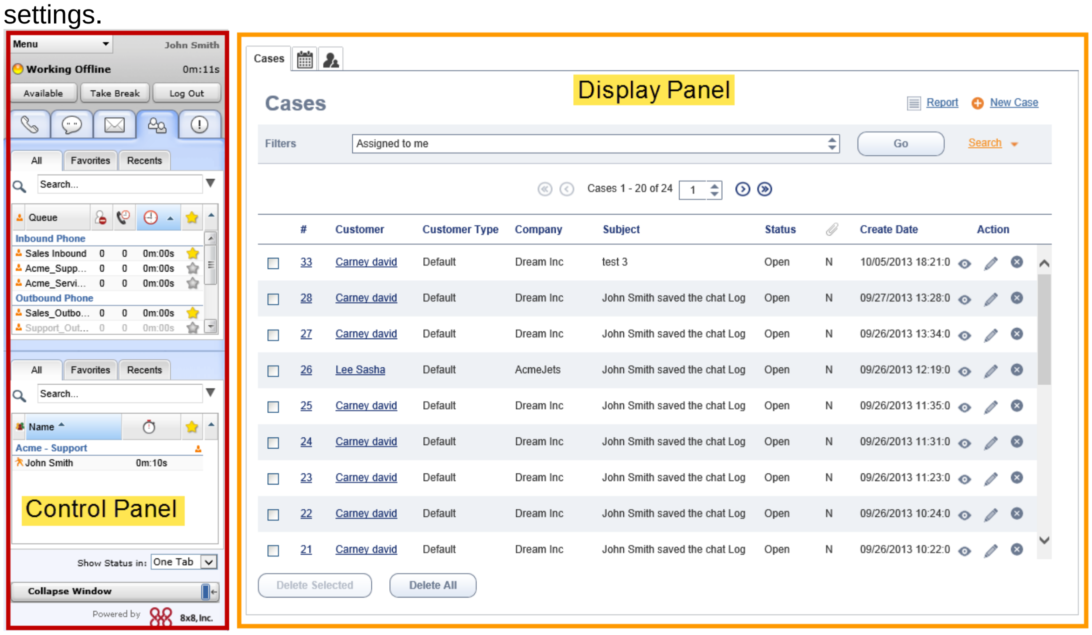
1. In Agent Console, click **Work Offline** or **On Break**.
   You must have the **Work Offline** or **On Break** status to display the option to **Log Out**.
2. Click **Log Out**.

   Note: Closing the browser containing Agent Console does not log you out. You must click **Log Out** in the control panel in order to log out of Agent Console.

OVERVIEW OF AGENT CONSOLE USER INTERFACE

The Agent Console interface is split into:

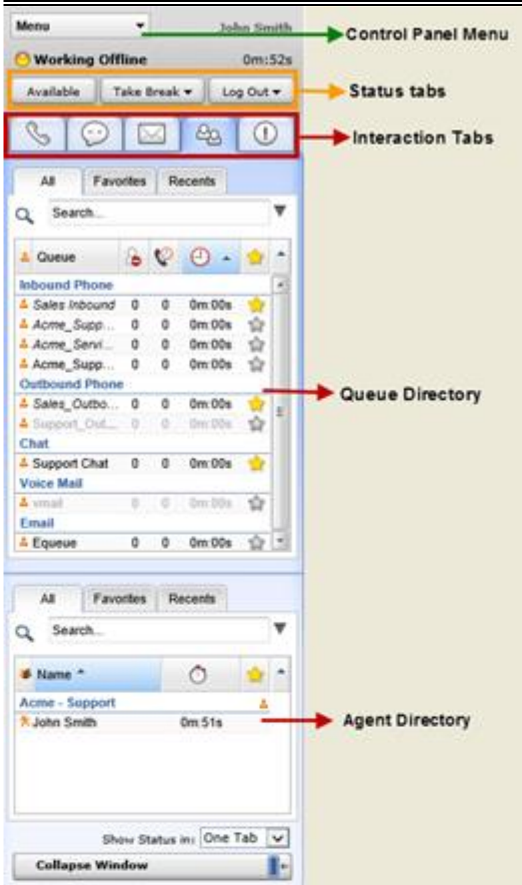
- **Control Panel**: Provides controls to process interactions in your contact centre and to manage agent status. For a quick look at the control panel functionality, refer to the Agent Console Quick Start Guide.
- **Display Panel**: Provides access to CRM data, profile settings, and message recording settings.



The following table gives a summary of the Agent Console user interface:

Functional Area	Description
1. Control Panel	Use the Agent Console Control Panel to access the

Functional Area	Description

	controls and status information, process an interaction, and work with Agent Console tools. Inside the Control Panel, use the Status tabs to maintain your agent status.
	
	Agent Console dynamically adjusts the Control Panel tabs in response to the interaction type and task you are performing. For example, phone interactions are processed using the Phone tab.
	
	- **Phone tab**: allows agents to manage phone interactions. All call handling functions such as making calls, placing a caller on hold, conferencing and transferring calls are performed using the Phone tab.
	- **Chat tab**: allows agents to manage chat interactions from customers or from other agents.
	- **Email tab**: allows agents to accept and respond to emails.
	- **Status tab**: displays agents, and queue information such as the number of calls waiting, calls in progress, and the status of logged in agents in your group.
	- **Notices tab**: allows agents and supervisors to post and receive informational notices.
	
	The Control Panel menu offers the following action items:
	
	- **Profile**: allows agents to view or edit their Agent Console account settings.
	- **My Recording**: allows agents to record messages to be played to customers.
	- **External CRM**: allows agents to initiate an integrated external CRM session.
	- **CRM**: allows agents to access cases, customers, and tasks from the local CRM.
	- **Collaborate**: allows agents to remotely connect to a customer computer with remote desktop control options and co-browsing capabilities. This features is available if your account includes the optional Collaborate feature.
	- **Co-browsing**: If enabled by an administrator, agents can invite customers for co-browsing during a chat session in Agent Console.
	- **Help**: allows agents to provide access to FAQ questions, links to our user guides, and, support. You can send your feedback directly; attach images or debug logs from the Help menu.
	    o **FAQ**: allows agents to access frequently asked questions and answers for repetitive use.
	    o **User Guide**: allows agents to access the product documentation and tutorial videos, and learn about

Functional Area	Description
	the latest features in a separate window. ○ **Support**: allows agents to access our knowledge base, articles, videos, support telephone numbers, and live chat. ○ **Send Feedback**: allows agents to send product feedback and suggestions directly to our developers, and attach images or debug logs from the Help menu. See Send Feedback. **Note:** The **Collapse Window** button at the bottom of Control Panel hides or shows the Display Panel. Chrome and Firefox do not support the Collapse Window functionality in Agent Console.
2. Display Panel	The Display Panel provides access to CRM data, profile settings, and message recording settings. The Display Panel opens with three default tabs and opens additional tabs for each menu action. ▪ **Customers**: lists your open case records by customer. ▪ **Cases**: lists your open case records. ▪ **Tasks**: lists the tasks assigned to you.

Send Feedback

In Agent Console, the Help menu provides access to FAQs, links to our user guides, and SaskTel Support. You can send your feedback directly, attach images, or debug logs from the Help menu.

To send feedback:

1. Log in to Agent Console.
2. Go to **Menu > Help > Send Feedback**.
3. Select an option from the drop-down menu:
   - **Report a problem**
   - **Enhancement ideas**
4. Write a description and click **Attach a file**.
5. Choose an image file from your computer directory.
   You can also drag and drop the file to the attachment box.
6. Click **Submit**.
   A log file is automatically sent to our developers.

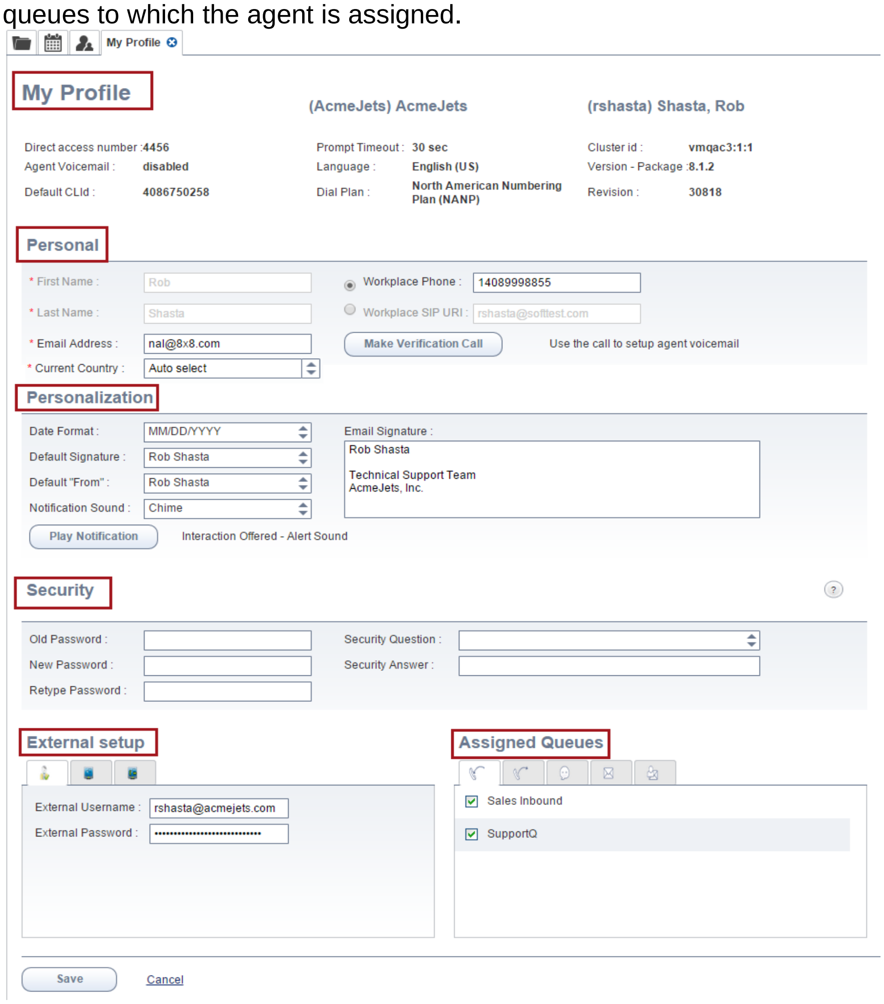
   Disclaimer: While we rely on your feedback and suggestions to improve our products, we do not guarantee a response from our developers. As always, we are committed to serving you better.

CONFIGURING YOUR AGENT PROFILE

Before configuring your account, the contact centre's management team must define a standard configuration for each type of agent that works in the contact centre. The contact centre administrator can then use those standard configuration values to guide the use of the My Profile page in Agent Console to configure a given agent's account.

The information in My Profile is organized under the following areas:

- **My Profile**: Presents information on agent name, display name, tenant name, tenant label, and product version and revision.
- **Personal**: Lets you view or edit email address and phone number, and make verification calls to the specified number.
- **Personalization**: Allows you to personalize your Agent Console with notification sound alerts, and specify the date format, default signature, default email signature, and more.
- **Security**: Lets you change your password to log in. You can also select a security question and input an answer to use to reset a forgotten password in the future.
- **External Setup**: Lets you define your login credentials to access your integrated External CRM.
- **Assigned Queues**: Specifies inbound and outbound phone, chat, email, and voicemail queues to which the agent is assigned.



Summary of Agent Profile Settings

The following table summarizes profile settings in Agent Console:

Agent Profile	Description
My Profile	Agent's name and ID used to log in to Agent Console are displayed. The following information is also presented under My Profile: - **Direct Agent Access**: If enabled, the agent can be reached directly via **Direct Access Number**. - **Direct Access Number**: Presents the extension number that can be used to reach the agent directly. Agents can communicate this number with their customers. - **Agent Voicemail**: If enabled, the agent is able to receive voicemail via email. The voicemail is left by the customers who try to reach the agent directly. - **Default CLId**: Displays the default caller ID for the agent's outbound calls. - **Prompt Timeout**: Indicates the duration of an interaction offered to the agent before it goes back to the queue. - **Language**: Indicates the language of the Agent Console application. - **Primary Language**: Indicates the primary language of the Agent. Agents are assigned with a primary language and one or more languages of fluency used during multilingual customer chats. See Handling Multilingual Chats for more details. - **Secondary Language**: Indicates the secondary language of the Agent used during multilingual customer chats. It is a language of fluency picked by the agent and in addition to the agent's primary language. See Handle Multilingual Chats for more details. - **Dial Plan**: Represents the system dial plan such as International Numbering Plan (ITU-T E.164). Dial plans take numbers dialed by users or originated from other Hosted Contact Centre components and apply editing rules to yield a valid number. - **Cluster id**: The cluster ID is used for system diagnostics. Provide this number to your support technician for system troubleshooting. - **Version Package**: Displays the Hosted Contact Centre version number. - **Revision**: Displays the Hosted Contact Centre revision number.
Personal	- **First Name**: Type the agent's first name. - **Last Name**: Type the agent's last name. - **Email Address**: Type the agent's email address. When the agent uses the CRM case management page to send an email, the agent can choose this email address as the **From** address for the message. - **Current Country**: Select a country from the list, if enabled by the administrator. - **Workplace Phone**: Designated number to process interactions in Agent Console. It can be the agent's desk phone, cell phone, or any other phone.

Agent Profile	Description
	• **Workplace SIP URI**: Specifies the SIP Phone URI of a VOIP phone. The SIP URI resembles an e-mail address and is written in the following format: **SIP URI = sip:x@y:Port** where x is the username and y is the host (domain or IP). • **Make Verification Call**: Places a test call to the specified phone number for verification. On answering the verification call, you can set up a voicemail greeting.
Personalization	• **Date Format**: Offers a choice of date formats to apply on all email notifications sent to and from the tenant. • **Default Signature**: Choose the default email signature used when sending email messages from the agent's account. When the agent uses the CRM case management page to send an email, the default signature appears as one of the choices in the Signature list. • **Default From**: Choose the default **From** address used when sending email messages from this account. When the agent uses the Local CRM to send emails to customers, the default address is automatically populated or appears as one of the choices in the **From** list. • **Interaction Sound**: Provides a choice of alert sounds to notify a new interaction. Select an interaction sound from the list and click **Play** to hear the notification sound. • **Chat Message Sound**: Provides a choice of alert sounds to notify a new chat interaction. Select an interaction sound from the list and click **Play** to hear the notification sound. • **Show chat message browser notification**: If enabled, the agent receives a browser notification on an incoming chat from customer. • **Email Signature**: Type the email signature for this account. When the agent uses the CRM case management page to send an email, the agent can choose to insert this Signature in the message.
Security	• **Old Password, New Password, Retype Password**: By default, the current password is listed for all three fields. If an agent wishes to change the password, they should enter the old password and new password, and confirm the new password. Hovering over the symbol indicates the password length defined for Agent Console. • **Security Question, Security Answer**: Selecting a Security Question and answer in the profile ensures that the person requesting to reset the password is the one assigned with the agent account.
External Setup	If Agent Console has been configured to interoperate with a third-party CRM, you must enter the login credentials the agent uses to access the third-party CRM in **External Username** and **External Password**.
Assigned Queues	The agent's queue memberships (inbound, outbound, chat, email, and voicemail) are displayed in **Assigned Queues** by default. If the Hosted Contact Centre administrator enables **Allow agent to change Enable/Disable settings in Assigned Queues** for an agent in Configuration Manager, the agent can use Assigned Queues to disable a queue's ability to offer interactions.

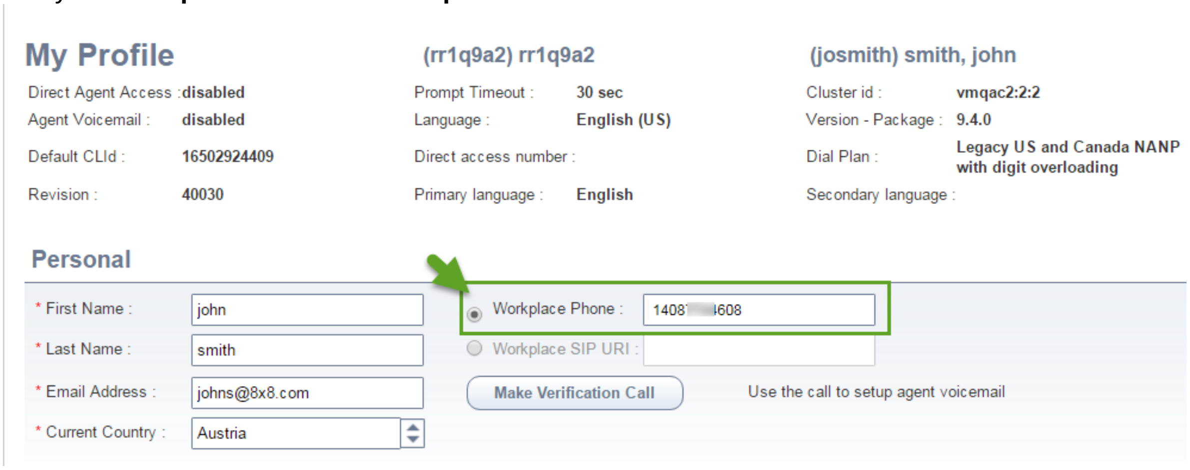
Changing the Agent Console Workplace Number

Your contact centre supervisor has configured your Agent Console account to conform with your contact centre's technical requirements and company policy.

Hosted Contact Centre allows you to use a hard phone, a cell phone, or a softphone (see Bria 4, Windows and Bria 4, Mac user guides) to process contact centre interactions. The use of a hard phone requires a phone number, while the use of a softphone requires a SIP URI. Your administrator specifies this information when setting up your account and determines if you can change this information in your agent profile. The Workplace Phone, under My Profile, identifies the phone number you use to process Hosted Contact Centre phone interactions. The Workplace SIP URI identifies your softphone. Based on the configuration of your account, you may be able to edit your phone number and the SIP URI. Learn more.[1]

To change your Agent Console telephone number:

1. Click **Work Offline**.
   Agent Console makes you unavailable for new interactions.
2. Go to **My Profile**.
   Agent Console displays the profile configuration page.
3. Enter your **Workplace Phone** or **Workplace SIP URI** under **Personal**.



4. Click **Make Verification Call** to verify if the phone works.
   For information about valid telephone numbers, see How to Format Your Telephone Number Entries.

Note: If you do not have the permission to change your phone number or the SIP Phone URI, the two fields are disabled.

[1]Do not change your Agent Console phone number unless directed to by your supervisor. If your supervisor directs you to change your number, possibly to respond to an emergency or to enable you to work in a different location, navigate to your agent profile, in the Personal text entry area, enter the phone number and save the new settings. You may use a traditional land line telephone, an IP Phone, or a softphone. If you use a hardware telephone, enter the telephone number here. This could be your cell phone, home phone, or desk phone offering the flexibility to function as an agent from virtually anywhere. If you use a softphone, configure the softphone, and enter the SIP Phone URI here.

Formatting Telephone Number Entries

Based on the dial plan implemented for your tenant, you may need to prefix your phone number:

- In the United States, the telephone format must be:
  <1> <three-digit area code> <seven-digit phone number>
- Outside the United States, the telephone format must be:
  Country Code phone number
- The telephone entries may contain optional dashes, spaces, or parentheses.

The following telephone numbers are valid entries in the United States:

- 5102592675
- 15102592675
- 1-510-259-2675
- 1(510)259-2675

Configuring Email Options

Your contact centre supervisor has configured your Agent Profile to conform with your contact centre's technical requirements and company policy.

To configure Agent Console email options, see Configuring Your Agent Profile.

Note: Do not change your Agent Console email settings unless directed to by your supervisor.

Configuring Your External CRM

If your contact centre is integrated with an external CRM such as Salesforce or NetSuite, you can access your external CRM account from your Agent Console by saving the login credentials necessary to access the account. Integrating with an external CRM enables you to expand the capabilities of the Hosted Contact Centre CRM, and to incorporate your existing CRM system data into your tenant's interaction processing workflow. The integration supports phone, voicemail, chat, and email channels allowing you to access data from external CRM through an integrated Agent Console.

Hosted Contact Centre now provides out-of-the-box integration with:

- Salesforce
- NetSuite
- Zendesk
- Microsoft Dynamics

To enable your agent account for external CRM Integration:

1. Log in to Agent Console.
2. Go to **Profile**.
3. Scroll down to the **External Setup** area. See External CRM Setup Summary table for details.
   The **External Setup** provides three tabs:

- ○ **Authentication Tab**: Allows agents to save CRM login credentials.
- ○ **Screen Properties Tab**: Allows agents to define screen pop properties such as opening a new window for screen pop.
- ○ **Window Properties Tab**: Allows agents to define size and position of the Screen Pop window.

  Note: The **Screen Properties** and **Window Properties** tabs are enabled only if the tenant administrator grants access privileges.

4. Enter your CRM username and password in the **Authentication** tab.

   Note: Salesforce requires you to add the security token to your password to authenticate access from an external application. Obtain your security token from the original Salesforce communication email or your Salesforce administrator.

5. Click the **Screen Properties** tab to view or change the settings.

   Note: The agent's ability to define Screen Pop window properties is available only for Salesforce, Zendesk and MS Dynamics integration.

6. Click the **Window Properties** tab to view or redefine the Screen Pop window properties.

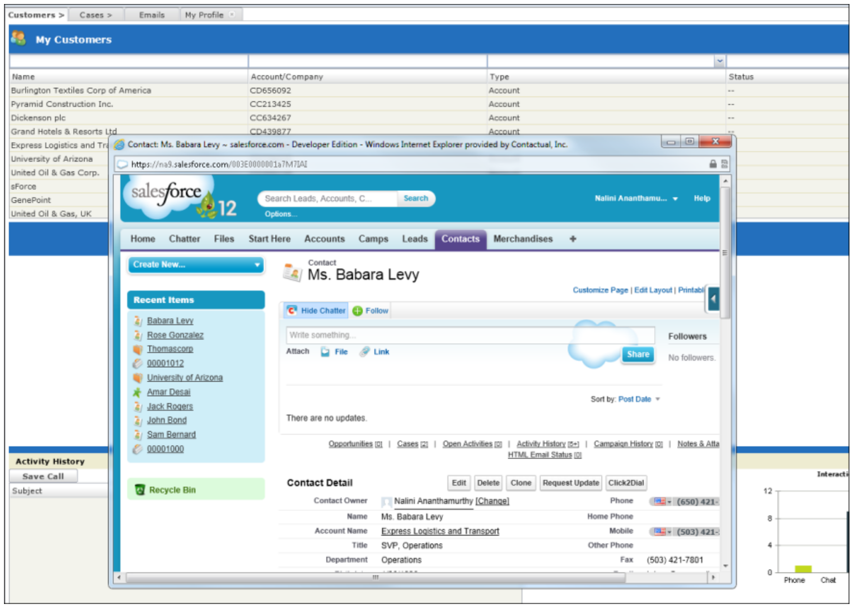
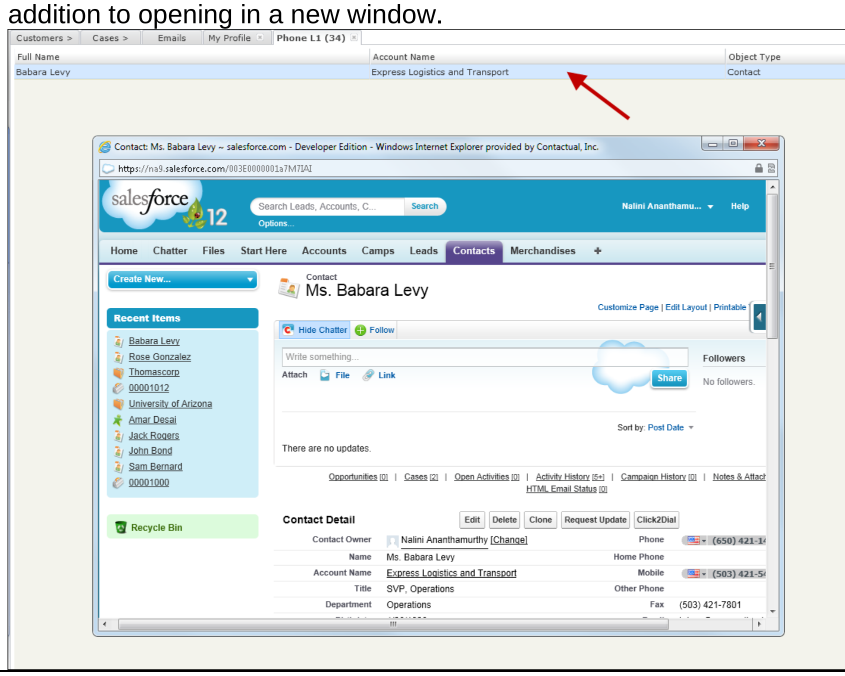
   Note: The agent's ability to define Screen Pop window properties is available only for Salesforce, Zendesk and MS Dynamics integration.

7. Click **Save**.
   Your settings help launch your external CRM from Agent Console.
   Your supervisor provides you with the information you need to access and work with your contact centre's external CRM product.

External CRM Setup Summary

The following table summarizes External CRM setup options under the Agent Profile:

Functional Area	Description
Authentication Tab 	▪ **External Username**: Enter the username or login ID to log in to your external CRM. ▪ **External Password**: Enter the password to log in to your external CRM.
Screen Properties Tab  **Note:** This tab is enabled only if the tenant administrator grants access.	▪ **Open new window for Screen Pop-up** This option allows agents to view interactions via Screen Pop in a standalone pop-up window instead of opening new tabs within Agent Console. If an interaction is connected to multiple records, a tab opens listing all matching records. You can click on a record to view the record details. If the option is disabled, launches the native CRM URL within Agent Console. Along with this option, two more options are available: ○ **Use single window only**: This option displays the Screen Pop in a new window and refreshes the same window to show new contact and call log information. If disabled, launches new contact and call log information in new windows.

Functional Area	Description
	○ **Hide result listing for single search result**: If an interaction fetches multiple matching records, a browser tab lists all matching records in a tabular format. Clicking on a record shows the record details. If this option is enabled, an interaction fetching a single matching record opens the record details in a new window and hides the result listing tab as shown below.  If this option is disabled, the matching single record lists in a tab in addition to opening in a new window. 
Window Properties Tab 	**Show toolbar**: ▪ Selecting Yes displays the Internet Explorer toolbar at the top of the standalone pop-up window. ▪ Selecting No displays the window without the Internet Explorer toolbar.

Functional Area	Description
Note: This tab is enabled only if the tenant administrator grants access.	**Note:** Show toolbar is not supported on IE9. **Size and Position**: ▪ In the text entry areas for width and height, enter the size of the screen pop window in pixels. ▪ In the top and left text entry areas, enter the screen position of the screen pop window's upper-left corner in pixels.

PERSONALIZING YOUR AGENT CONSOLE

You can personalize your Agent Console emails and chat by:

- Defining a date format for your communications, such as MM/DD/YYYY or DD/MM/YYYY.
- Creating a simple text-based signature, or a custom signature using HTML tags. If necessary, you can create multiple signatures but set up one as default for all your emails. You can insert a signature with a single click in your emails. See Insert Signatures in Description Box for details.
- Choosing a default **From** email address from the list, or select the email address for the inbound channel as default.
- Choosing an interaction sound for an interaction. The Interaction sound is an audio alert that can be heard when an interaction is offered to you. Click **Play** to listen to the sound.
- Showing a chat message sound or chat message browser notifications when receiving a chat message. Click **Play** to listen to the sound.

To personalize your email and chat:

1. Log in to Agent Console.
2. Go to **Menu > Profile**.
3. Make changes in **My Profile > Personalization**.

Viewing Agent Assigned Queues

Your contact centre supervisor has assigned you to one or more queues. You can process interactions from these queues.

In the My Profile page, the Assigned Queues area lists the queues that are assigned to the agent, grouped by media such as inbound, outbound, chat, email, or voicemail.

If you have the required Agent Console account permissions, you may block interactions from a queue by opting out of queue assignments as directed by your contact centre supervisor.

To opt out of a queue assignment:

1. Go to **My Profile > Assigned Queues**.
2. Select the desired media tab such as Inbound, Chat, or Email.
3. Clear the queue assignment check box in My Profile.
4. **Save** changes to your profile.
   Interactions from this queue are not offered until enabled again.

SETTING YOUR STATUS

Hosted Contact Centre allows you to change your status by selecting a status button in the Control Panel. When you are logged in to Agent Console, you may or may not be ready to accept new interactions. Choose a status that fits your situation:

- **Available**: In the Control Panel, click Available to receive new interactions and access all features. In this status you can use tools while waiting for a new interaction, and Agent Console is permitted to offer you new interactions.
  Agent Console automatically changes your status to **Busy** or **In Progress** when you:
  - accept an incoming interaction.
  - place an outbound call through a queue.
- **Busy or In Progress**: When your Agent Console status is Busy or In Progress, you are unavailable to receive new interactions. The amount of time you are allotted to accept an offered interaction is specified by your contact centre administrator when he or she configured the contact centre. When you are Busy or In Progress, Agent Console enables you to access all Agent Console tools.

  Note: The Configuration Manager administrator can allow agents to handle up to six chats with customers or an unlimited number of chats with other agents of the same tenant and at the same time.
- **Post-Processing**: When you complete an interaction, Agent Console automatically changes your status to Post-Processing. When your status is Post Processing, you are unavailable to receive new interactions. Use the Post Processing interval to perform any tasks required to finalize the interaction. The amount of time you are allotted to perform Post Processing is specified by your contact centre administrator when they configure the contact centre.

  Note: If you do not route an outbound call through a queue, your status remains unaffected. If your status is Available while placing an outbound call, you are open for incoming interactions.
- **Working Offline**: In the Control Panel, click **Work Offline** to prevent Agent Console from offering you new interactions, but you can retain the ability to access all features. Change your status to Working Offline, if you are processing the current interaction, updating the CRM data for a previously received interaction, or taking a break. Regardless of why you are Working Offline, Agent Console is not permitted to offer you a new interaction.
- **Take Break**: In the Control Panel, click **Take Break** to become unavailable to receive new interactions, and disable access to all features.

- **Log Out**: When you choose this status, you are logged out of Agent Console and do not receive any interactions.

The following table gives a summary of Agent Console tools and options available for each type of agent status:

Agent status	Description	Where to access?	Receive new interactions	Available statuses
Available	The agent is available to receive new interactions.	Click **Available** in the Control Panel.	**Yes**	• Work Offline • Take Break
Busy, **In Progress**	The agent is busy handling a queued interaction.	Automatically changes as soon as the agent accepts a queued interaction.	**No**	No other status is available during the **Busy** status until the agent finishes the transaction.
Post Processing	The agent has ended an interaction and is preparing to wrap up.	Automatically changes to Post Processing as soon as the agent ends the interaction.	**No**	No other status is available until the **Post Processing** time is out. The time is determined by your contact centre administrator.
Working Offline	The agent is not available to receive new interactions, but all the features are enabled and accessible.	Click **Work Offline** button in the Control Panel.	**No**	• Available • Take Break • Log Out
Busy (Stop New)	The agent has accepted a chat and chooses to stop new interactions to wrap up the chat session that is already in progress. This status blocks all queued interactions to this agent.	Click **Stop new** offered during Busy status. This button is only visible when the agent is handling a chat interaction. To receive more chats, click **Resume**.	**No**	No other status is available during the **Busy** status until the agent finishes the transaction.
On Break	The agent is not available to receive new interactions. Access to all features is disabled.	Click **Take Break** in the Control Panel. You are automatically placed on break when you reject a queued interaction. **Note:** The Control Panel becomes	**No**	• Available • Work Offline • Log Out

Agent status	Description	Where to access?	Receive new interactions	Available statuses
		unavailable when the agent changes the status to On Break.		

CHECK QUEUE AND AGENT STATUS

The Status tab in the Control Panel provides real-time information about queues and agents. It shows the number of interactions waiting to be served in a queue, the longest waiting interaction in a queue, the number of eligible agents in busy state, and the status of agents. Supervisors can check the status of queues and agents they supervise, and communicate with agents instantly via chat or call.

The Status tab organizes the status of queues and agents in separate tabs:

- **Queues Status**: View the status of queues you are a member of.
- **Agents Status**: View the status of other agents belonging to your group.

Ability to Search

Search and retrieve status about a specific queue or an agent instantly. The search is not case-sensitive.

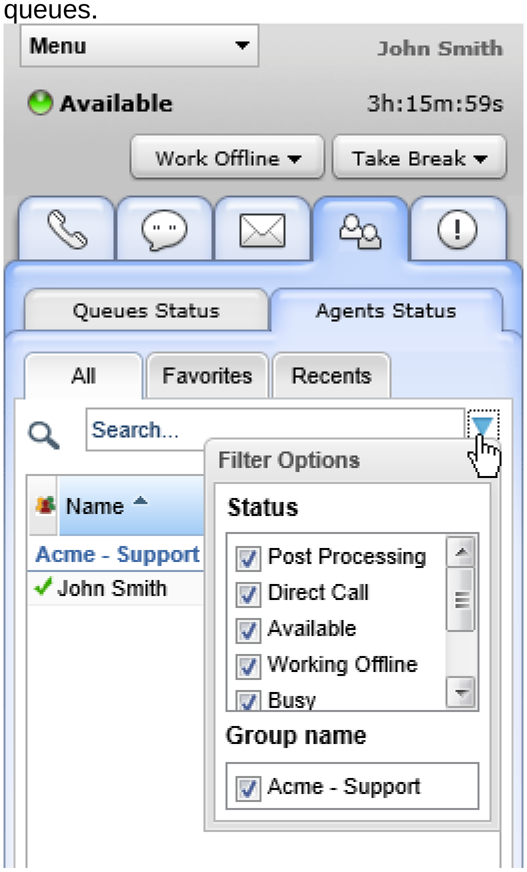
Ability to Filter Queues and Agents

Filter queue status information by queue relationship, member status, and media type.

Filter queues by:

- **Queue Relationship**: Supervised by you, or queues you are a member of.
  If you are a member you can filter by status:
  - **Enable**: You are a member of, and enabled to serve.
  - **Disable**: You are a member of, but disabled from serving.

- **Media**: media type such as: Inbound Phone, Outbound Phone, Chat, Email, and Voicemail queues.

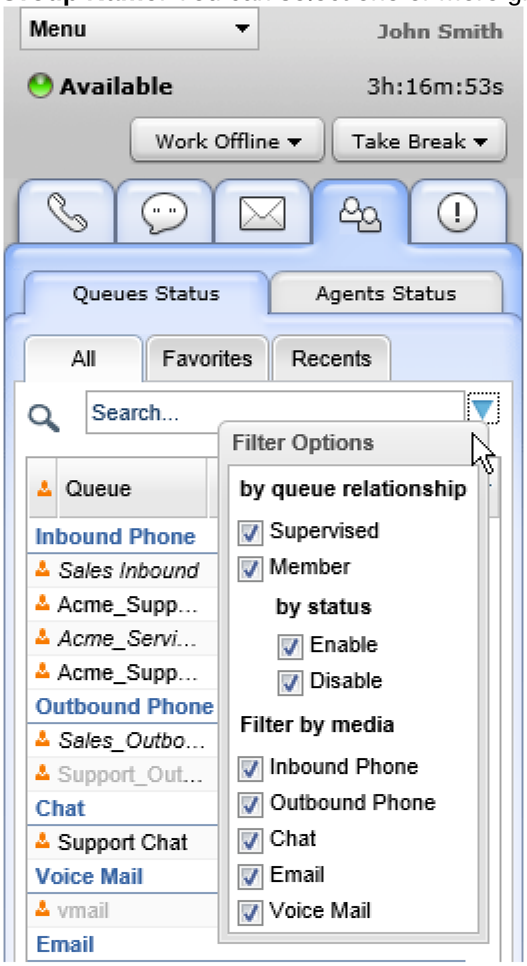


Note: If you are disabled from serving a queue, you can still view the status of that queue, but the queue appears gray in the directory.

Filter agents by:

- **Status**: you can select one or more statuses such as Available, Busy, Post Processing, Logged Out, etc.

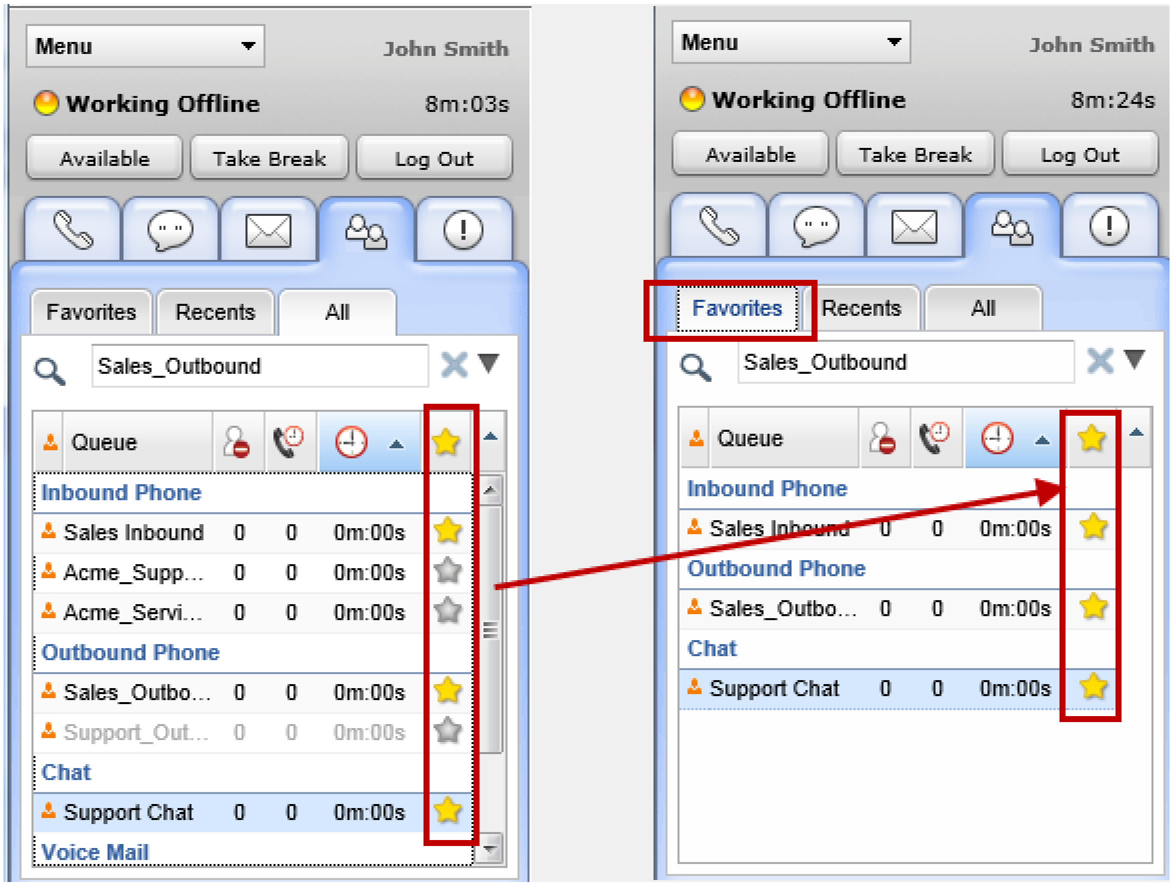
- **Group Name**: You can select one or more groups that an agent is affiliated with.



Note: The status shown in the Directory tab in Agent Console is retrieved from Virtual Office and not from Agent Console.

Defining Favourites

Bookmark agents you contact often and queues used often, and track their status every time you log in with just a click on the Favorites tab.
For example, you are one of five managers in the AcmeJets Support agent group. You manage seven team members out of the 50 members belonging to the group. You can mark these seven team members as your favorites and monitor their status with just a click, rather than sifting through the status of the whole team.



Tracking Recents

Using the **Recents** tab:

- Track those agents with who you initiated a call or a chat session in the past. The Recents tab lists those agents and displays their status. Your search results are stored locally.

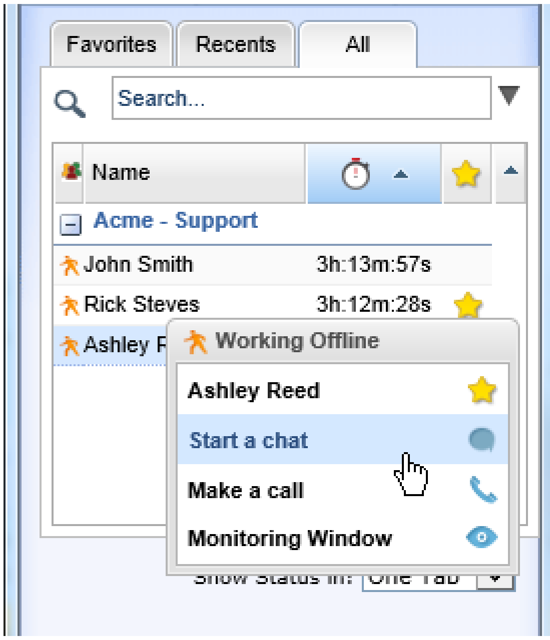
  Note: The Recents tab does not include participation in a chat or a call.

- Track the status of queues you transferred the calls to in the past.

Click to Chat or Call an Agent from the Status Tab

With just a single click, you can call or chat with an agent from the Status tab. In the Status tab for agents, right-click an agent in the panel for a context-sensitive pop-up menu with options to:

- **Start a Chat**: Initiate a chat with the agent.
- **Make a Call**: Place a call to the agent.
- **Monitor**: Monitor agent activity (Supervisor-Only Privilege).



WORK WITH CODES

Your contact centre administrator may set up different types of code lists serving a unique purpose. The codes are presented during an interaction if you are assigned to them. You may have to select one or more custom codes as your status changes or as you process interactions.

Such code lists include:

- **Status Codes**: Indicate the reason for your status change, such as choose attending a meeting as the reason you work offline.
- **Outbound Phone Codes**: Track the purpose of a call, or indicate the calling line ID of your outbound calls.
- **Transaction Codes**: Indicate the purpose of interactions, and record the outcome of each interaction.

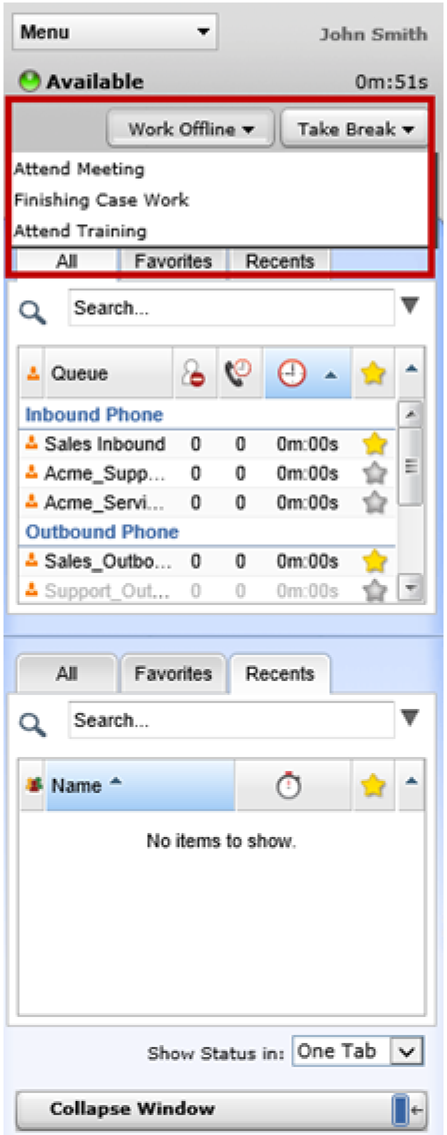
Your supervisor provides you with a list of your company's custom codes and explains when to choose a particular code.

Select Status Codes

If your Hosted Contact Centre includes the optional agent status codes feature, your contact centre administrator has created status codes that identify reasons for a status change. When you select a status change button, the codes show up prompting you to select one.

For example, if you choose to change your status by clicking Working Offline, Agent Console displays a list of reasons for working offline. Depending on your contact centre's code definitions, the reasons may be: attend meeting, attend training, or finishing case work. You must choose a Status Code before you can complete the status-change operation.

The procedure in this section assumes your Agent Console includes the optional Status Codes feature.



To choose a status code:

1. In the Control Panel, click a Status button such as Work Offline.
   For general statuses, see Setting Your Status.
   Agent Console displays a list of status codes for the selected status.

2. Select a code from the list. Your status changes to the desired state.
   The Agent Console applies the status. The status and associated status code appear in the contact centre's historical reports.

Selecting Outbound Phone Codes

Outbound Phone Codes are used for tracking the purpose of a call, or for setting a custom Calling Line ID before dialing out. For example, if your Contact Centre provides services to multiple companies on the same tenant but on different channels, you must ensure the correct caller ID is applied to each company so that the customers have the best callback experience. Your contact centre administrator may define outbound phone codes to assign caller ID to outbound calls from your tenant. If you are assigned to an outbound phone code list, you are presented with the list when you dial out. You have to select a code to apply the right calling line ID.

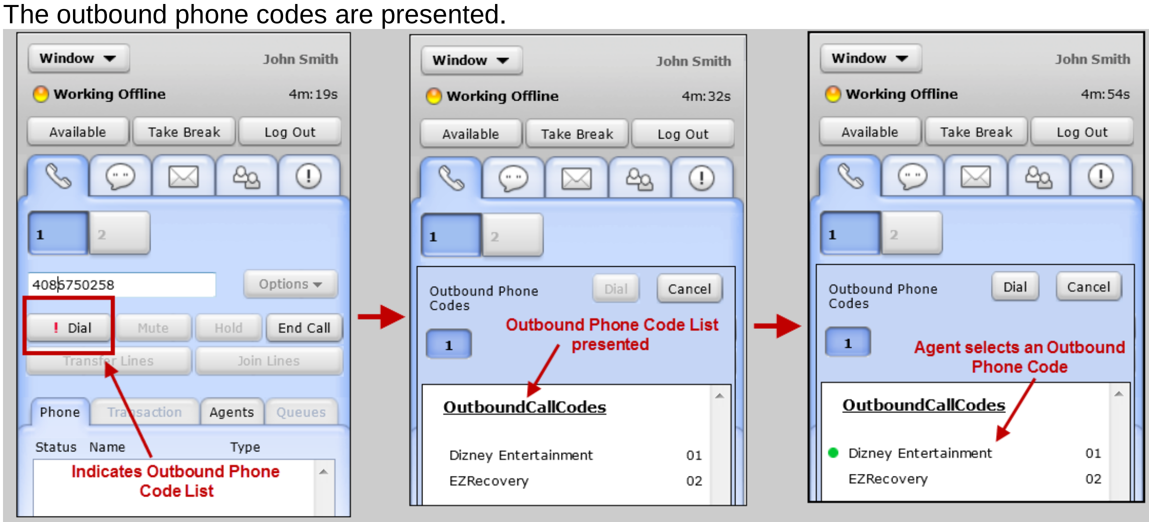
Note: Assigning calling line ID is not supported by all telecommunication carriers.

Using the Outbound Codes functionality, an agent assigns a calling line ID to an outbound phone call from the predefined list before initiating the call.

Hosted Contact Centre allows you to assign tenant channel numbers, special request numbers, or anonymous calling line ID to outbound calls by selecting an appropriate code.

To select Outbound Phone Codes:

1. In the **Phone** tab, enter a telephone number, and click **Dial**.
   The outbound phone codes are presented.



2. Select a code from the list, and click **Dial**.
   The calling line ID associated with the code applies to the call and the call dials out.

Use Keyboard Shortcuts

In a contact centre environment, the time taken by agents to process calls is critically important. During a call, agents may be required to browse multiple code lists and select the desired code(s) for each call. This process is time consuming. The keyboard shortcuts for codes minimize the time spent selecting the codes by reducing the number of clicks in the call flow. This feature is useful when the agent knows the code selection and does not have to go through the lists to make choices.

The keyboard shortcut for Outbound Phone Codes is **F2 d nn** (sequentially, where **d** is outbound phone code, and **nn** is code number). Within each code list, each code is numbered from 01 onwards. To select a second code in the list, press **F2 d 02**.

Note: The keyboard shortcut works with one set of Outbound Phone Codes only. It does not support more than one set of codes.

To select an Outbound Phone Code using a keyboard shortcut:

1. In the Phone tab, enter a telephone number, and click **Dial**.

2. Type **F2 d** to bring up the Outbound Phone Code list, and then type the desired code number or select the desired code.
   OR
   Type **F2 d nn** to select the desired outbound phone code from the code list, where **nn** is the code number.
   The desired code is selected and the call dials out.

Note: While selecting a code using the shortcut, always choose lowercase **d** or **t**. Enter the number as 01, not 1.

The following table gives examples of acceptable and unacceptable keyboard shortcut keys:

Outbound Phone Codes Keyboard Shortcut	Acceptable Format
F2 d 01	Yes
F2 D 01	No
F2 d 1	No

Selecting Transaction Codes

Transaction codes are mainly used to:

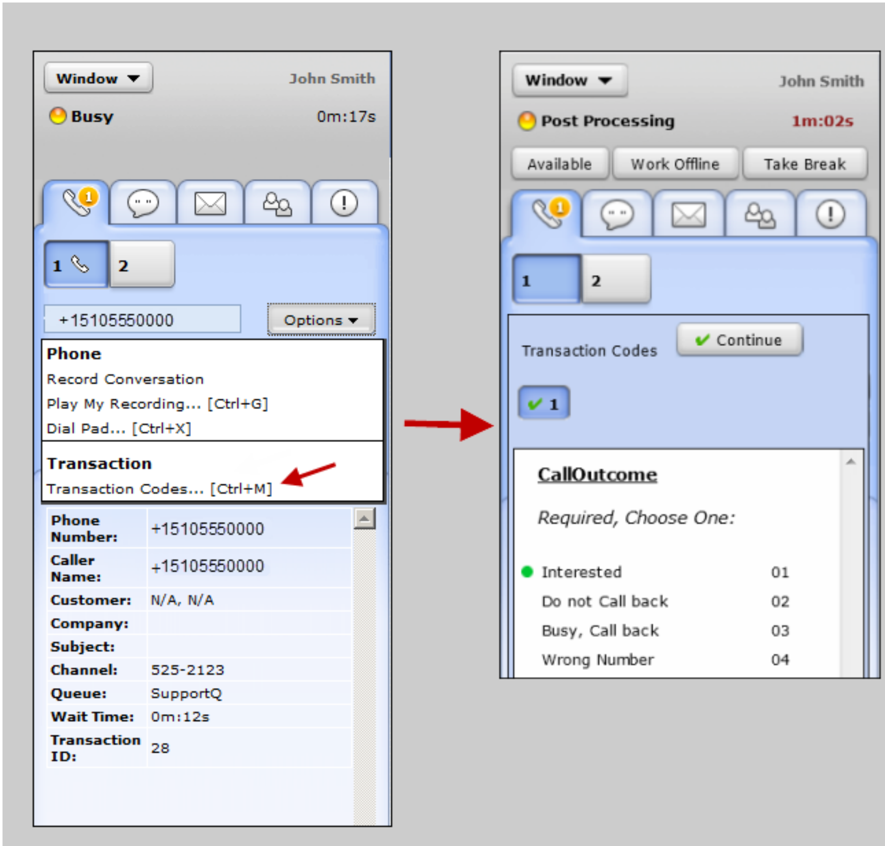
- State the purpose of interactions
- Indicate the outcome of inbound and outbound interactions

For example, an ACME Sales representative processing a sales campaign for a new product, places outbound calls to prospect customers. He can record the result of each interaction with predefined transaction codes, such as: Successful Sale, Prospect Interested - Call back, Prospect not Interested - Do not call back, Reached Voicemail, Faulty Number, and more. Further in the sales process, you can define transaction codes to identify various stages of the sales process, and apply the codes to convey the status and result of each interaction.

If your Hosted Contact Centre includes the optional transaction codes feature, your contact centre administrator creates transactions codes that identify call disposition.

Optional vs. Required

Codes can be configured to be optional or required. If your contact centre administrator configures a code list as mandatory, as you process interactions, you are required to select transaction codes. You can end processing a call only after selecting the desired codes.

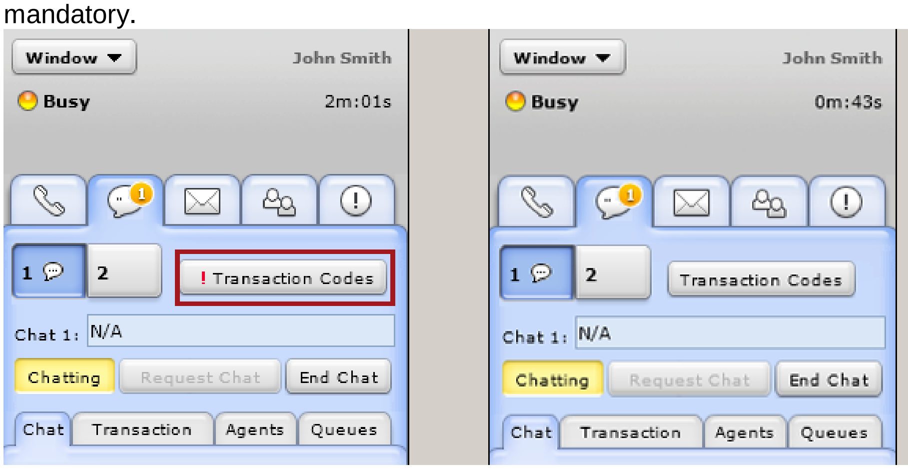


If your administrator configures a code list as optional, as you process interactions, you have the flexibility to skip codes selection.

To select transaction codes during a call:

1. During an active call, go to **Options > Transaction Codes**.

   Note: The Options button or the Transaction Codes button indicates when the code list is mandatory.

   The code list assigned to the queue or the agent group appears.

2. Select the desired code(s) and click **Continue**. The code is assigned to the call.

Note: If you end the call without selecting a mandatory code, the call stagnates in the post processing mode. Clicking **End Post Processing** brings up the code list, forcing a selection.

Agent Console applies the code and allows you to begin processing the new interaction. The transaction code gets logged in the contact centre's historical reports.

Use Keyboard Shortcuts

In a contact centre environment, the time taken by agents to process calls is critically important. During a call, agents may be required to browse multiple code lists and select the desired code(s) for each call. This process is time consuming. The keyboard shortcuts for codes minimize the time spent selecting the codes by reducing the number of clicks in the call flow. This feature is useful when the agent knows the code selection and does not have to go through the lists to make choices.

The keyboard shortcut for Transaction Codes is **F2 t nn** (sequentially, where ***t*** is the transaction code, and **nn** is the code number). Within each code list, each code is numbered from 01 onwards. To select a second code in the list, press **F2 t 02**.

Note: The keyboard shortcut works with one set of transaction codes only. It does not support more than one set of codes.

To select a transaction code using a keyboard shortcut:

- During an interaction, type **F2** and then **t**, sequentially, to bring up the Transaction Code list, and then select the desired code.
  OR
- Type **F2 t nn** to select a desired transaction code where **nn** stands for the transaction code number in the list. The code is automatically saved.

Note: While selecting a code using the shortcut, always choose lowercase **d** or **t**. Enter the number as 01, not 1.

The following table gives examples of acceptable and unacceptable keyboard shortcut keys:

Transaction Codes Keyboard Shortcut	Acceptable Format
F2 t 01	Yes
F2 T 01	No
F2 t 1	No

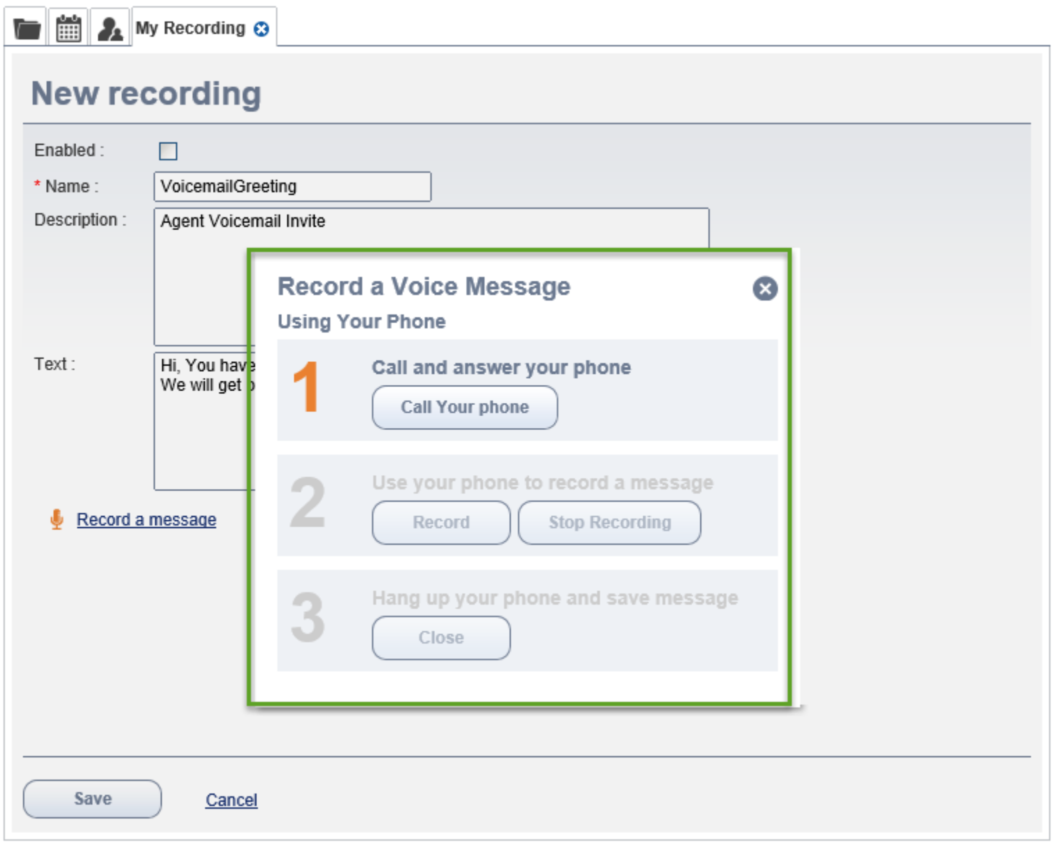
RECORDING AGENT MESSAGES

The Agent Console allows you to record up to ten messages and play them during an inbound or outbound call. When you place an outbound call and reach voice-mail, you can choose to play your pre-recorded message, such as a campaign message, and hang up. The application plays the message and terminates the call. If you have direct agent access, you can record a personal voicemail greeting to be played to callers.

Note: To record a message from your phone, your phone must be entered in your profile.

To record a message:

1. From the Control Panel, select **Menu > My Recording**. Agent Console displays the **Voice Pre-Recordings** panel.
2. Click **New Recording**.
3. Enter the following information:
   - **Name**: to identify the voice message in the Name entry area.
   - **Description**: to state the purpose of the message in the Description entry area.
   - **Text**: to write the script of the message.
4. Select **Enabled** to play this message during a call.
5. Click **Record a Message**.
   A dialog box appears indicating the following steps to record a voice message:



a. Click **Call Your Phone**. Your phone rings. When you answer the call, you are prompted to record your message after the beep.

b. Click **Record** and say your message.

c. Click **Stop Recording** to end the recording. The recorded message is played to you. If you are not satisfied with the recording, you can re-record the message by clicking **Record** or by pressing 1 on your phone key pad.

d. Hang up the phone and click **Close** to close the pop-up dialog box.

6. Click **Save**.
   A list of voice recordings appears.

   Note: You can play your message and record it again by clicking **Re-record a Message** in the edit mode.

OVERVIEW OF PROCESSING INTERACTIONS

All interactions flowing into the Hosted Contact Centre are channeled through queues. The queues in turn direct them to agents based on the skill level and availability. An agent has to be a member of a queue to receive any interaction from the queue.

Your contact centre supervisor assigns you to one or more queues supported by Hosted Contact Centre:

- Phone
- Voicemail
- Chat
- Email

Each type of queue corresponds to a type of Agent Console interaction. Interactions are the customer requests for information or assistance. You can use your Agent Console to process the interactions. The Control Panel in Agent Console features a separate interaction tab for each media type. The Status tab provides real-time status on agents and queues.

Notification Alerts

In Agent Console, agents can receive sound and web notification alerts for incoming interactions and avoid missing interactions when the application is not in focus.

- **Sound notification alert**: An audio alert for incoming interactions. You hear this audio alert when an interaction is offered to you. You can play to check the notification sound. See Personalizing Your Agent Console for details.
- **Web notification alert**: While in the Available state, if you have moved away from the application temporarily, the web notification alerts you of incoming interactions. Click a notification to bring Agent Console back in focus to handle the interaction.

In order to receive web notification alerts for incoming interactions, your browser must be either:

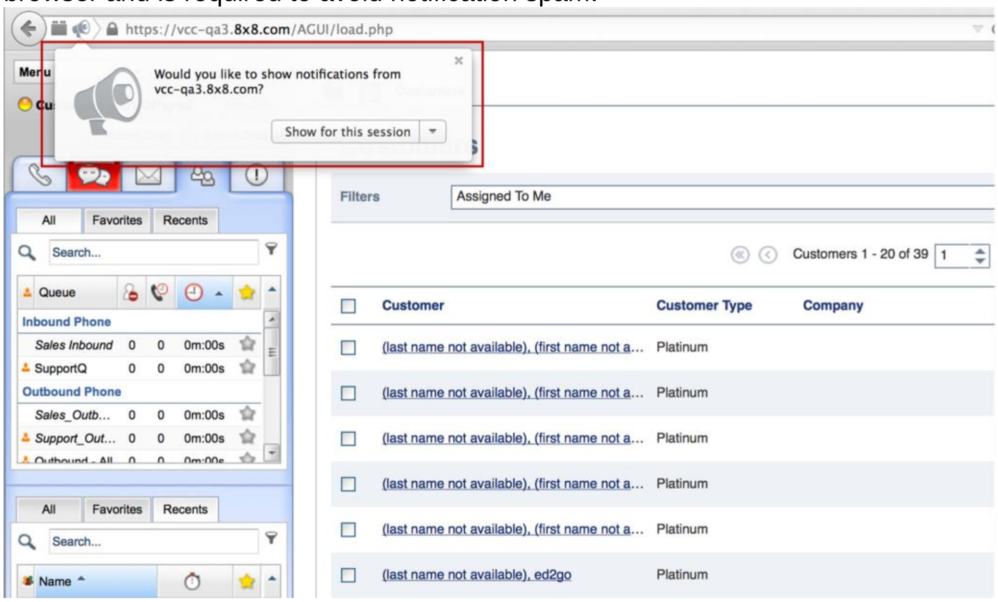
- Google Chrome 22+
- Mozilla Firefox 22+

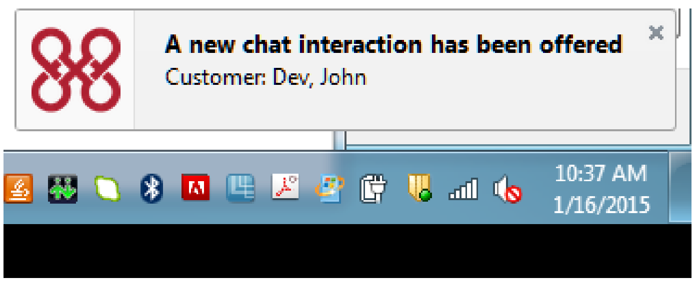
Limitations

- Internet Explorer does not support web notifications.
- Firefox closes web notifications automatically after a few moments. This is a browser limitation.

How it Works?

1. The first time an agent receives a new interaction, they are prompted to allow or block interaction notifications from the application domain. This prompt may vary from browser to browser and is required to avoid notification spam.





Notes:
- If an agent disables the display of notifications but later changes their mind, they must manually re-enable it in the browser preferences, as the prompt is presented only once.
- Prior to Chrome version 37, the prompt is triggered by user actions such as mouse or keyboard events.

2. If the agent accepts to be notified by the application, a notification pops up whenever a new chat, email, phone or voicemail interaction comes in. The behavior and appearance of notification depends on the browser and operating system from which they are triggered.

Note: Chrome shows up to three notifications at a time; older notifications must be dismissed to give place for newer ones. All notifications can be read by clicking the Chrome notification icon in the system tray (Windows) or menu bar (Mac). The behavior varies depending on the browser and OS combination.

3. Each notification displays the interaction type in its title, and the customer name (if any) in its body. The agent can then click the notification to bring Agent Console back in focus. This behavior may vary depending on the browser and OS used.

Note: Clicking the notification does not accept or reject the interaction. The agent must handle the interaction manually.

Manage Multiple Tasks

The multi-tabbed interface in Agent Console gives the flexibility to manage multiple tasks. For example, if you are making some changes to your profile and do not want to block any interactions, you can keep your status as Available. Accepting a new interaction triggers a screen pop in a separate tab without interrupting the changes to your profile.

PROCESS PHONE INTERACTIONS

Most contact centre agents are assigned to one or more phone queues. Phone queues prioritize and deliver phone interactions to agents whose status is Available, and who are assigned to an enabled queue. See Setting Your Status for available agent statuses.

The Agent Console phone controls allow you to:

- Accept inbound phone interactions.
- Record phone interactions (if settings permit).
- Transfer phone interactions to different agents, phone numbers, or phone queues.
- Initiate outbound phone calls.
- Set up a multi-party phone conference.

To learn about opting in or out of queue assignments, refer to Viewing Agent Assigned Queues.

Inbound Phone Call Flow

Calls flowing into Hosted Contact Centre stay in a queue until an agent is available. When an agent changes their status to Available, the longest waiting call in the queue is offered to the agent. Hosted Contact Centre searches the Local CRM database for existing records based on caller ID, account number, case number, or any arbitrary data passed during the interaction. Searching based on arbitrary data requires customization of the CRM workflow and external IVR (eIVR).

If the caller is an existing customer, the relevant customer or case record is presented to the agent through screen pop. Screen pop of matching data occurs either before or after an agent accepts an interaction, based on the screen pop settings configured by contact centre administrator. The agent processes the call and selects transaction codes to indicate the call disposition. Selecting transaction codes may be optional or mandatory based on the settings. On ending the call, the agent gets post-processing time for a final wrap-up before the call terminates. If codes are mandatory, the call stays in post-processing mode until codes are selected.

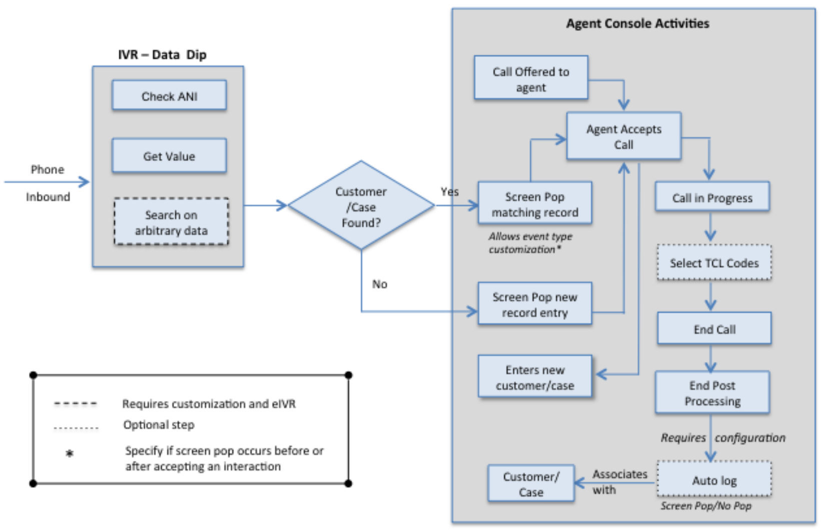
At the termination of the call, Hosted Contact Centre may create an auto call log. If the administrator has configured an auto log, one of the following auto log events occurs:

- Screen pop auto log in view mode
- Screen pop auto log in edit mode
- No screen pop

Note: Interaction auto logs require administrator configuration.

The sequence of events in an inbound call flow may be represented as follows:

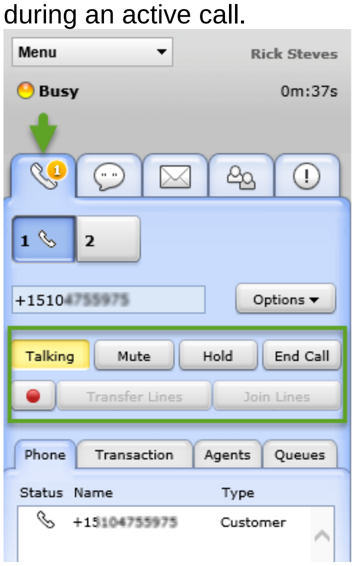
Inbound Phone Call – Local CRM Workflow



1. A call enters VCC
2. IVR collects caller's data - ANI, get value, arbitrary data
3. Searches the local CRM database for matching records
4. Matching data found - presents records using Screen Pop
5. If none found - prompts for a new record entry
6. Agent accepts call
7. Agent processes call
8. Agent selects TCL codes -
9. Agent ends call
10. Post processing ----> Call terminates.
11. Auto log (if configured)

Overview of Phone Controls

The Phone tab in the Control Panel provides all controls required to process both incoming and outgoing phone interactions. The availability of the controls dynamically adjusts to the configured privileges and the processing state of an interaction. For example, when an agent accepts an incoming call, controls such as Hold, Mute, and End Call get enabled. If an agent has the privileges to control call recording, then controls to stop and resume call recording are enabled during an active call.



The following table summarizes the various phone controls, and their purpose and availability:

Phone Control Button	Purpose
Dial/Talking	Enter a destination phone number in the number field, and click **Dial** to

Phone Control Button	Purpose
	initiate an outbound call. Talking button appears during an active call instead of Dial button.
Mute	Mutes self during an active call.
Hold	Places an active call on hold.
End Call	Ends an active call after selecting mandatory transaction codes, if any.
Transfer Lines	Transfers calls from one phone line to another.
Join Lines	Joins calls on the two telephone lines to set up a conference.
Stop recording/Resume recording	Stops recording an active call. (Availability is subject to privileges) Resumes recording. (Availability is subject to privileges)

Note: Always use the Agent Console phone controls to select phone lines or perform functions such as Mute or Hold, but not the controls on your agent telephone.

Agent Console supports two phone lines: **1** and **2**. When switching between two lines for purposes of transferring a phone interaction or setting up a multi-party phone conference, Agent Console automatically places the line you are switching from on hold.

Accept Phone Interactions

As an agent, you are ready to process new phone interactions when you change your status to Available. If you are assigned to a phone queue, you are offered the interactions waiting to be served in that queue. For an overview of an inbound call flow, refer to Inbound Phone Call Flow.

To accept an inbound phone interaction:

1. In the Control Panel, change your status to **Available**.
   Agent Console offers new phone interactions only to available agents assigned to an enabled phone queue.

2. When your agent telephone rings, answer the call.
   Your status changes to **Busy**.
   If the Local CRM uses the caller's phone number to identify an existing customer, the Display Panel pops the customer's CRM record.

   Note: Your contact centre administrator determines the event that triggers a screen pop. Based on the configuration, screen pop may occur before or after accepting or completing an interaction.

3. Process the call.

4. If required, select transaction codes before ending the call.

5. Click **End Call** in the Control Panel to initiate the post processing countdown timer. Your status changes to **Post Processing**.
   If the post processing countdown interval reaches zero, Agent Console automatically sets your status to **Available**.

6. Click **End Post Processing** to make your status **Available**, or click **Work Offline** if you need more time to complete any post processing tasks.

   Note: If your contact centre administrator has set up codes to state the purpose of an interaction or record the outcome of an interaction, you have to select appropriate codes to indicate the call outcome. For more information see Selecting Transaction Codes.

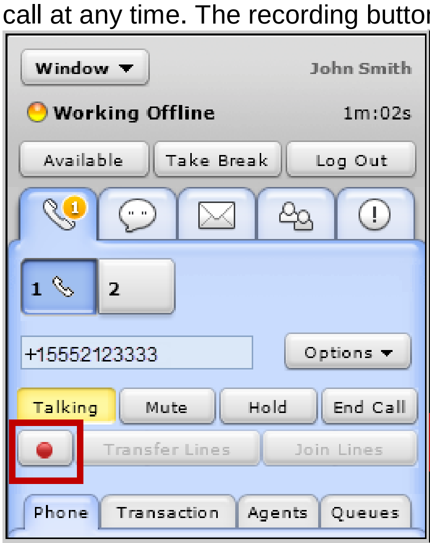
Recording Phone Interactions

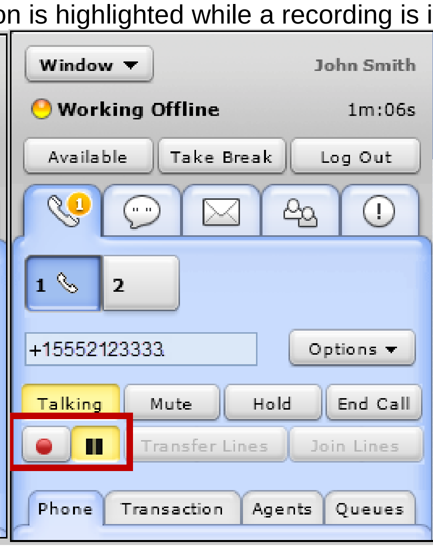
Agents can record their phone interactions with customers for different purposes, such as quality assurance. Because recording a phone interaction uses some amount of your contact centre's recording storage space, always consult your contact centre supervisor before using the recording feature. Your supervisor provides you with specific situations that require the use of the Agent Console recording feature to record a particular phone interaction.

In conformance with your supervisor's instructions, and if your contact centre has enabled you to record phone interactions, you may utilize this feature.

Depending on your call recording permission, you may see:

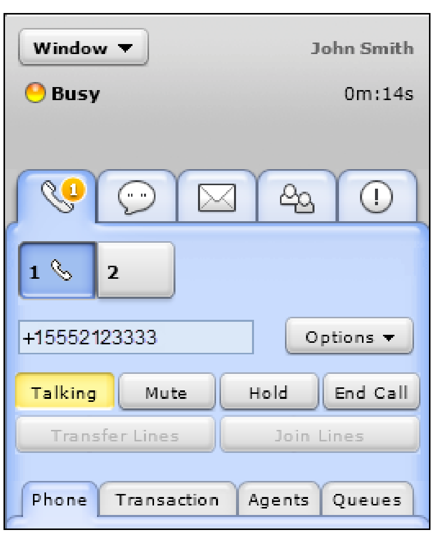
- **Start Call Recording**: If you have the permission to start call recording, when a call connects, the Control Panel shows the recording button. You can click the button to start recording the call at any time. The recording button is highlighted while a recording is in progress.





- **Start and Pause Call Recording**: When a call connects, the Control Panel shows the Recording button and a Pause button. Click the Recording button to start recording, and click Pause to pause the recording.

- **No Recording Controls**: If you do not have recording permissions, the Control Panel does not show any recording control buttons during a call.

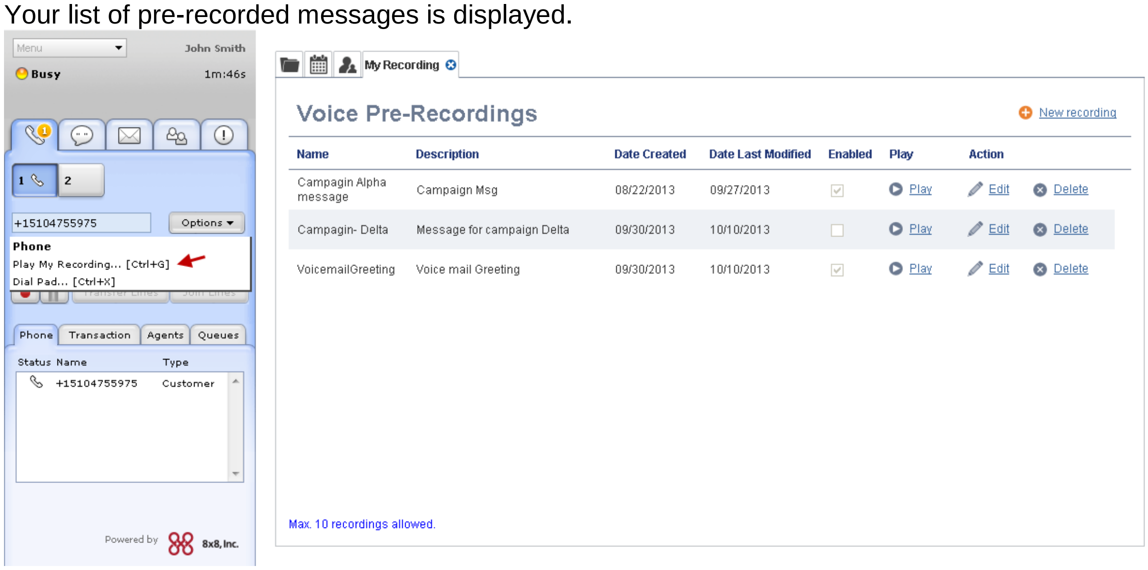


Playing Agent's Recorded Messages

Agent Console allows you to play your messages during an inbound or outbound call. When you place an outbound call and reach voicemail, you can choose to play your pre-recorded message, such as a campaign message, and hang up. The application plays the message and terminates the call. During an inbound call, you may choose to play a welcome message or greetings if you have direct agent access. See Recording Agents Messages for details.

To play a recorded message during a phone interaction:

1. In the Agent Console's Control Panel, go to Phone tab.
2. When a call connects, click **Options > Play My Recording**.
   Your list of pre-recorded messages is displayed.



3. Select the recording you wish to play and click **Play**.
   The caller hears your recorded message.

Add Notes During an Interaction

You can add notes regarding an interaction during an inbound/outbound phone call, or during a chat conversation. It enables smooth transition of an interaction from one agent to another. For example, if you have left a voicemail to a customer, you can leave a note to the next agent about the voicemail who handles the next interaction with the same customer in the future. The notes panel can be accessed via the Options menu in the Control Panel.

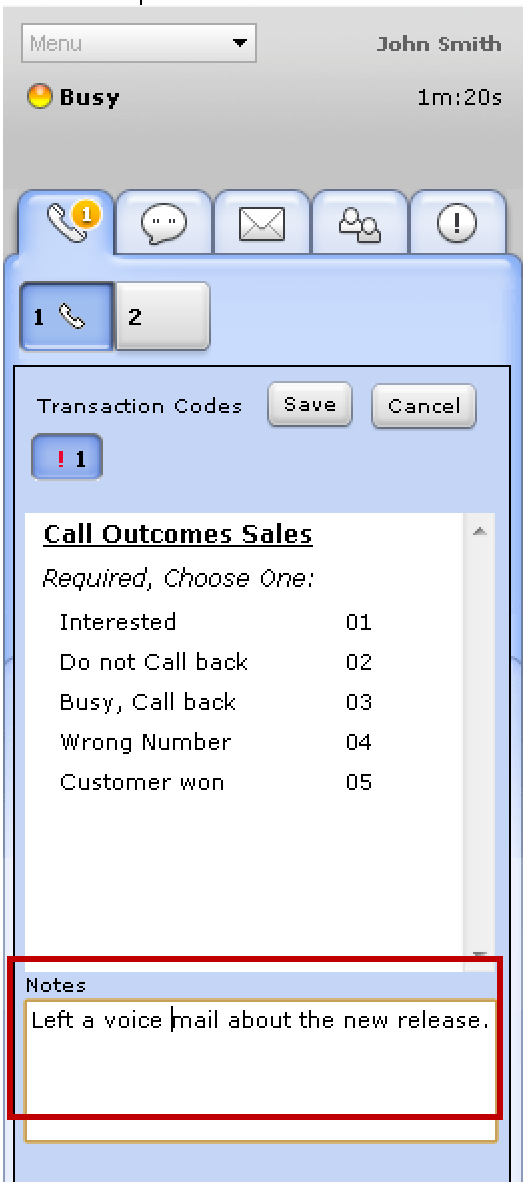
In Salesforce CRM, the notes are saved in the call log of the activity history. The agent who handles the next interaction with the same customer can refer to the call log and view the notes.

Note: This feature is applicable to the Enhanced integration of Multichannel Connect for Salesforce.

To access notes panel during a phone or chat interaction:

1. During an active call or chat interaction, click **Options** under the Phone tab.

2. Click **Transaction Codes**.
   The **Notes** panel shows below the transaction codes.



3. Enter the notes in the panel, and click **Save**.
   The saved notes appear in the Detailed Accepted Transaction Report.

Transfer Phone Interactions

An Agent can transfer a call to another agent upon customer's request or knowing that the other agent may have more knowledge answering the customer's question. A Hosted Contact Centre agent has access to two telephone lines from Agent Console Phone tab, which allows transferring the calls. Before transferring a call, you can check the status of other agents, consult an available agent, or transfer blindly without consulting.

Hosted Contact Centre allows agents to transfer an active call to another agent, a queue, or an external phone number.

Transfer Phone Interactions to Another Agent

Hosted Contact Centre allows agents to transfer an active call to another agent or queue. Before transferring a call, you can check the status of other agents, consult an available agent, or transfer the call blindly without consulting.

To transfer an active phone interaction to another agent:

1. Notify the current caller about the transfer.
2. While in an active call on line **1**, click line **2** in the **Phone** tab.
   Agent Console automatically places the phone interaction on line **1** on hold.

3. Click the **Agents** tab to see a list of agents currently logged in to Agent Console, with their current status.
   You can consult an available agent before transferring the call, or transfer blindly. You can consult the agent by phone or chat.
4. To consult the second agent before transferring the interaction:
   a. Make sure you have switched to line **2**.

b. Select an agent from the list, and click to bring up the context menu.

c. Initiate a call or a chat with the agent by choosing **Make a call** or **Start a chat**. After the agent answers the call, the button to **Transfer Lines** is enabled.

d. Inform the agent you are transferring a phone interaction to them, then click **Transfer Lines** to complete the transfer.
Agent Console submits a new phone interaction to the selected agent, then changes your status to **Post Processing**.

5. To transfer the interaction without first speaking to the second agent, select an agent, then click **Blind Transfer**.
   Agent Console sends the phone interaction to the selected agent, then changes your status to **Post Processing**.

   Note: If the second agent does not answer the phone, and the agent does not have Hosted Contact Centre voicemail, then the call is dropped after the timeout period.

6. Click **End Post Processing** to make your status Available, or click **Work Offline** if you need more time to complete any post processing tasks. For information about your contact centre's timeout interval, contact your contact centre administrator.

Transfer Phone Interactions to Another Phone Queue

Hosted Contact Centre allows agents to transfer an active call to another phone queue. Before transferring an active call to another queue, the agent handling the call should check the status of the destination queue and then transfer.

To transfer an active phone interaction to a different queue:

1. Announce to the current caller that you are going to transfer them to another department.
2. Open the **Phone** tab, then click the **Queues** tab.
   Agent Console does not place the phone interaction on line **1** on hold.

3. Choose a queue, and click **Transfer**.
   Agent Console transfers the phone interaction to the selected queue, then changes your status to **Post Processing**. The transferred call stays in the queue until answered by an available agent in the queue.

   Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Hosted Contact Centre administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.

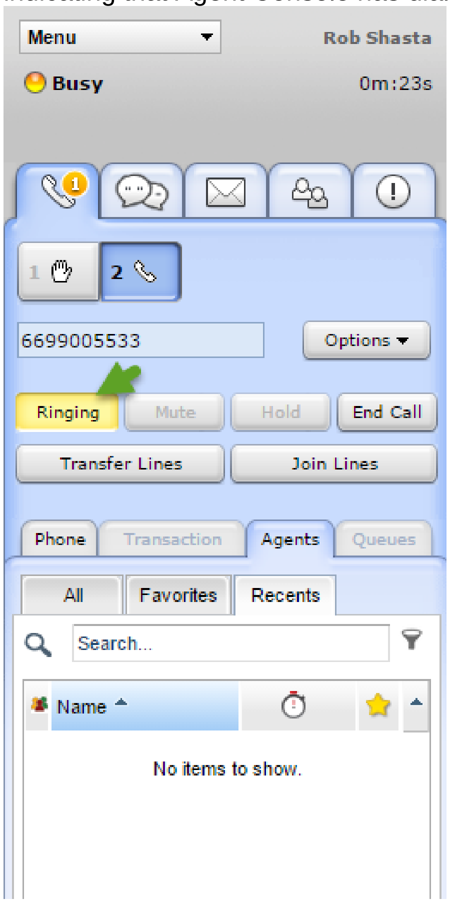
4. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post processing tasks.

Transfer Phone Interactions to an External Phone Number

Hosted Contact Centre allows agents to transfer an active phone call to an external phone number.

To transfer a phone interaction to an external number:

1. Announce to the current caller that you are going to transfer them to another telephone number.
2. While in an active call on line **1**, click line **2** in the **Phone** tab.
   Agent Console automatically places the phone interaction on line **1** on hold.
3. Type a telephone number then click **Dial**.
   - In the United States, type *1* before the area code.

- If Agent Console prompts you to choose a Transaction Code, choose a code from the list, and click **Save**.
  See Selecting Transaction Codes for more information. Ringing appears instead of Dial, indicating that Agent Console has dialed the number.
  

4. After the second party has answered the phone, tell the second party you are transferring a phone interaction to them, then click **Transfer Lines** to complete the transfer.
   Agent Console changes your status to Post Processing.
5. To transfer the call before the second party answers the phone, click **Transfer Lines**.
   Agent Console forwards the call, then changes your status to Post Processing.

   Note: If the second party does not answer the call, and the second party does not have a voice mailbox, the call eventually times out and is dropped.
6. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post-processing tasks. For information about your contact centre's timeout interval, contact your contact centre administrator.

Overview of Conference Calls

An Agent can bring another agent or an external party into a conference call. For example, an agent may want to consult the case with another agent who is an expert while the customer is present on the phone. You can create a conference at any time between an active call and another agent, or an external party by pressing Join Lines soft key.

Agent Console uses line **1** to conduct a multi-party conference, and line **2** to connect each additional participant. Each time you connect a new participant to the conference, Agent Console automatically connects the new participant to line **1**. Line **2** becomes available to connect additional conference participants.

Agent Console allows you to set up multi-party conference calls. During a conference call, you can:

- Add Agents to a Conference Call
- Add External Parties to a Conference Call

Add Agents to a Conference Call

Perform the following procedure to add another agent who is logged in to Agent Console to a conference call. The agent's status must be either Available or Working Offline.

To add an agent to a conference call:

1. Announce to the current caller that you are going to add them to a multi-party conference call.
2. Open the **Phone** tab, and click line **2**.
   Agent Console automatically places line 1 on hold.
3. Click the **Agents** tab to view a list of agents currently logged in to Agent Console, whose status is either Available (shown as Waiting in the list) or Working Offline.
4. In the list of agents, select an agent, then click **Make a call**.
   Agent Console submits a new phone interaction to the selected agent. After the phone has been answered, the sound of a human or recorded voice enables the **Join Lines** feature.
5. If you receive the agent's voicemail, click **End Call** to disconnect the call and return to line 1.
6. If the agent answers, tell the agent that you are adding them to a conference, then click **Join Lines**.
   Agent Console connects the agent and you to any conference participants already on line 1.
7. Click **End Call** to disconnect from the conference.
   Agent Console leaves the other parties connected to the conference call.

Add External Parties to a Conference Call

Perform the following procedure to add an external party to a conference call.

To add an external party to a conference call:

1. Announce to the current caller that you are going to add them to a multi-party conference call.
2. Open the **Phone** tab, and click line **2**.
   Agent Console automatically places line 1 on hold.
3. In the number text entry area, type a telephone number, and then click **Dial**.
   - In the United States, type *1* before the area code.
   - If Agent Console prompts you to choose a Transaction Code, in the list of codes, choose a code, then click **Save**. For information about choosing Transaction Codes, see Selecting Transaction Codes.

   Agent Console dials the number. After the phone has been answered, the sound of a human or recorded voice enables the **Join Lines** feature.

4. If you receive the agent's voicemail, click **End Call** to disconnect the call and return to line 1.
5. If a person answered the phone, tell them that you are adding them to a conference call, and then click **Join Lines**.
   Agent Console connects both the new participant and you to any callers already on line 1.
6. Click **End Call** to disconnect from the conference.
   Agent Console leaves the other parties connected to the conference call.

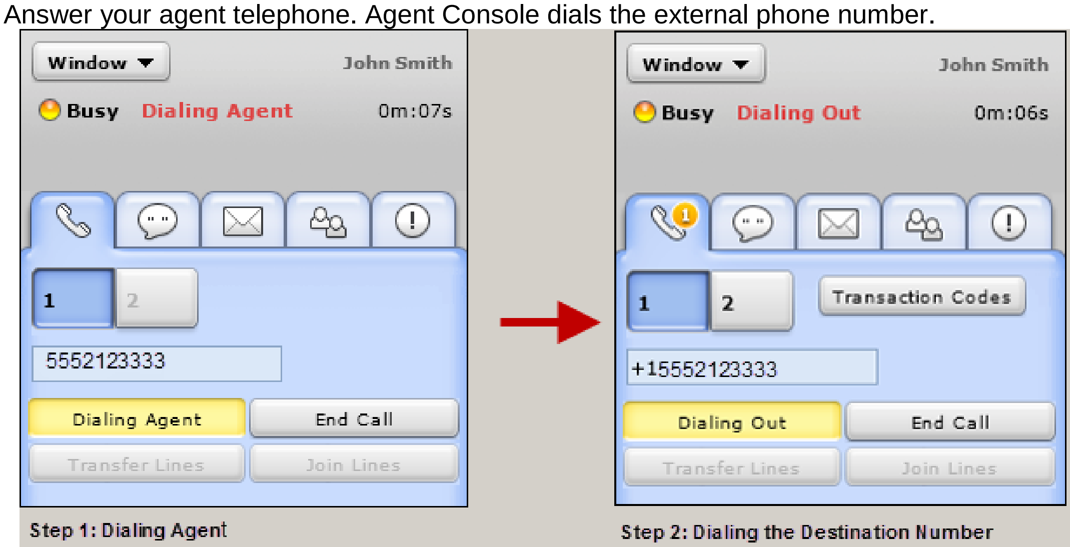
Make Outbound Phone Calls

Agent Console allows you to make outbound phone calls to:

- Agents
- External phone numbers

Agent Console uses a two-step process to dial an outbound call:

1. Enter or click a number to call. Agent Console dials your agent telephone number first.
2. Answer your agent telephone. Agent Console dials the external phone number.



Contact your supervisor for your contact centre's policies for using Agent Console to place outbound calls.

Call Agents

You can call another agent by entering their full phone number in the Phone tab, or by selecting the menu option in the Agent Status tab.

Note: You need to be part of the same functional group to be able to see and call another agent. However, supervisors can see and call the agents of other groups.

Note: Agent-to-agent dialing requires the right settings in Dial Plans.

To call another agent using the Phone tab

1. Open the **Phone** tab.
2. Enter the agent's full telephone number in the entry box.

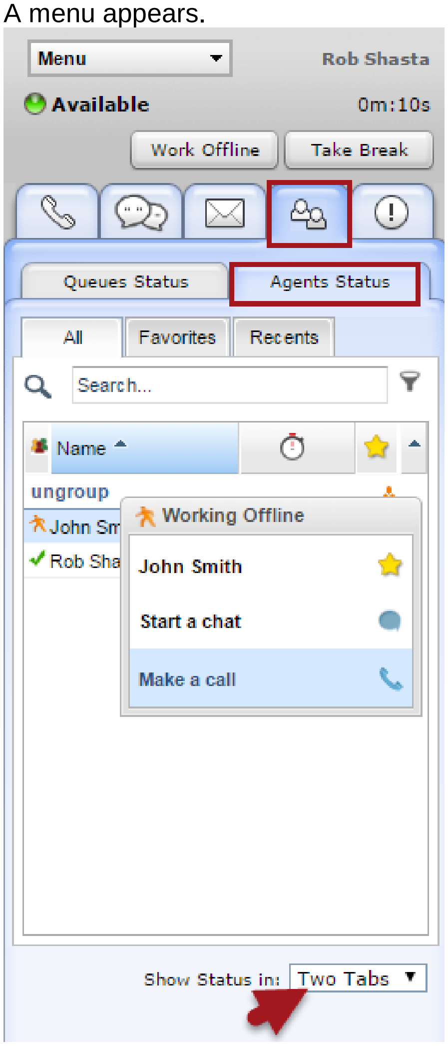
3. Click **Dial**.
   The call is established.
   See Transfer Phone Interactions to Another Agent if you like to transfer the call.

To call another agent using the Agent Status tab

1. In the Control Panel, go to the **Status > Agent Status** tab from the Two Tabs view.

   Note: The view in the Status tab changes depending on whether you choose to view in **One Tab** or **Two Tabs**.

2. Find the agent in the list, and left-click.
   A menu appears.



   Note: The list of agents can also be accessed from Phone and Chat tabs. Go to **Phone > Agents** or **Chat > Agents** to see them.

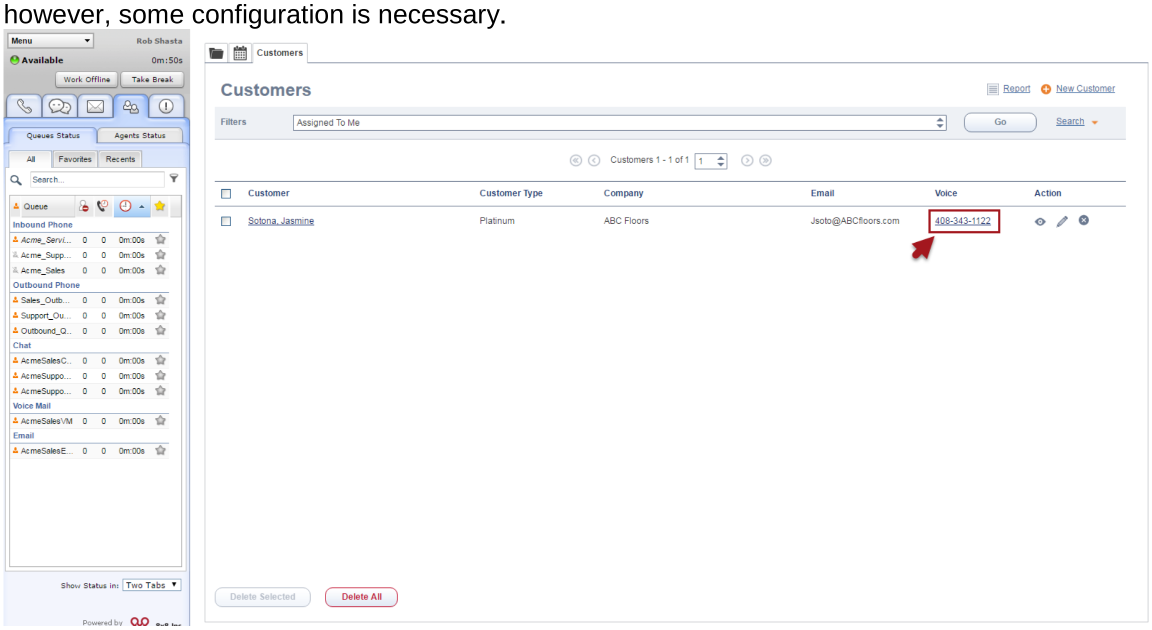
3. Select **Make a call** from the menu options.
   A call is established to that agent.
   See Transfer Phone Interactions to Another Agent if you like to transfer the call.

Call External Phone Numbers

You can place outbound to an external phone number using one of the following ways:

- **Control Panel**: Ability to dial outbound calls from the Agent Console Control Panel by simply entering the phone number under the Phone tab and clicking **Dial**.
  Agent Console dials your agent telephone number first. Answer your agent telephone, and Agent Console dials the external phone number.

- **Click-to-Dial**: Ability to click and dial phone numbers from local or external CRM records. The Click-to-dial option is available out-of-the-box in local CRM. For external CRMs, however, some configuration is necessary.



- **Web Callback**: A system-generated outbound call placed in response to a customer request. If a callback is scheduled to a campaign customer, a reminder pops up at the scheduled time to the same agent who scheduled the callback. The agent then has to manually place a call.

Dial Digit Tones

During a phone call, agents may encounter problems communicating digit tones to an IVR system using the telephone key pad. For example, during an outbound call, an agent inputs an account number in response to an IVR system prompt; the account number may be conveyed incorrectly due to digit audio leakage during transmission among diverse networks. Keyboard dialing provides an alternative mechanism to counteract this issue. It offers an alternate long tone method through a Hosted Contact Centre Dial Pad interface to convey digit tones from Agent Console to a touch tone IVR system across diverse networks, limiting the possibility of digit audio leakage.

Keyboard dialing allows an agent to generate two types of digit (DTMF) tones: Short Tone, and Long Tone. When the default short tone fails, an agent may select long tone using the Dial Pad interface to communicate the information correctly to the destination IVR system.

Features

Keyboard Dialing features the following behavior:

- Available during any active phone call session.
- Supports two types of digit tones: short tone, and long tone.

- Preserves the digit tone setting per agent, per browser, and per workstation. If an agent logs out and logs back in to the same workstation, previous digit tone settings are maintained until the next manual change.
- Shares between two busy lines in a two-line call. The dial pad stays open when agent switches between two busy phone lines.
- Generates digit tones for the active line only, in the event of an agent handling two busy lines.
- Allows navigating voicemail IVR to access voicemail.

Limitations

Keyboard dialing has the following limitations:

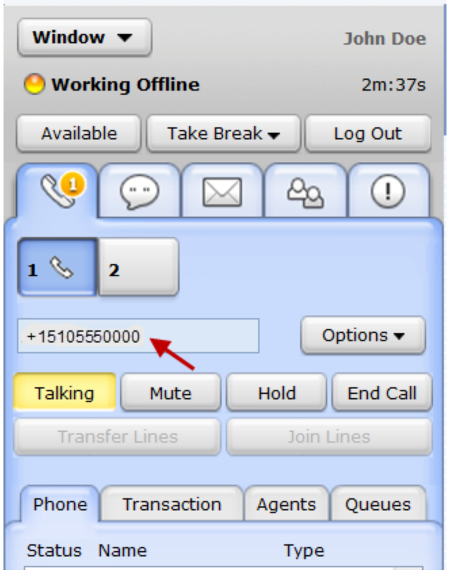
- Not readily available when call is muted.
- Not supported for Hosted Contact Centre CTI Connect for Salesforce.
- Not supported for recording personal greetings during verification calls.

Access Dial Pad

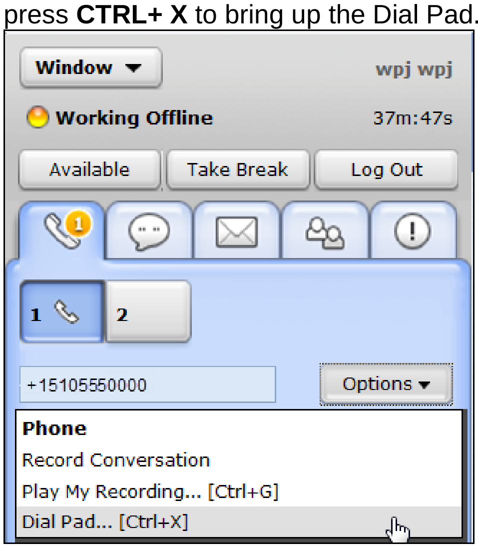
During an active call session, you can use the keyboard or the Dial Pad for digit tone dialing. The Dial Pad enables you to change digit tone duration. When an agent accepts a phone call, the Options menu gets activated in the Control Panel. The Options drop-down menu includes the Dial Pad feature.

To dial digit tones using keyboard:

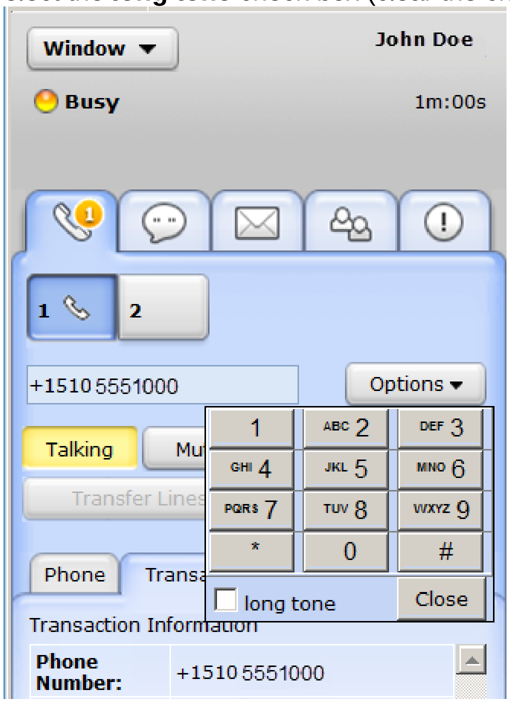
1. Place the cursor focus in the phone text box.



2. Enter the numbers on the keyboard. You may hear the short tone transmission.
3. To change the digit tone duration, click **Options**, and select Dial Pad from the drop-down menu.
   OR
   press **CTRL+ X** to bring up the Dial Pad.



4. Select the **long tone** check box (clear the check box to switch back to short tone).



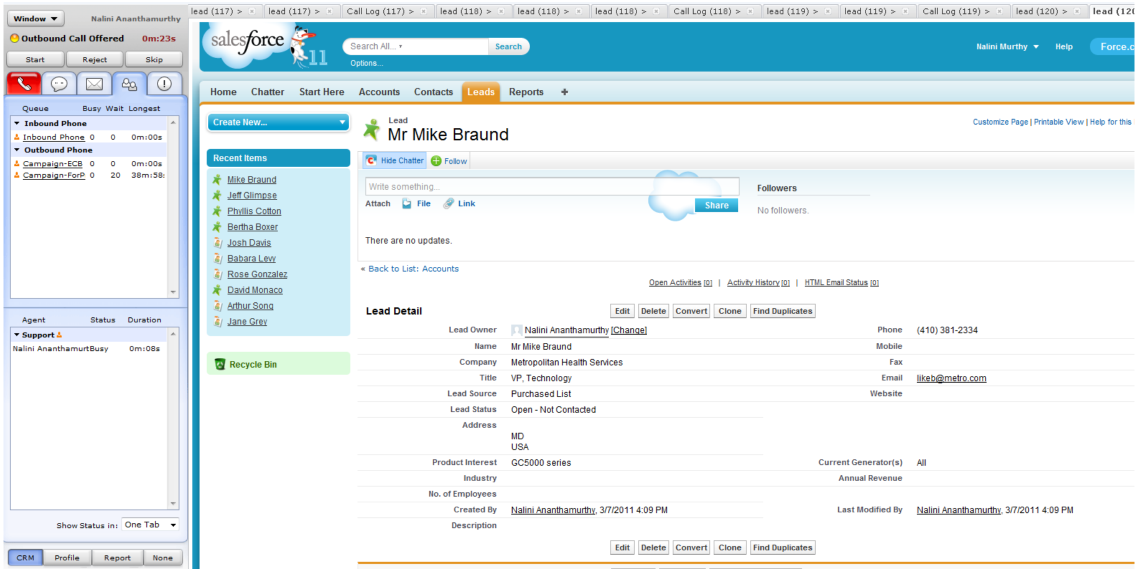
5. Input the digits or characters using the keyboard or the Dial Pad.

Process Outbound Campaign Calls

The Hosted Contact Centre Dialer is an automated outbound phone-based dialer that searches and retrieves a target call list from campaigns defined by the administrator. Campaigns are assigned to outbound phone queues, while agents are assigned to these queues. As an agent, when you change your status to Available, a campaign call is offered to you if you are a member of the queue a campaign is assigned to. The Control Panel on your Agent Console indicates an outbound call, and the Display Panel presents the contact record details for your preview. You can preview the contact record, and decide to start, reject, or skip the call.

To process a campaign call:

1. Change your status to **Available** in the Control Panel.
   A campaign call is offered.



The Phone tab blinks red. The Display Panel presents the complete contact record for preview, while the Control Panel indicates an outbound call.

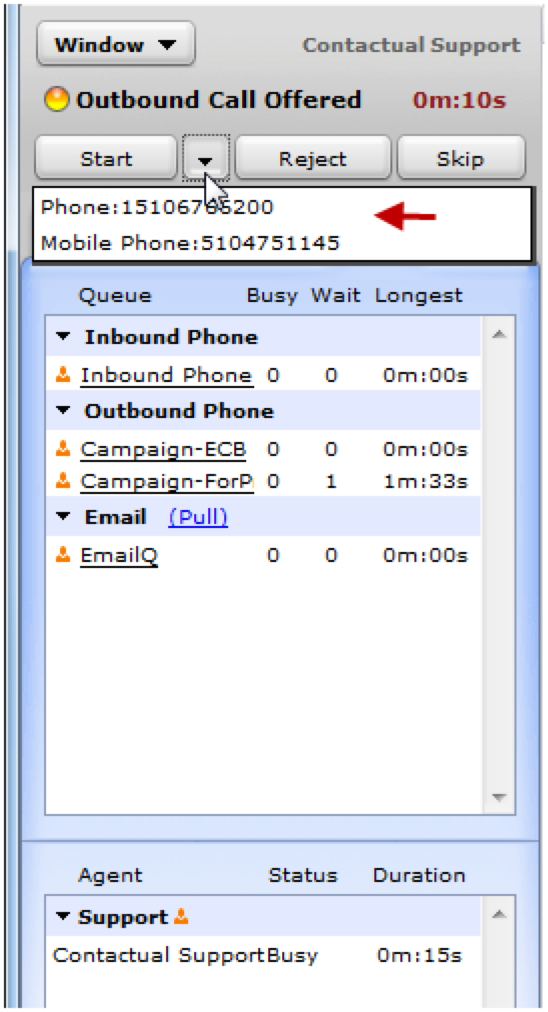
2. After a quick preview of the contact record, you can decide to initiate, reject, or skip the call.

   Note: If you do not accept the call within the timeout period, your status changes to On Break automatically.

   - To initiate the call, click **Start**. Your phone rings.

     a. Answer your phone. The destination number dials automatically if a default phone is selected.

     b. In the absence of a default phone number, select a destination number to dial from the drop-down list of numbers.



c. Click **Options** to see processing options, such as playing a pre-recorded message, recording the conversation, or selecting a transaction code.

d. Select a desired option, and complete the call.

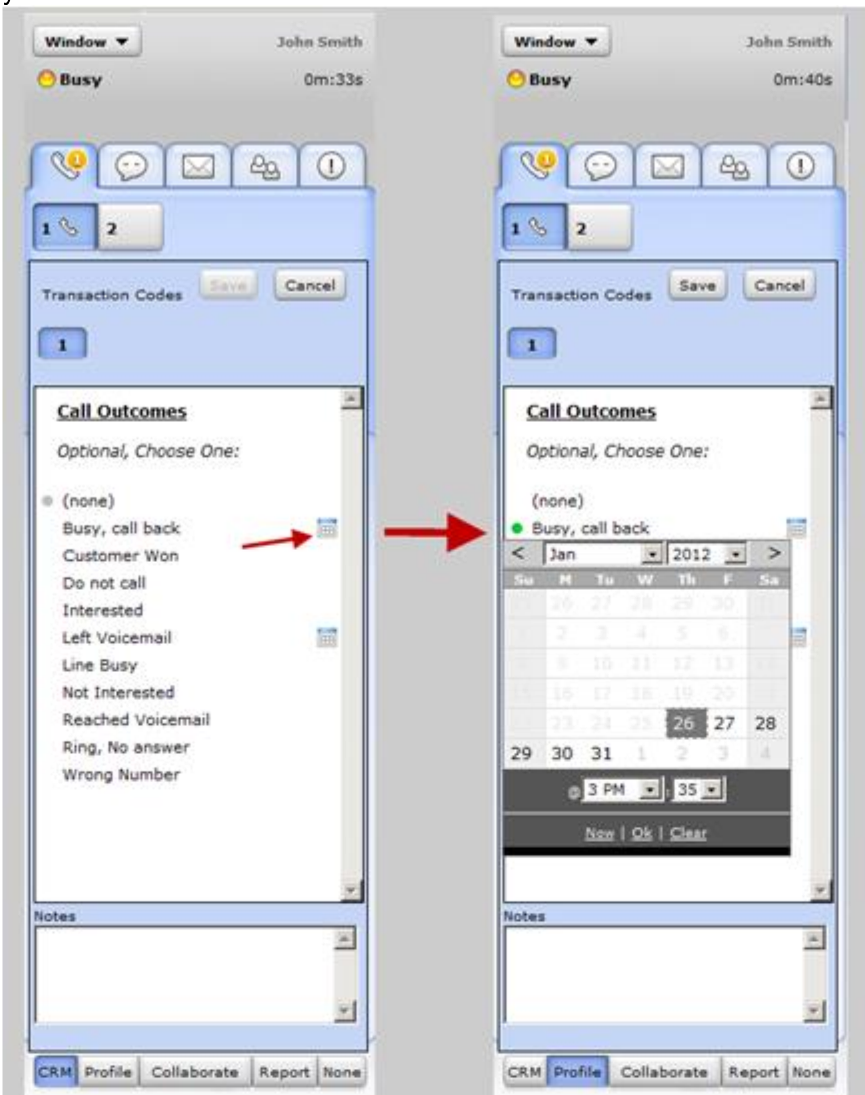
- To reject the call, click **Reject**. Your status automatically changes to **Work Offline**. The call is routed back to the queue for the next available agent.
- To skip the call, click **Skip**. The call skips, and the next call in the queue is offered. The skipped record is marked as completed.

Reschedule Campaign Calls

If a campaign call fails to reach the called party, you can set up retrial calls or schedule a callback automatically by selecting appropriate transaction codes that map to the following disposition actions:

- **Try Again**: sets up retrial attempts for a call as specified by the administrator. The retrial call is placed back in the queue and offered to any available agent within the specified time interval. For example, if you fail to reach the called party during a campaign call, you can select a transaction code such as Ring, No answer, or Reached third party, which maps to the Try Again disposition action, triggering retrial attempts for the call.

- **Schedule Call back**: allows scheduling a callback to a campaign customer, and pops up a reminder at the scheduled time to the same agent. The agent must manually place a call. For example, on reaching a destination number, if a customer suggests a time to call back, you can select a code to schedule a callback based on the customer’s convenience.



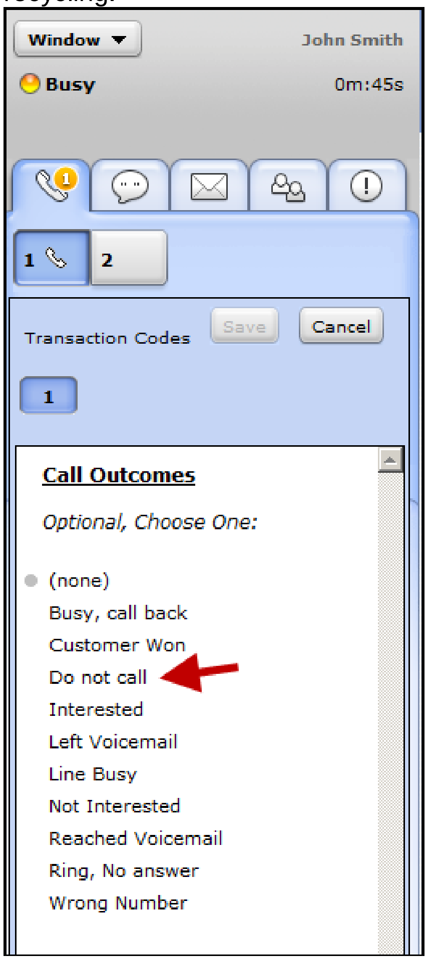
If you select a transaction code that triggers Schedule Call back, you are prompted to schedule a time for the callback using the calendar. Specify a date and time to call back, and a task is automatically created for the call. A reminder pops up a few minutes before the specified scheduled call with the call log. Click the call log to view the details of the scheduled call. The agent has to manually place the call to complete the task, and dismiss the task in the Reminder window.

Do Not Call Disposition

On reaching a contact during a campaign call, if the contact asks not be called back again, you can select an appropriate transaction code to indicate the contact's choice. You can automatically save this information in the contact record if:

- the code is mapped to the Do not call disposition action.
- the campaign defines a field to capture the transaction code.

The Do not call disposition information is critical to filter the record from the campaign call list for recycling.



Manage Your Status During Outbound Calls

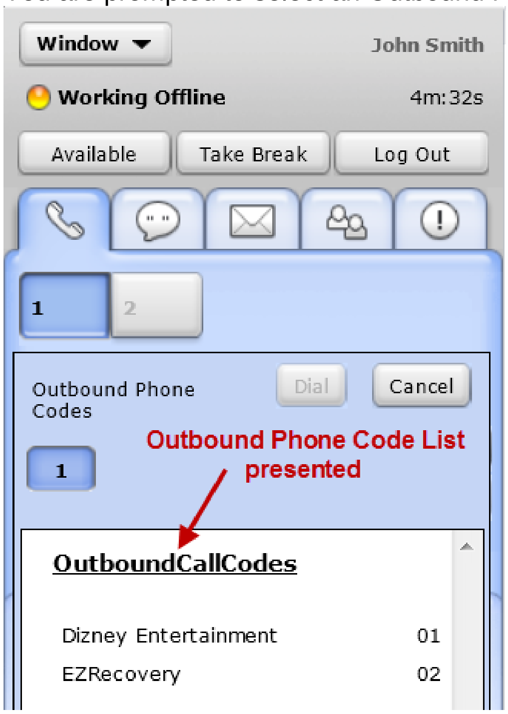
During outbound calls, your status changes to Busy, or preserves your current status. You can route the call through a queue by selecting an outbound phone code, provided that your contact centre administrator has set it up. Your status changes to Busy. If you do not route the call through an outbound queue, your current status is preserved. For example, if your status is Available while making an outbound call, and you do not route the call through a queue, Agent Console leaves your status as Available, offering new incoming phone interactions.

Change Your Status to Busy

Changing your status to Busy during an outbound call requires you to route the call through a queue. This is enabled through outbound phone codes, where each code is associated with an outbound queue. You must be a member of the outbound phone queue, as well as be assigned to the code list.

To change your status to busy during an outbound call:

1. In the Phone tab, enter a phone number, and click **Dial**.
   You are prompted to select an Outbound Phone Code.



2. Select a code from the list, and click **Dial**.
   The call dials out and routes through the specified queue, changing your status to Busy. It dials your phone first and then the destination number.

Retain Your Current Status

If you do not route an outbound call through a queue, your current status is retained and you are offered new incoming interactions if you are Available. This is not desirable when you are on another call. To work around the situation, you can follow the steps below:

If you are on an outbound call, and Agent Console offers you a new interaction, you have two options:

- Click **Accept Call** to have Agent Console place the existing call on hold. Place the incoming phone interaction on line **2**, connect your agent telephone to line **2**, and change your status to Busy.

- Click **Reject Call** to have Agent Console return the new interaction to the phone queue and change your status to Working Offline.

If you neither accept nor reject the new interaction, and the interaction acceptance interval reaches zero, Agent Console returns the new interaction to the phone queue, and changes your status to Working Offline.

PROCESS VOICEMAIL INTERACTIONS

For agents assigned to voicemail queues, Agent Console Phone tab enables you to process voicemail interactions as a subset of phone interactions.

Unlike phone interactions, voicemail interactions cannot be transferred or forwarded. The information in this section describes the default voicemail options.

For information about Agent Console phone tools, see Overview of Phone Controls.

Accept Voicemail Interactions

Perform the following actions to accept a new a voicemail interaction. The following procedure assumes that you are assigned to an enabled voicemail queue, and that your status is Available.

To accept a voicemail interaction:

1. In the Control Panel, click **Available**.
   Agent Console offers a voicemail interaction only to an agent assigned to an enabled voicemail queue, and whose agent status is Available.

2. When your agent telephone rings. Agent Console flashes the Phone tab and displays Voicemail Offered. Answer your agent phone to accept the interaction.
   Then, Agent Console:

   - Plays a recorded message that notifies you the new interaction is a voicemail interaction.

   - Tells you to press **1** to send a copy of the voicemail message to your email address as a WAV file attachment.

     Note: The only way you can save a voicemail message is to send a copy of the message to your email address. When you disconnect your agent telephone from the voicemail interaction, Agent Console permanently deletes the voicemail message.

   - Begins playing the voicemail message.
     Agent Console repeats the voicemail message until you hang up the phone or press **End Call**.

3. After listening to the voicemail message, hang up your agent telephone, or in the Phone tab of the Control Panel, click **End Call**.
   Agent Console permanently deletes the voicemail message. If you did not press **1** to send a copy of the voicemail message to your email address, the message is permanently lost.

4. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post processing tasks.

PROCESS CHAT INTERACTIONS

Agent Console chat controls allow you to:

- Process chat interactions.
- Handle multiple chats.
- Handle multilingual chats.
- Transfer customer chats to a different queue.
- Insert FAQ responses into chat interactions.

Overview of Chat Interactions

In Agent Console, chat interactions provide a means of responding in real time to customer inquiries.

Depending on the configuration of your contact centre, the contact centre's chat access page can be configured to either allow or require a customer to supply an account number, case ID, or other numerical information before beginning the chat interaction. When you accept the new chat session, Agent Console uses the information to automatically access customer or case records in the Local CRM.

If the customer has not supplied any identifying information before beginning the chat, you can ask the customer via chat window the information you need to create a new customer or case record.

Note: As an agent you can process up to six concurrent chats from customers, and an unlimited number of chats with agents.

Co-Browsing Support for Chat

Hosted Contact Centre offers co-browsing for chat. Agents and customers can request or allow co-browsing sessions via chat. See Co-Browse Via Chat to learn how to start a co-browsing session.

Multilingual Support for Chat

Hosted Contact Centre offers multilingual support for chat. With this feature, customers can choose to chat in any of the supported languages. Agents can handle customer chats in any of the languages supported, or use an automatic translation tool. Each Hosted Contact Centre agent is associated with one primary and one or more secondary languages of fluency.

- If the chat request is in one of these languages, agents can chat in the requested language.
- If the chat request is not in their primary or secondary language, agents can use the provided automatic translation tool.

With multilingual support for chat:

- Administrators can provide language choice in embedded chat.
- Customers can choose to chat in a language of their choice.

- Agents can handle customer chats in any of the supported languages.

Supported languages

Hosted Contact Centre offers chat translation support for English, Russian, German, Japanese, Spanish, French, Chinese, Portuguese, Italian, or Polish.

To learn how to handle multilingual chat requests, refer to Handle Multilingual Chats.

Inbound Chat Work Flow

Chat interactions flowing into Hosted Contact Centre stay in a chat queue until an agent is available. When an agent's status is Available, the longest waiting chat in the queue is offered to the agent. Hosted Contact Centre searches the Local CRM database for existing customer records based on account number, case number, or any arbitrary data passed during the interaction. If the chat request is from an existing customer, the relevant customer or case record is presented to the agent through screen pop. In the absence of a matching record, a new customer record entry pops up. Screen pop occurs either before or after agent accepts an interaction, based on the screen pop settings configured by contact centre administrator. The agent processes the chat, and may select transaction codes to indicate chat disposition. Selecting transaction codes may be optional or mandatory based on the settings. On ending the chat, the agent gets post-processing time for a final wrap-up before the chat terminates. If codes are mandatory, the interaction stays in Post Processing mode until codes are selected.

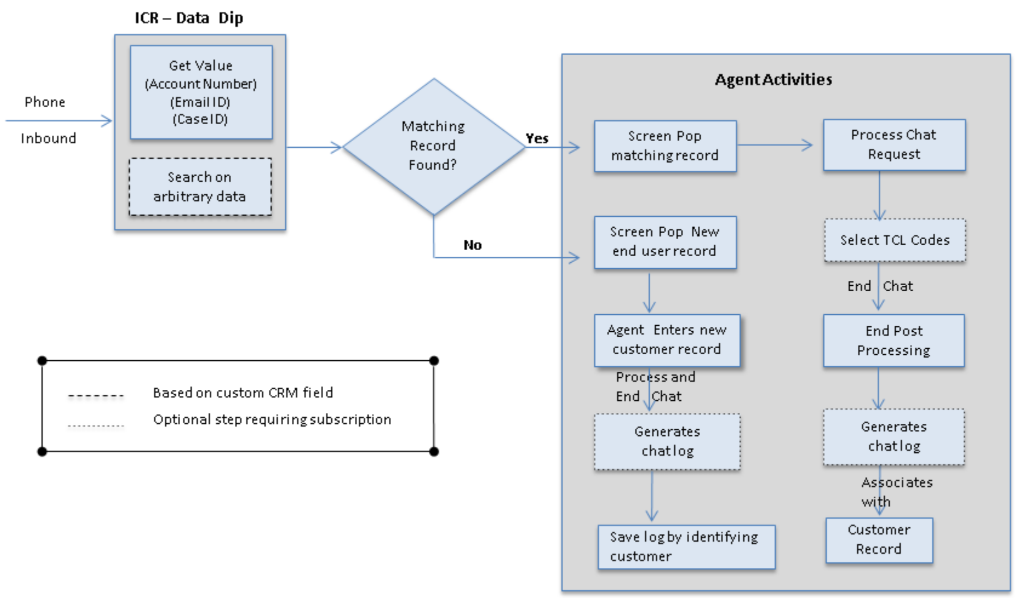
At the termination of the chat, Hosted Contact Centre may create an auto call log. If the administrator has configured auto logs, one of the following auto log events occurs:

- Screen pop auto log in view mode
- Screen pop auto log in edit mode
- No screen pop

Note: Auto log of interactions requires administrator configuration.

The sequence of events in an inbound chat flow may be represented by the following chat flow diagram:

Inbound Chat Work Flow



Overview of Multi-Chat

Your contact centre administrator can configure each agent to handle up to six chats with customers, and an unlimited number of chats with other agents of the same tenant. These settings determine your multi-chat capability.

Features

- Manages concurrent chats with multiple customers and agents.
- The chat list of customers and agents provides easy access to chats in progress.
- The chat list is sorted primarily based on waiting time. The longest-waiting chat is placed on top of the list.
- Icons differentiate agent-to-customer chat from agent-to-agent chats.
- Icons highlight unread chat messages.
- Icons indicate customers waiting for an agent's response.
- Icons send alerts if customers are waiting longer than the SLA.
- A pop-out chat window improves handling of multiple chats.
- Relevant customer records pop up when accepting chats.
- Customer information such as name, email, and transaction ID display on the title bar of the popped-out chat window.
- Is able to sort the chat list by Identification: nickname, first name, last name, email, and transaction ID. By default, the chat list is sorted by waiting time.
- Tracks messages from new customers via Transaction ID.
- Searches chat list by name.

Process Chat Interactions

Hosted Contact Centre directs chat requests to agents via a chat queue. Agents must be in Available state to receive these incoming requests. When an incoming chat is offered to an agent, the Chat tab blinks, indicating an incoming request. The agent can accept or reject the chat request. On accepting, the agent's status changes to Busy. On rejecting the request, the agent's status changes to On Break.

Pre-requisites

To receive chat interactions, agents must:

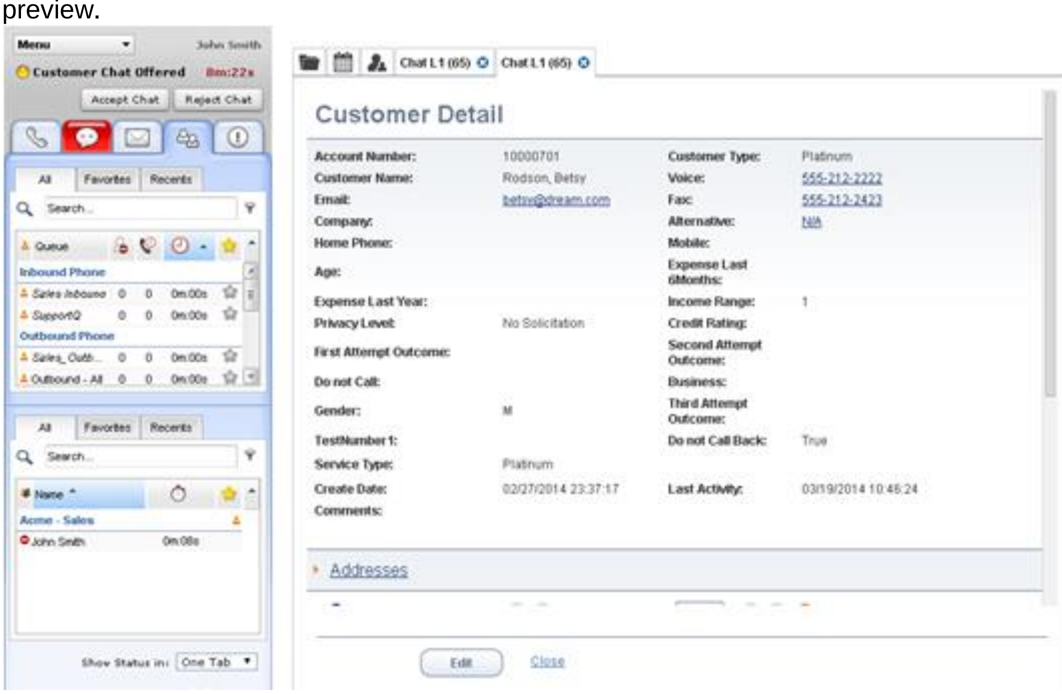
- be in Available state.
- be assigned to an enabled chat queue.

  Note: You can view or edit your queue assignments in the Agent Profile. For details, refer to Viewing Agent Assigned Queues.

To process a new chat interaction:

1. Change your status to **Available**.
2. The Chat tab in the Control Panel blinks red indicating an incoming chat request.

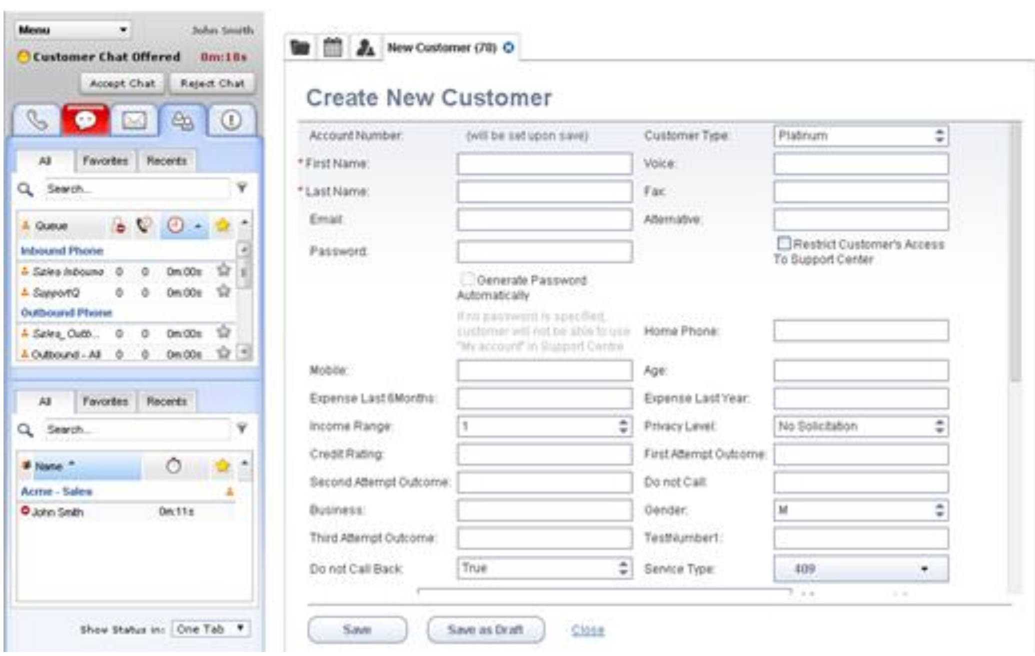
3. If the incoming chat is from an existing customer, the customer or case record pops for preview.



Note: If the customer supplied account or case information when initiating the chat, Agent Console accesses the appropriate record and presents the record for preview. The screen pop behavior may vary based on the settings.

If the request is from a new customer:

a. If the request is from a new customer, a new customer record entry form pops up.



b. Enter the details of the new customer, and save the customer record.

c. After processing the chat, click **End Chat**.

d. If chat log is enabled, a chat log is created and pops in edit mode.

e. **Save** the log by selecting the newly-created customer from the list.

The log is saved as a case.

4. Preview the record details, and click **Accept Chat**.

   Note: If you reject the chat, or failed to accept it before the acceptance interval lapses, your status is changed to On Break.

5. Initiate the chat conversation with the customer by typing in the chat window.

   Note: The chat window capacity is 5000 characters to allow agents to communicate large bodies of text, such as FAQs, via the chat window. Chat interactions via Support Centre are limited to 500 characters on the customer side.

6. Click **Send**.
   Your chat entry is posted on the customer's chat window. You are also notified of typing in progress on either end.

7. Optionally, insert information from FAQs. For details, refer to Insert FAQ Responses into Chat Interactions.

8. Optionally, select transaction codes to indicate chat disposition.

9. To end the conversation, click **End Chat**.
   The chat conversation ends. Your status changes to Post Processing to wrap up.

10. You can end post processing manually, or wait until the post processing timeout occurs.

11. At the termination of the chat, a chat log may pop up. The chat log opens in view mode or edit mode based on the settings. Auto log occurs only if the administrator has configured it.

    Notes:
    - A chat log opens in view mode if the chat request is from an existing customer. The log case is associated with that customer record automatically.
    - A chat log opens in edit mode if the chat request is from a new customer. While saving the log, you are prompted to select a customer from the existing list.

12. Edit the chat log case as desired, and save or save as a draft.

Enhanced Control on Agent Status

We have offered agents the flexibility to stop new chat interactions and wrap up the chat sessions in progress while handling multi-chat. With this enhancement, agents winding up for the day can block new chat interactions being offered to them and manage the workload better. In the Control Panel, agents are offered Stop New and Resume buttons.

- Clicking **Stop New** blocks incoming chat requests.
- Clicking **Resume** allows incoming chat requests.

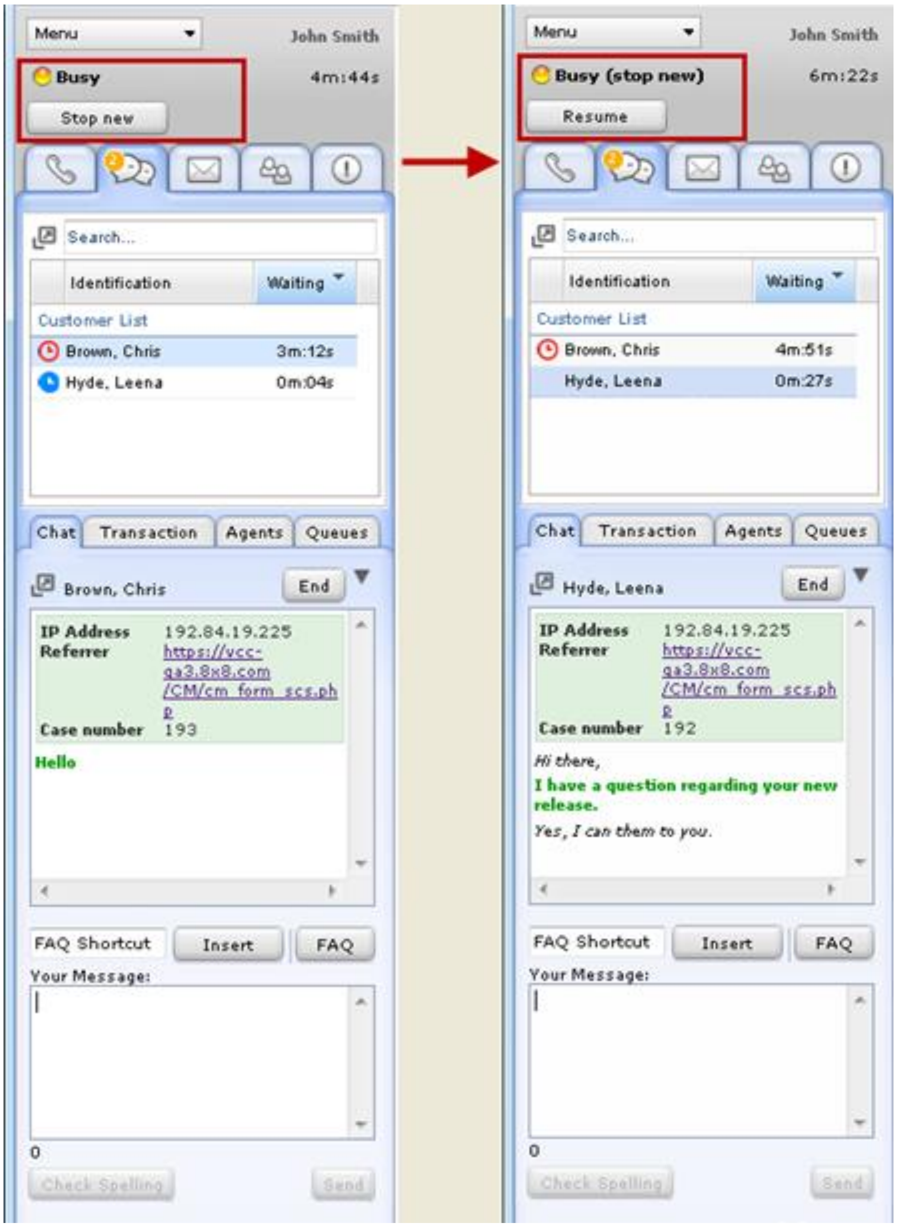
Features

- Stop New is limited to queued chat interactions only.
- The Stop New button is only available in busy state during multi-chat.

- Monitoring shows when agent status changes to Busy (stop new).

To stop new interactions:

1. While you are processing chat interactions, your status automatically changes to Busy.
2. Click **Stop New** from the Agent Console's Control Panel.
   Your status changes to Busy (stop new). While in this state, you are not offered any new chats.



3. Wrap up the existing chat sessions.
   On wrapping up the last chat session, your status changes to Post Processing, and then to Work Offline, instead of being offered a new chat.

To resume new interactions:

1. While in Busy (stop new) status, new chat requests are blocked.
   If you wish to resume, click **Resume** from the Agent Console's Control Panel.
2. Any queued chat request is offered to you immediately.
   Begin processing chat interactions.

Handle Multiple Chats

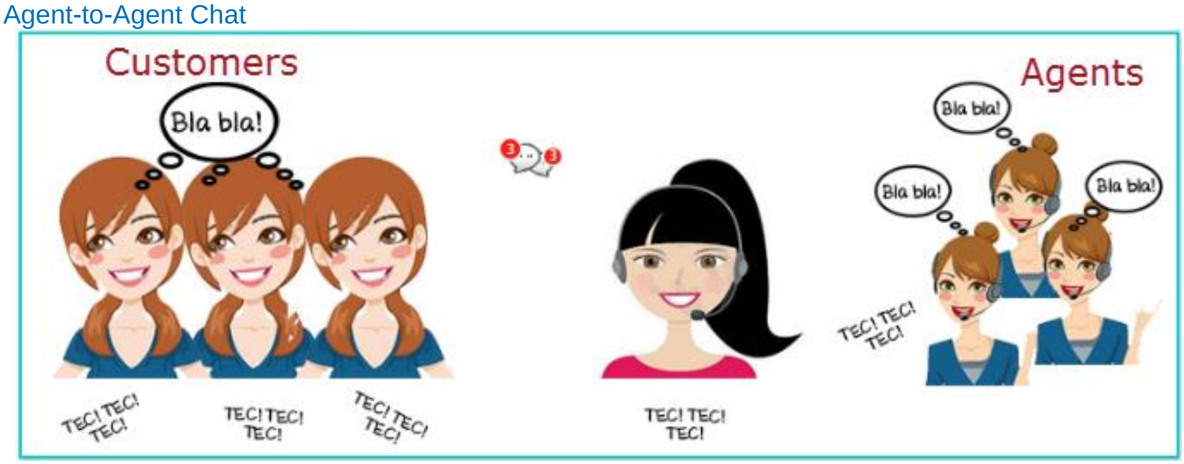
You can handle multiple concurrent chats with customers and agents. Your status must be Available to accept the first chat. After accepting the first chat, your status changes to Busy. Based on the number of interactions allowed, chat requests continue to be offered to the agent until they reach the maximum allowed customer chats. When a new chat request is offered, the chat tab indicates an incoming request by blinking if the Chat tab is not in focus.

At the same time, the customer receives a message to wait until an agent becomes available. You can accept or reject the chat at this time. On accepting a chat, the system looks to see if the chat is with an existing customer. If a matching CRM record is found, the customer detail record is presented to the agent in a separate tab. In the absence of a matching record, a new customer record opens.

The agent can now chat with the customer and be open for handling more chat requests.

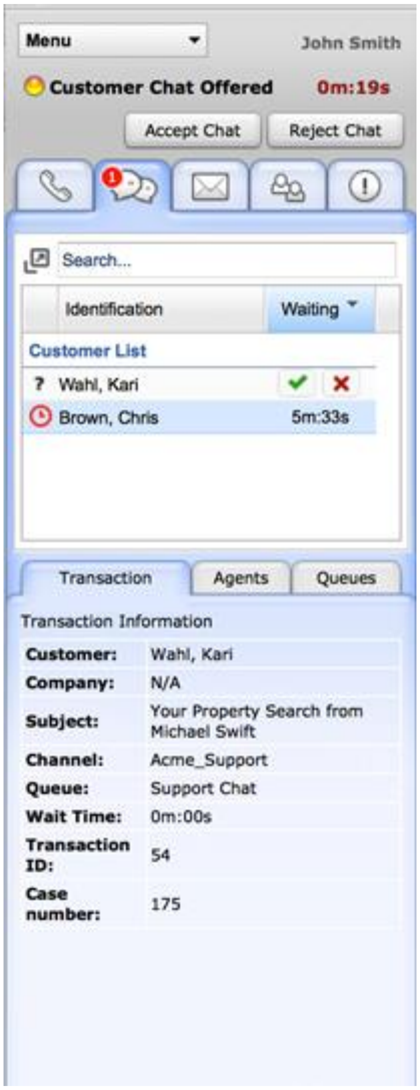
Multiple chats can be:

- Customer-to-Agent Chat
- Agent-to-Agent Chat



Chat List

To keep track of multiple chats in progress, a chat list is maintained for customer chats and agent chats. When a new chat is offered to an agent, the chat list is updated to show this new entry at the top of the appropriate group. A question mark appears in the new message column next to the customer name. Icons to accept ( ) and reject ( ) offered chats appear in the same row.



The chat session starts as soon as you accept the chat. A customer chat is displayed in the Customer List while an agent chat is displayed in the Agent List. If the agent selects a chat, the chat information is shown in the chat panel with the Transaction tab selected. If the agent accepts the chat, the chat continues as expected.

Customer-to-Agent Chat

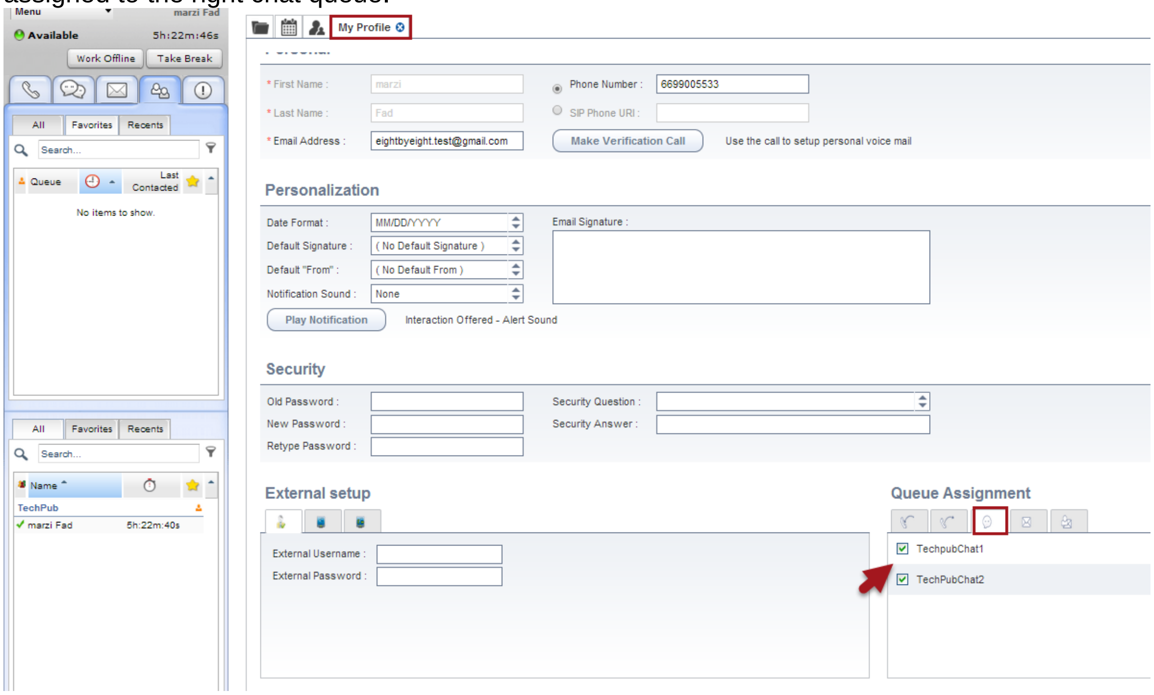
As an agent you can chat with up to six customers. You need to be part of a queue to receive chats coming to that queue. When a customer chat arrives in the queue, it is offered to the available agent who has been waiting for the longest time.

Before you start:

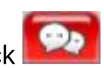
First, you need to check if you are part of a chat queue to receive their chats:

1. Log in to Agent Console.
2. Click the **Available** state.

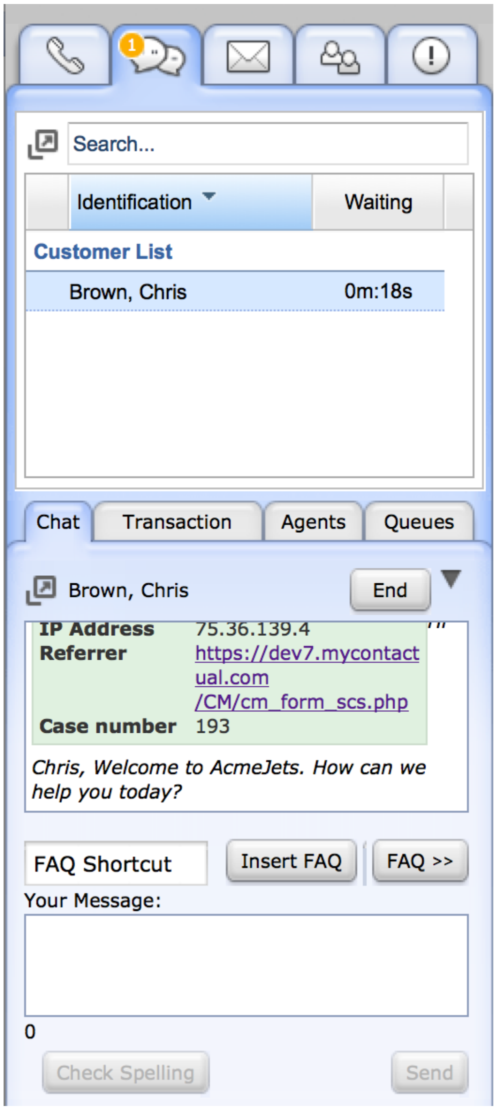
3. Click **Profile** in the main menu.
4. In My Profile page, go to **Queue Assignment** and open the **Chat** tab. Check if you are assigned to the right chat queue.

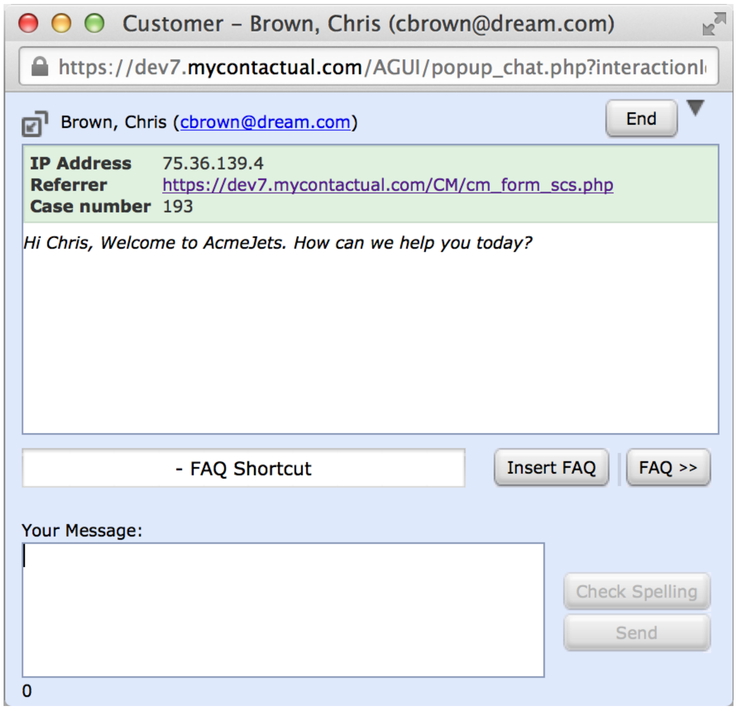


To process a customer chat:

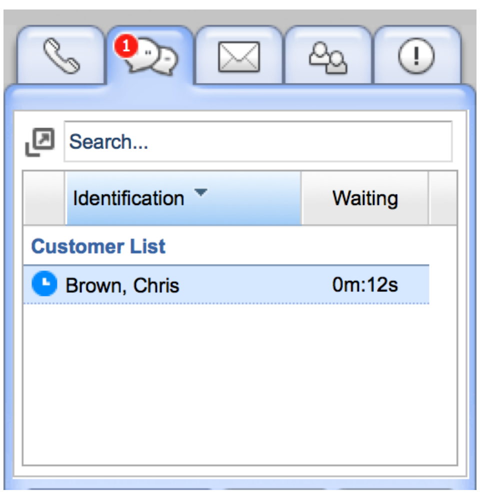
1. In Agent Console, when a new chat is offered, click  to go to the chat window.
2. Click  to accept the chat. The tab changes to , indicating the number of active chats waiting.
3. If it is an existing customer, the chat list gets updated with the customer information.
4. The customer's detailed record also opens in a new tab.
5. Type your message in the chat window and click **Send**.

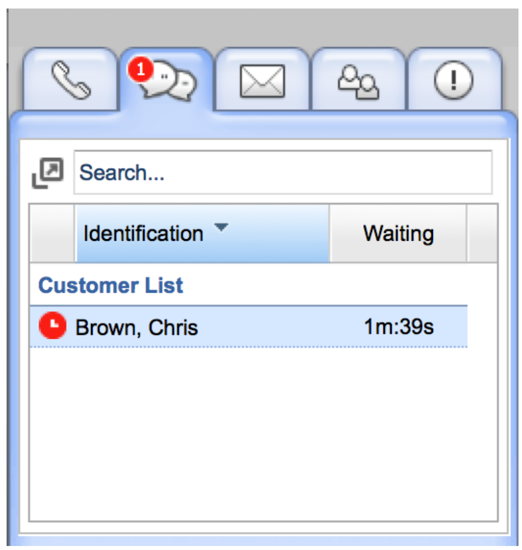
Note: Click  to open a chat window. The title bar in the pop-out chat window shows the customer nickname, last name, first name, and email ID. If it is a new customer, it shows the Transaction ID.


Search...
Identification
Waiting
Customer List
Brown, Chris
0m:18s
Chat
Transaction
Agents
Queues
Brown, Chris
End
IP Address
75.36.139.4
Referrer
https://dev7.mycontactual.com/CM/cm_form_scs.php
Case number
193
Chris, Welcome to AcmeJets. How can we help you today?
FAQ Shortcut
Insert FAQ
FAQ >>
Your Message:
0
Check Spelling
Send

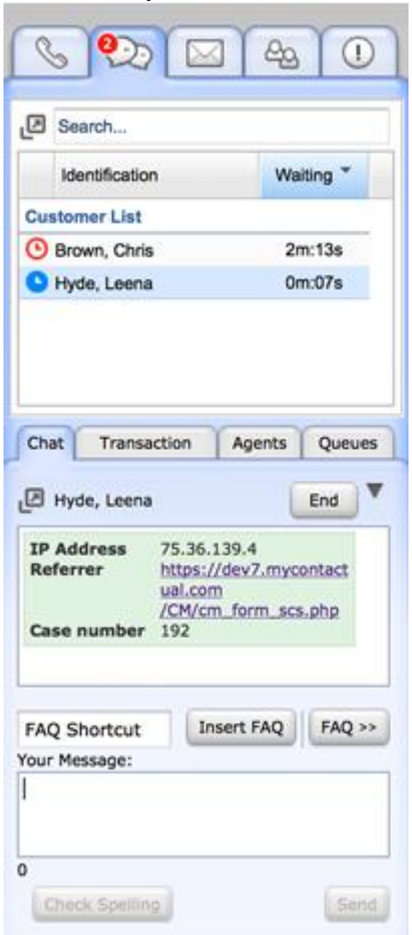


6. Status icons indicate if a customer has sent you a message and waiting for your response. If the customer waiting time exceeds SLA, an alert icon in red shows up in the chat list. For details, refer to Multi-Chat Table.



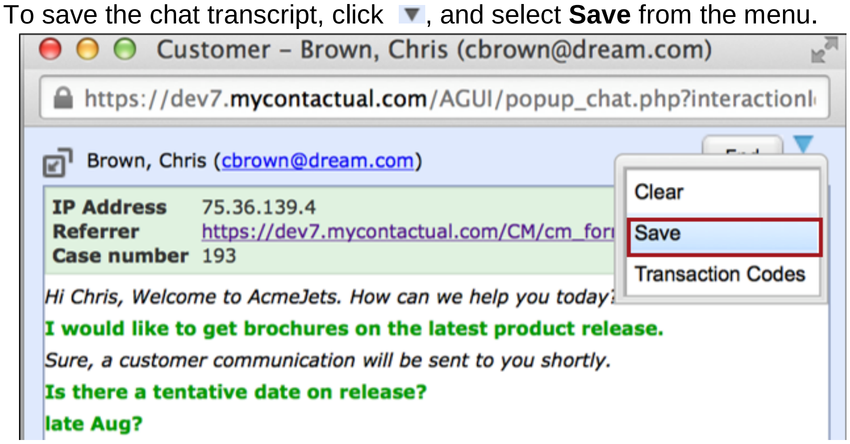


7. To accept a second incoming chat, click **Accept**. The customer chat list gets updated automatically.

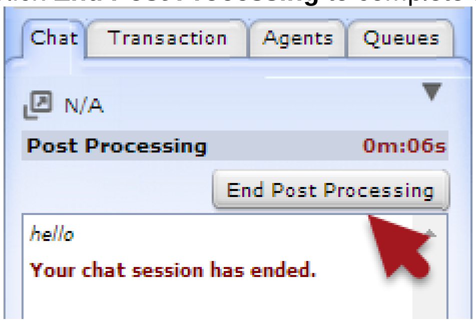


8. Open the chat window as desired. When you are done chatting, terminate the chat session by clicking **End**.

9. To save the chat transcript, click ▼, and select **Save** from the menu.



10. Click **End Post Processing** to complete the session.



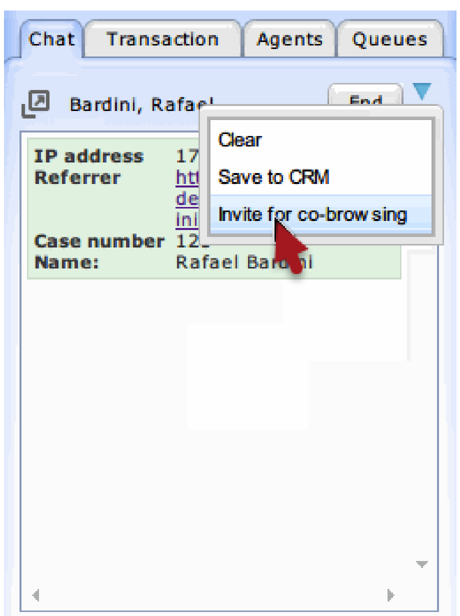
Note: The customer name remains in the chat list while the post processing window is open. Closing the pop-out chat window closes the window, but does not end the chat.

Co-Browse Via Chat

Once the administrator enables co-browsing for chat, agents can invite customers for co-browsing during a chat session in Agent Console.

To start and stop co-browsing:

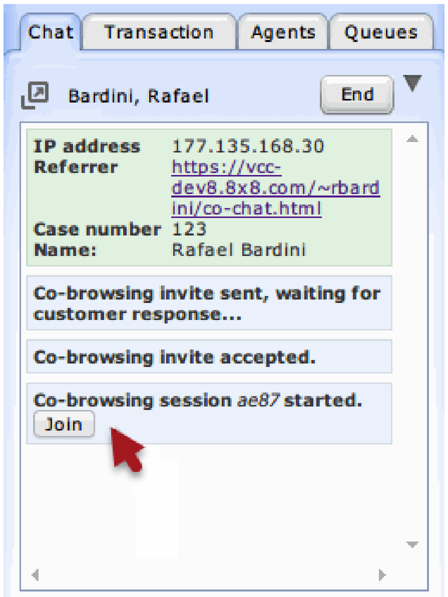
1. Log in to Agent Console.
2. Accept the incoming chat interaction.
3. Open the chat interaction menu, and select **Invite for co-browsing**.



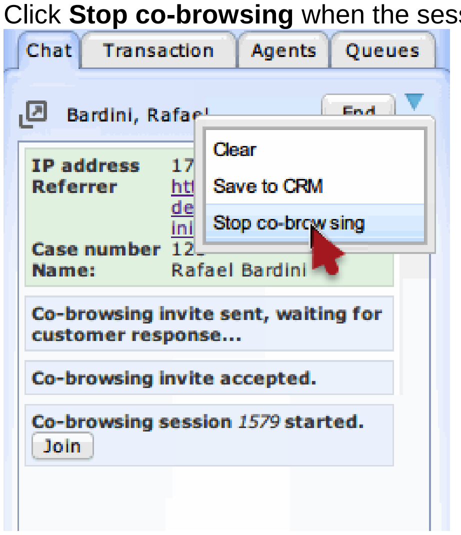
The customer is prompted to accept the invitation for co-browsing, and clicks **Yes, Start Sharing**.

The agent is notified when the customer accepts the invite.

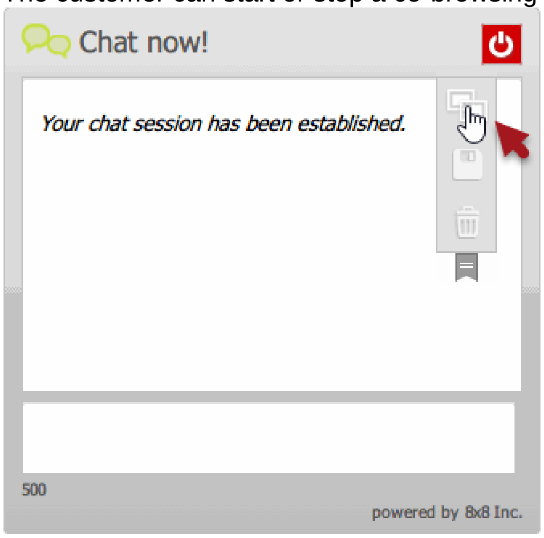
4. Click **Join** to continue.



Click **Stop co-browsing** when the session ends.



The customer can start or stop a co-browsing session by clicking  in the **Chat** window.



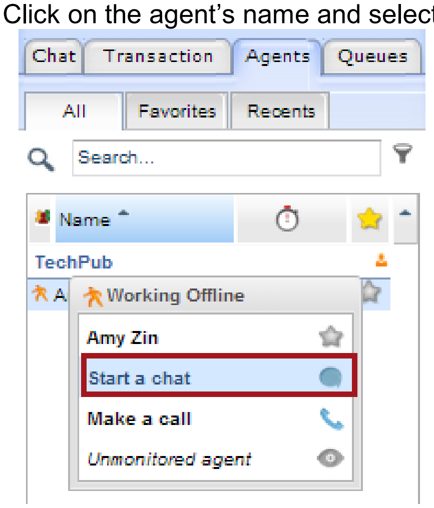
Agent-to-Agent Chat

Agents can have an unlimited number of chats with agents of the same functional group, such as sales or support, in the same tenant. You can chat with other agents in your group to consult, seek advice, or inform of a customer call transfer. You can initiate an agent-to-agent chat via a menu option in the Agent Status tab. Agent Status tab can be accessed via Status tab  in Control Panel.

To initiate a chat with an agent:

1. In the Control Panel, go to the **Status > Agent Status** tab from the Two Tabs view.
2. find the agent you wish to chat with from the agents list.
   The agents list can also be accessed from **Phone > Agents** or **Chat > Agents**.

   Note: You need to be part of the same functional group to be able to see and chat with another agent. Supervisors, however, can see and chat with the agents of other groups.
3. Click on the agent's name and select **Start a chat** from the menu. The chat window opens.



4. Type your message, and click **Send** or press **Enter**.

    Note: Status icons indicate pending agent chat messages. These icons disappear when you respond to the message. For a complete description of the status icons, refer to the Multi-Chat Table.

5. Click **End** to finish a chat session.

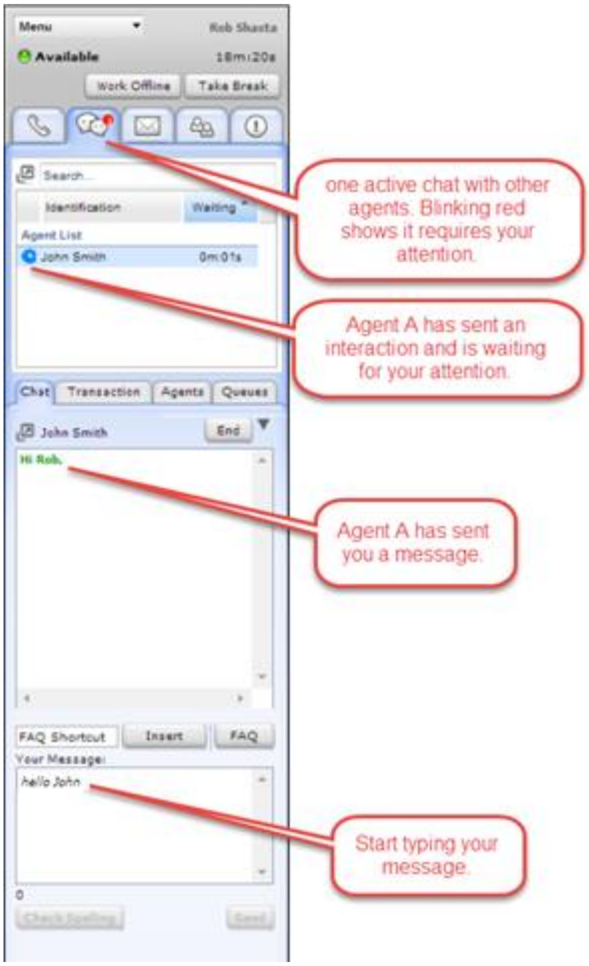
    Note: There is no button to accept or reject agent-to-agent chat. The chats are received automatically.

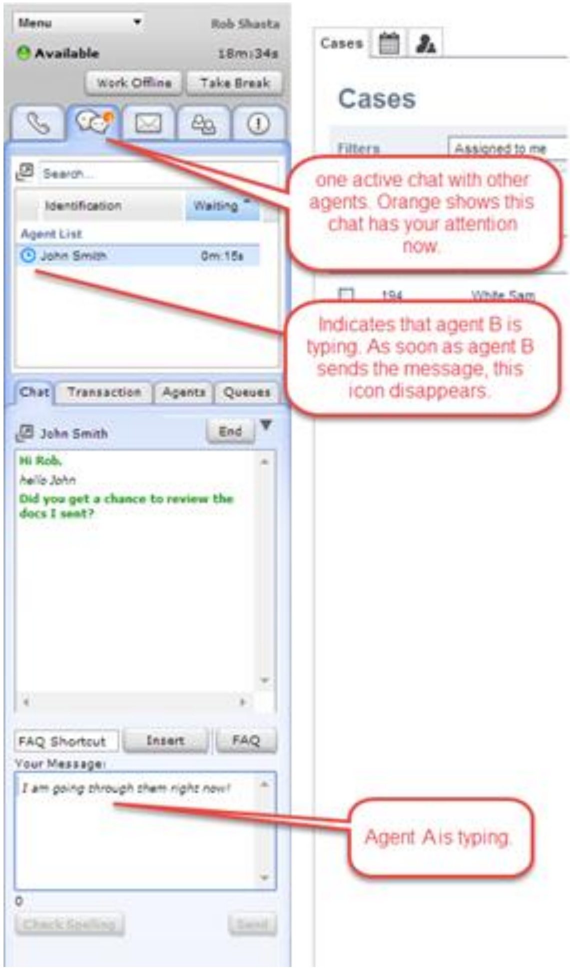
As agent B, the moment you receive a chat request from agent A, the number on the chat tab starts blinking red as shown in . In addition,  indicates that a chat requires your response. Note that agent A appears in the **Agent List**.

To process an incoming chat from an agent:

1. In Agent Console, click the Chat tab.
2. Start typing your response in the **Your Message** text box.

3. Click **Send**.


Menu
Rob Shasta
Available
18m:20s
Work Offline
Take Break
Search...
Identification
Waiting
Agent List
John Smith
0m:01s
Chat
Transaction
Agents
Queues
John Smith
End
Hi Rob.
FAQ Shortcut
Insert
FAQ
Your Message:
hello John
0
Check Spelling
Send
one active chat with other agents. Blinking red shows it requires your attention.
Agent A has sent an interaction and is waiting for your attention.
Agent A has sent you a message.
Start typing your message.



Multi-Chat Table

The following table shows and describes the status icons found in multi-chat:

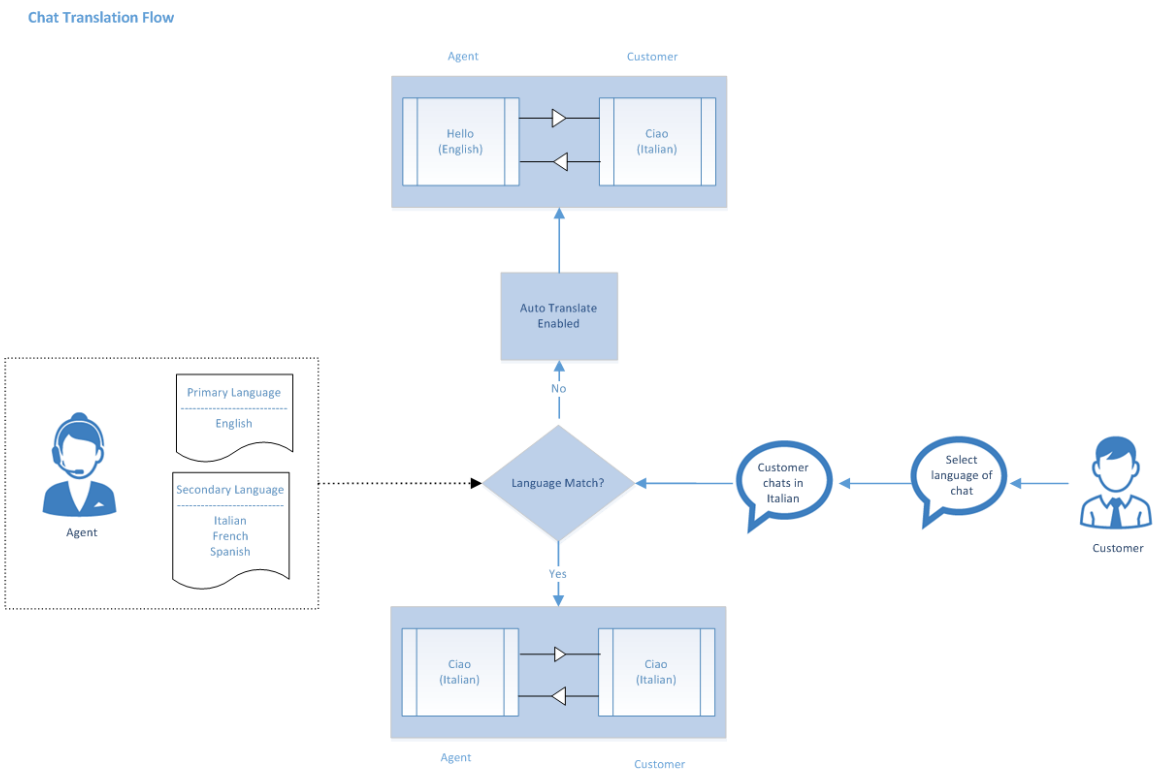
Icon	Description
	A chat has arrived, and is waiting for the agent to accept.
	A chat is offered to the agent, and is waiting to be accepted or rejected.
	Accept the offered chat.
	Reject the offered chat.
	There is one active customer chat for the agent. Orange indicates that the agent has sent their response to the customer.
	There is one active customer chat for the agent, pending the agent's response. Red indicates that the response is past SLA.
	Indicates that the customer or second agent has sent an interaction, and is waiting for the agent's response.
	Indicates that the agent has read the message, but has not responded yet. **Note:** Once the agent responds to the chat message, the timer icon

Icon	Description
	disappears.
	Indicates that the customer has sent an interaction and is waiting for longer than the targeted service level. There is no such alert for an agent.
	Indicates that the agent has read a message that was pending longer than 30 seconds.
	There is one active agent chat for the agent. Orange indicates that the agent has responded to the other agent, and not yet reached the targeted service level.
	There is one active agent chat for the agent, pending the agent's response. Red indicates that more than 30 seconds have passed since the agent last responded to the other agent.

The following diagram shows multi-chat status icons from an agent's point of view:

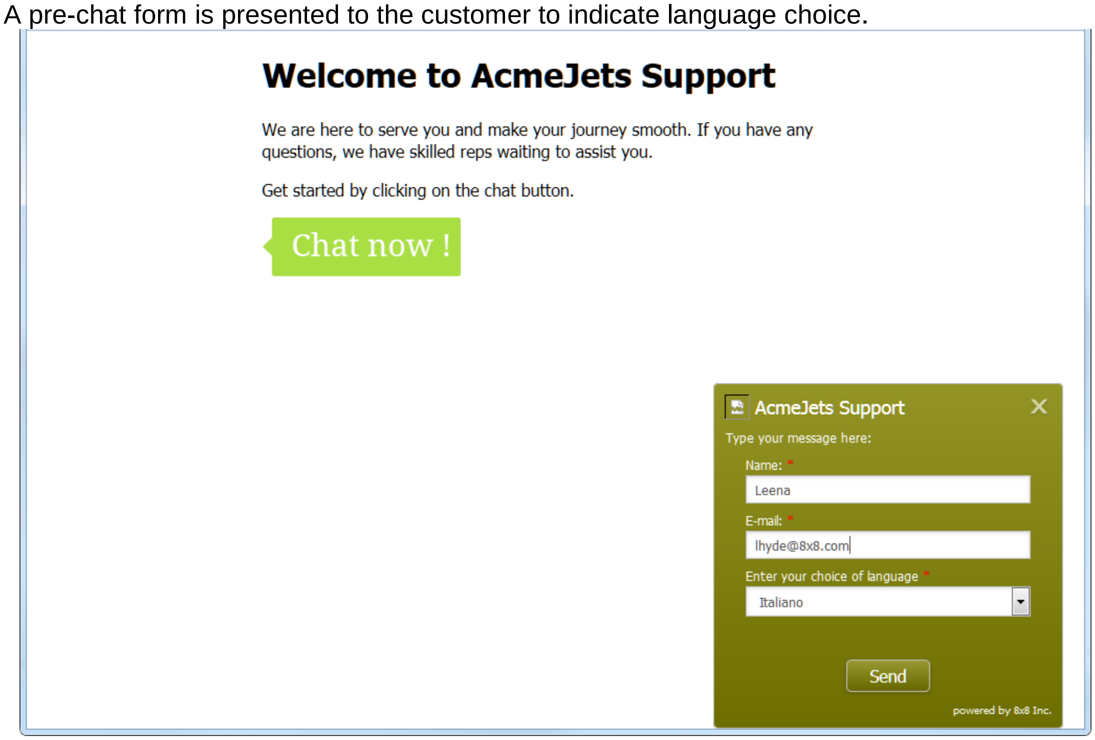
Handle Multilingual Chats

As an agent, you are assigned with a primary language and one or more languages of fluency. If the chat request is not in any one of these languages, you can use the automatic translation tool to process the request. The tool translates chat conversations between you and the customers, offering the flexibility to communicate in a language of fluency. Hosted Contact Centre offers chat translation support for English, Russian, German, Japanese, Spanish, French, Chinese, Portuguese, Italian, and Polish.



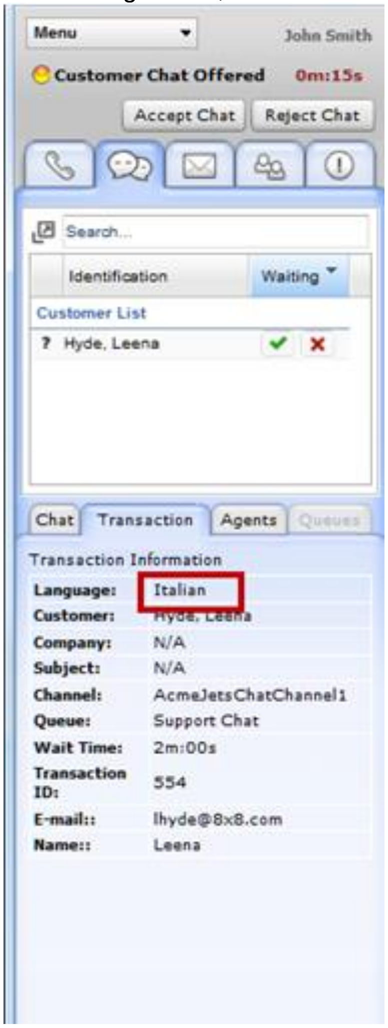
The multilingual chat flow can be represented as follows:

1. A customer visiting a website initiates a chat by clicking the chat button.
2. A pre-chat form is presented to the customer to indicate language choice.



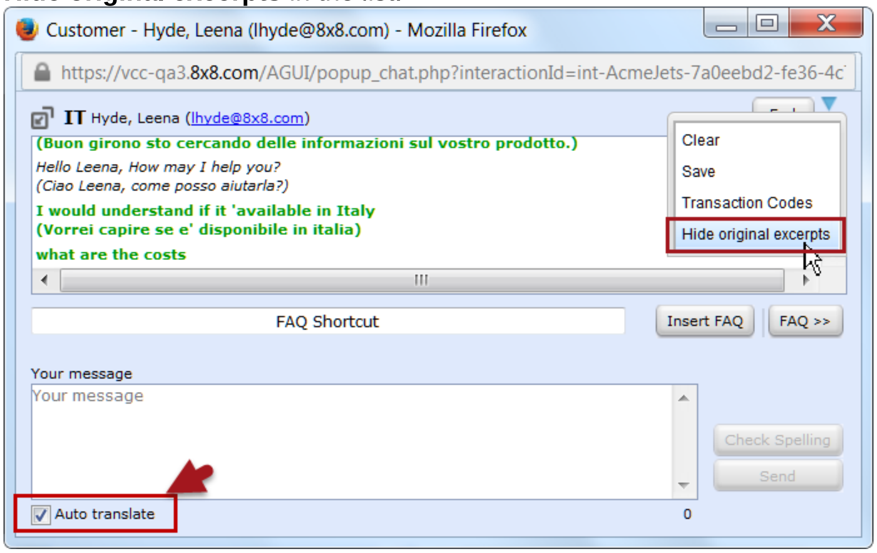
3. The customer fills in the form, selects a language to chat in, and submits the chat request.

4. The request enters the chat queue in Hosted Contact Centre, and is offered to an agent.
5. On receiving a chat, the Control Panel indicates the language of choice for the chat.

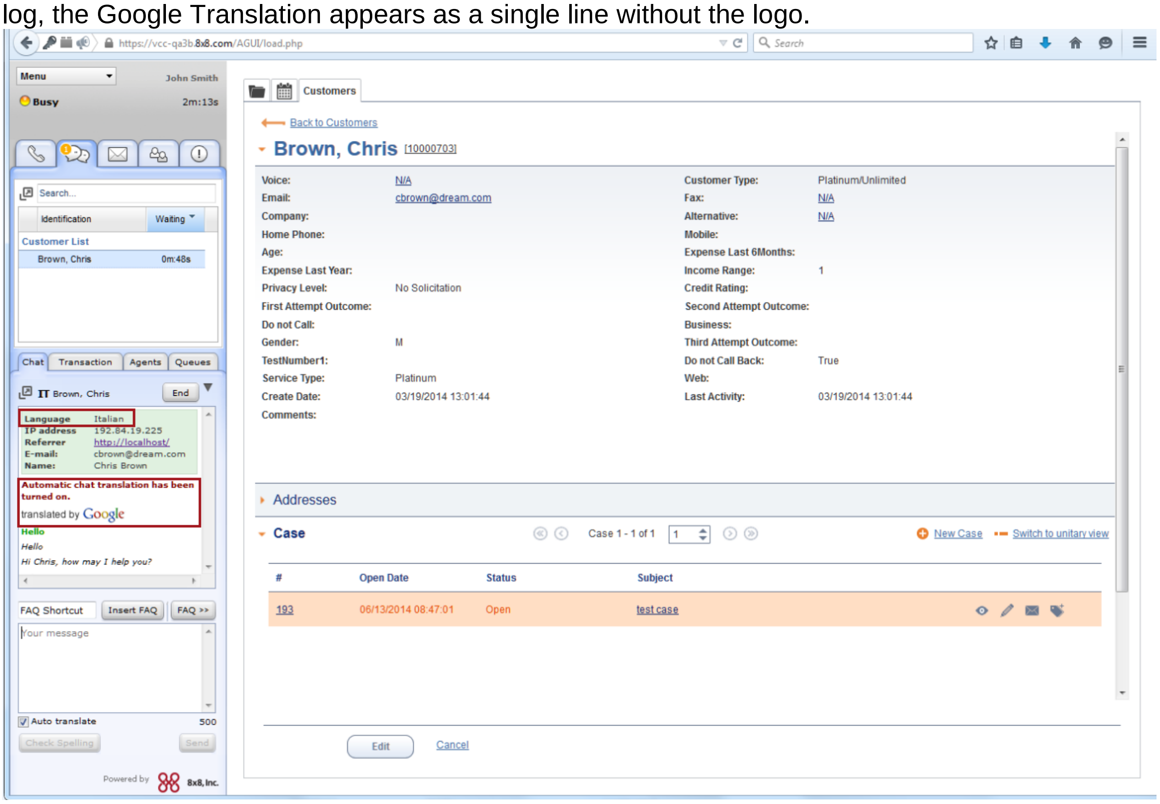


6. On accepting the chat, agents can process the chat using their language of fluency, or use the automatic translation tool. You can choose to hide the original language by selecting

Hide original excerpts in the list.



Note: Automatic translation is available only in the absence of language match or a secondary language match. The Google translation logo then shows under the chat window in the Control Panel. The logo appears only the first time during an interaction. On the chat log, the Google Translation appears as a single line without the logo.



In the case of a primary language match, automatic translation is disabled.

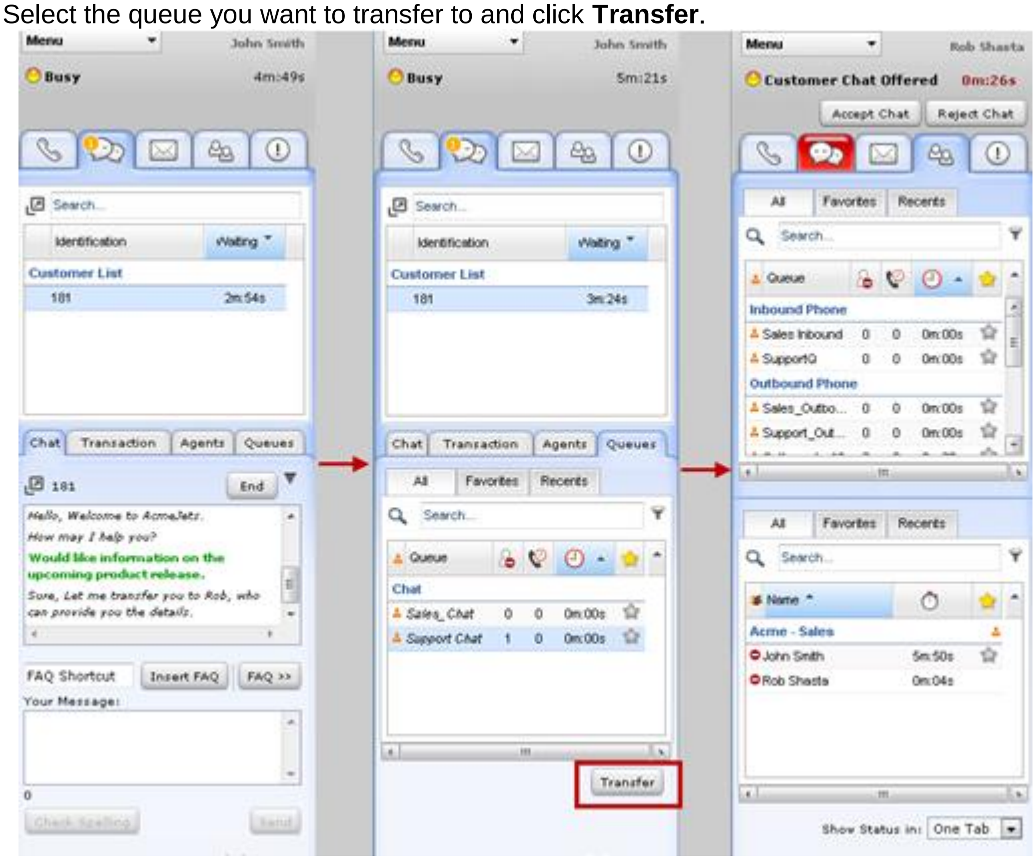
7. By using the translation tool, messages from the customer are translated to the agent's primary language and vice-versa.

Transfer Customer Chats to a Different Queue

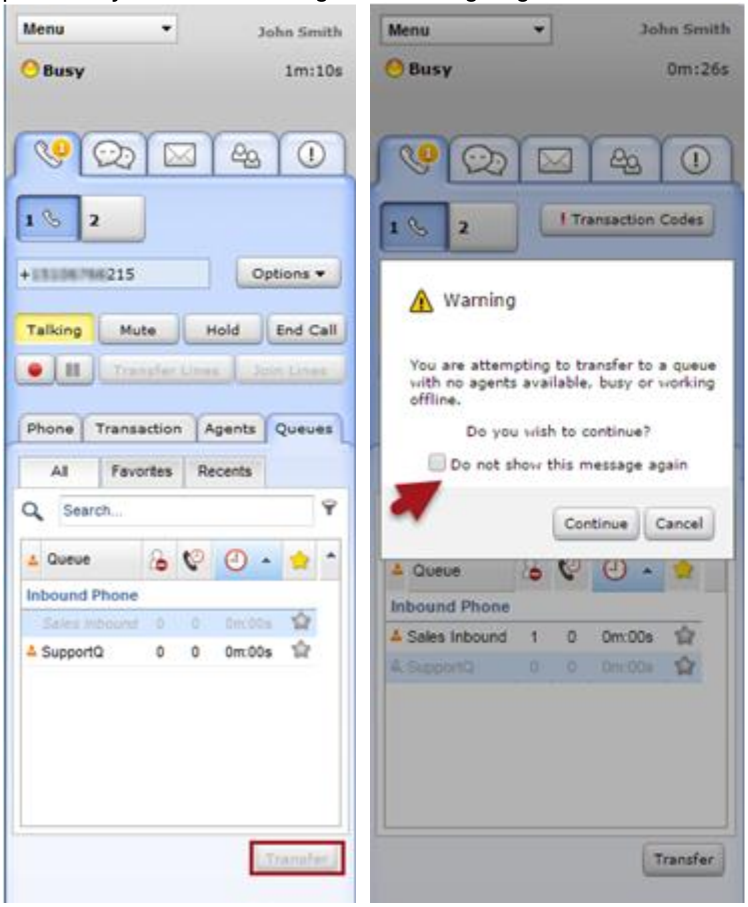
If you wish to transfer an ongoing chat to another queue, you can transfer it in just a few clicks. During a chat, Agent Console gives you the visibility to other chat queues, whether you are part of them or not. Simply select a queue, and click **Transfer**. The chat terminates at your end, and transfers to an agent available in the other queue.

To transfer a live chat:

1. Inform the customer about the transfer.
2. Click the **Queues** tab in the Control Panel. The Queues tab lists the chat queues available to accept the transferred interaction.
3. Select the queue you want to transfer to and click **Transfer**.



Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Hosted Contact Centre administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.



The chat is transferred to the queue instantly, and offered to the first available agent on the queue.

Save Chat Logs

You may need to refer to your conversation with a customer after you end a chat session. Agent Console gives you the option to save your chat conversations. At the end of a chat session, you can save the chat transcription as a chat log. If the chat is from an existing customer, the chat log is automatically associated with the customer record as a new case or follow-up.

To save a chat transcription:

1. Click ▼ on either the **Chat** window or the chat **Pop-out** window.
2. Select **Save to CRM** from the menu. A new case is generated for new customers.

   Note: For existing customers, the chat transcript is saved as a follow-up case.
3. Select **Transaction Codes**.
   Transaction Codes indicate the outcome of an interaction, and can be optional or enforced depending on the company's policy.
4. Click **End** to end the chat.

5. Click **End processing** to complete the session.

   Note: If transaction codes are mandatory, you cannot end Post Processing until you select a code.

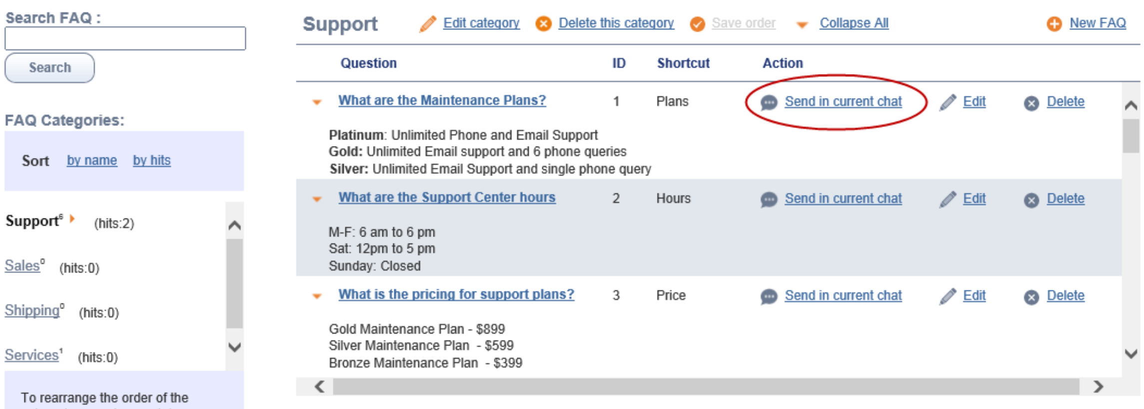
Insert FAQ Responses into Chat Interactions

If your contact centre maintains an FAQ knowledge base, you can extract relevant data from the knowledge base and insert these FAQ responses in a live chat session to assist customers. Using these FAQ responses minimizes agents' time in finding the right information, and maintains consistent delivery of information.

During a chat session, you can refer to the FAQs by shortcuts or by going to the FAQ knowledge base. Referring to shortcuts requires prior definition of shortcuts while creating an FAQ.

To insert an FAQ response during a live chat session:

1. Go to **Help > FAQ** from the Control Panel menu.
2. Search for the relevant information by keywords or FAQ category.
3. After finding the relevant FAQ, click **Send in current chat**.



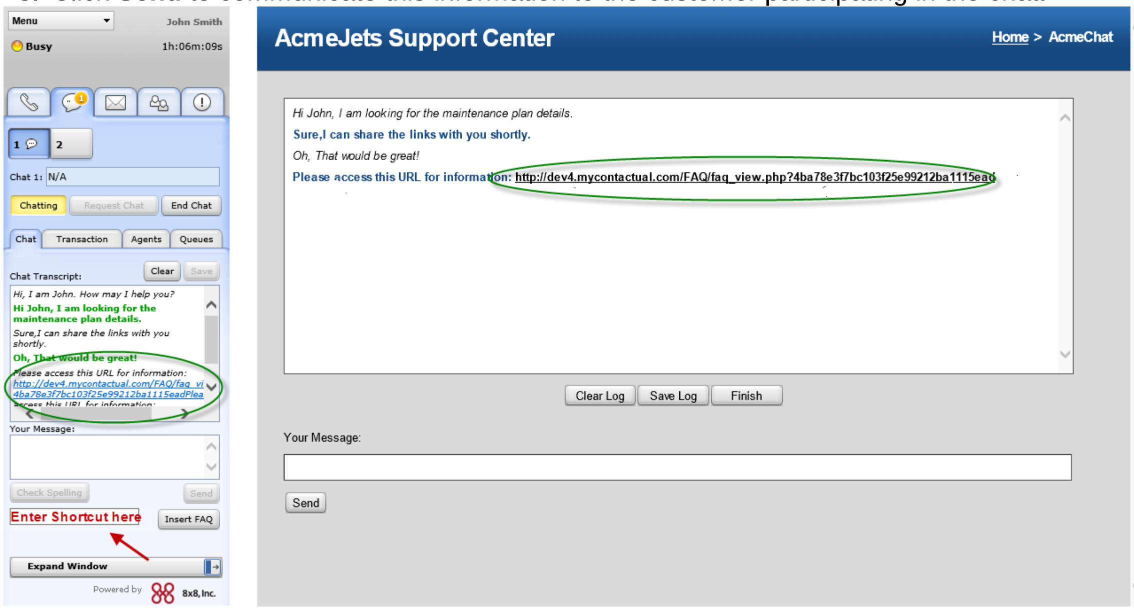
The FAQ content is instantly communicated to the customer.

To insert an FAQ shortcut:

Inserting an FAQ by shortcut requires you to know the shortcuts beforehand. Each shortcut is linked to an FAQ item it is defined for. If you do not remember the shortcut, you can go to the FAQ knowledge base.

1. During a live chat, enter the FAQ shortcut that refers to the information customer is looking for in the **Shortcut** entry window.
2. Click **Insert FAQ**.
   A link to the FAQ inserts in the chat interaction window.

3. Click **Send** to communicate this information to the customer participating in the chat.



PROCESS EMAIL INTERACTIONS

Email interactions provide a means of receiving and responding to customer inquiries using Agent Console.

Processing email interactions using Agent Console requires access to Local CRM. If your Agent Console is configured to interoperate with an external CRM, the Local CRM continues to process all email interactions received by Agent Console.

When Agent Console offers you a new email interaction, the Local CRM presents the email in the Display Panel. Based on the email ID or case ID contained in the email, the Local CRM searches for matching records.

- If the From field of the message contains the email address of an existing customer, the relevant customer record pops up, and the incoming email is saved as a new case for the customer.
- If the subject of the email bears a valid case ID from the Local CRM, the customer record pops up, and the incoming email is saved as a follow-up of the relevant case.
- In the absence of matching data, a new customer and case record are created.

For information about configuring your Agent Console profile's email settings, see Configuring Your Agent Profile.

Email Interaction Features

The Agent Console email controls enable you to:

- Accept inbound email interactions.
- Reply immediately to an email interaction, or save a partial reply for later processing.
- Transfer an email interaction to a different queue.
- Insert pre-formatted answers to frequently asked questions into email replies.

- Pull and optionally delete unread email messages from your email queues, if your agent account permissions allow it.

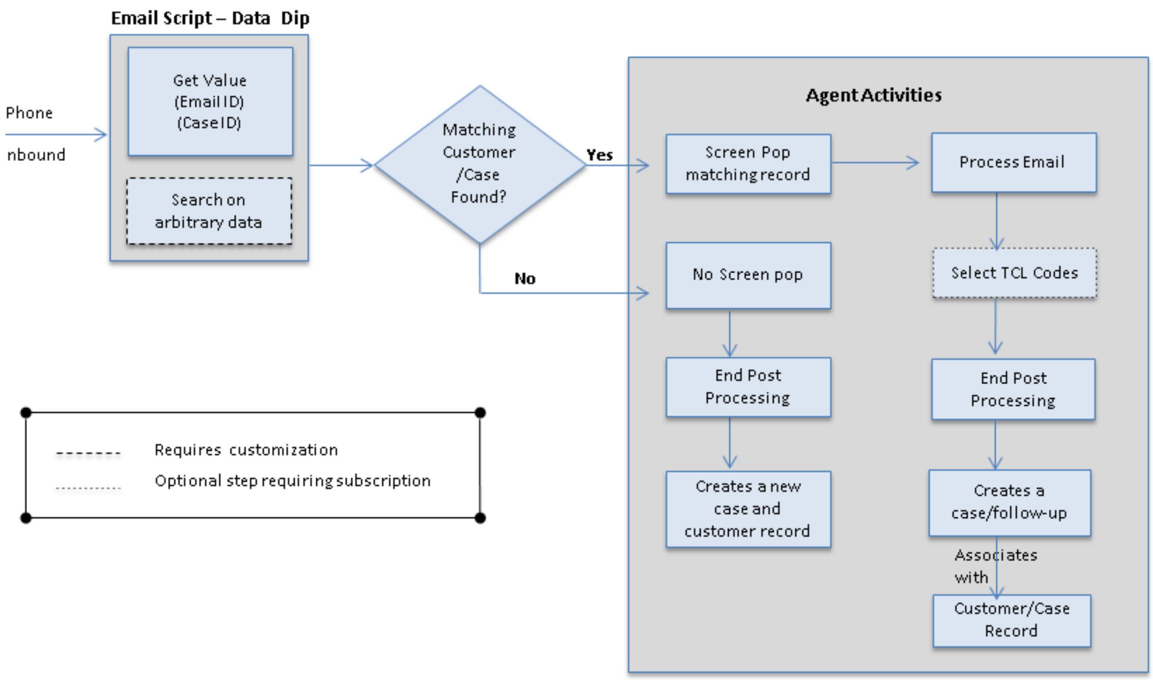
Inbound Email Work Flow

Email interactions flowing into Hosted Contact Centre stay in an email queue until an agent is available. When an agent is available, the longest-waiting email in the queue is offered to the agent. Hosted Contact Centre searches the Local CRM database for existing customer records based on email ID or case number. If the email is from an existing customer, the relevant customer record is presented to the agent via screen pop. In the absence of a matching record, a new customer record is created.

Screen pop occurs either before or after the agent accepts an interaction, based on the screen pop settings configured by contact centre administrator. The agent processes the email and may select transaction codes to indicate the disposition. Selecting transaction codes may be optional or mandatory based on the settings. The email processing ends, and the agent gets post-processing time for a final wrap-up. If codes are mandatory, the interaction stays in post-processing mode until codes are selected.

The sequence of events in an inbound email flow may be represented as follows:

Inbound Email Work Flow



Accept Email Interactions

Hosted Contact Centre directs emails to agents via an email queue. Agent status must be Available to receive these incoming emails. When an incoming email is offered to an agent, the Email tab blinks, indicating an incoming request. The agent can accept or reject the request. On accepting, the agent's status changes to Busy. On rejecting the email, the agent's status changes to Working Offline.

Pre-requisites

To receive emails, agents must be:

- In the Available state.
- Assigned to an enabled email queue.

  Note: You can view or edit your queue assignments in the Agent Profile. For details, refer to Viewing Agent Assigned Queues.

If an email queue has pending emails, you can:

- Pull all queued emails at once.
- Accept one email at a time.

  Note: Pulling emails is a privilege given by the administrator in Configuration Manager.

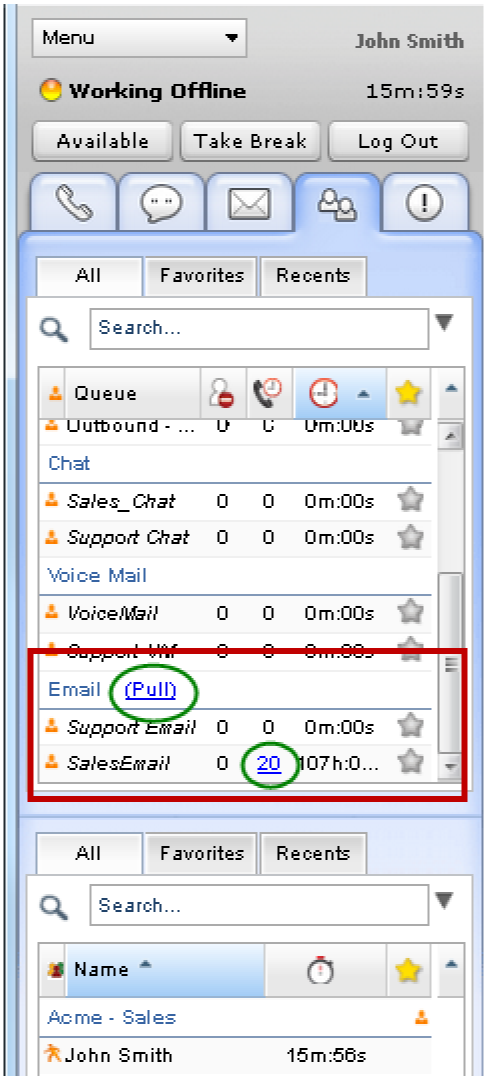
Pull Emails

Pulling emails from a queue gives you the flexibility to quickly look at the sender or the subject of the email, and then accept an email that requires the most immediate attention. The Status tab in the Control Panel lists your email queues, and indicates the number of emails pending in a queue.

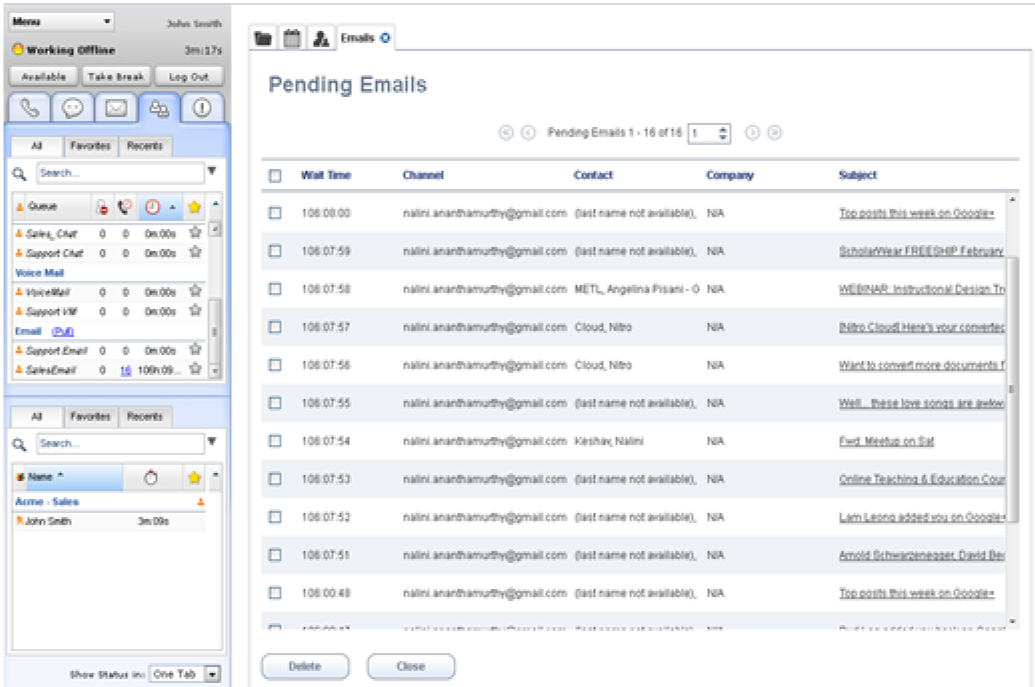
To pull emails from a queue:

1. In Agent Console, set your status to **Working Offline**.
   If your status is Available, Agent Console may offer you a new interaction before you can complete pulling email interactions from an email queue.
2. Go to the **Status** tab in the Control Panel.

3. Click **Pull** or the number of emails.



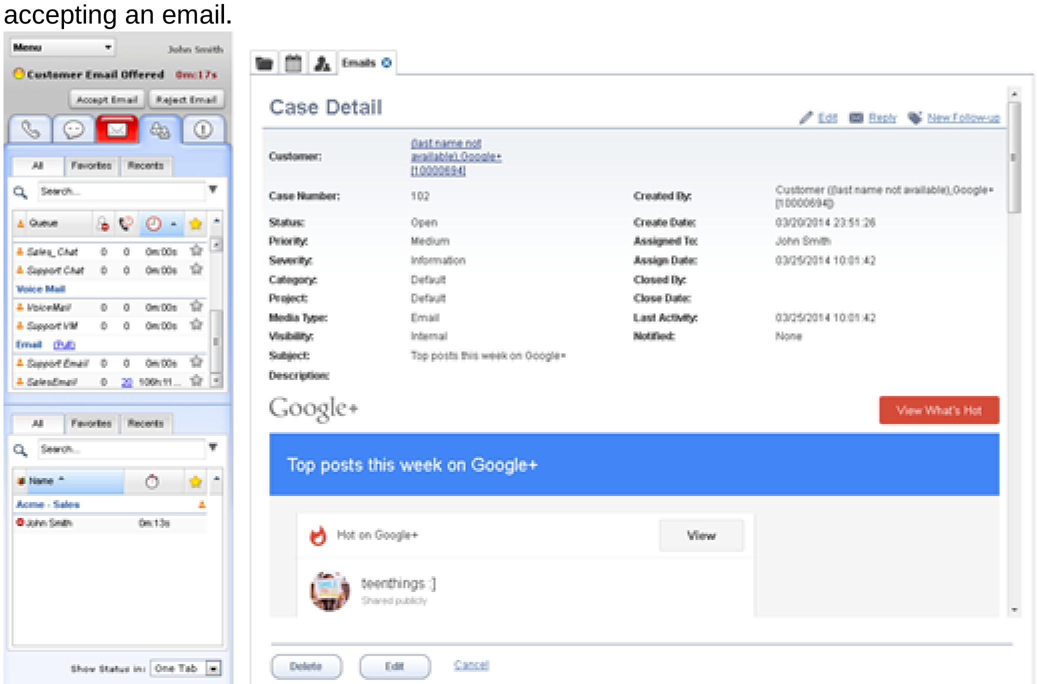
Agent Console pulls all emails from the queue, and presents the list in the Display Panel.



Note: If your Hosted Contact Centre administrator has given you the necessary permissions to delete, you can identify unwanted emails from the list of pending emails, select, and delete them. To delete emails, see Delete Emails from a Queue.

4. Check the sender and/or subject of the email, and click under the **Subject** column of an email you wish to open.

The email is offered to you instantly. The email tab blinks red. The work flow is the same as accepting an email.



If the email is from an existing customer, a relevant case or customer record pops up for preview as well.

Note: If you have multiple emails opened in tabs, the screen pop tab, which displays the case number and customer name, helps you navigate better.

5. Click **Accept Email**.
   Your status changes to Busy. The email creates a case, and opens in a new tab.

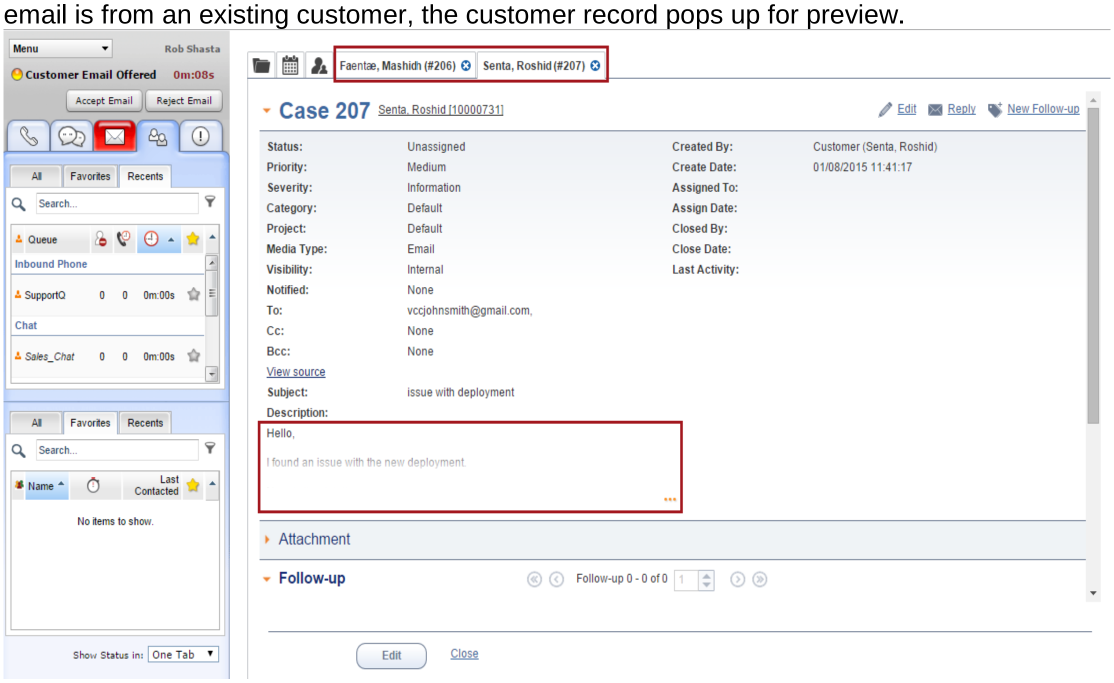
6. Your status changes to Post Processing, and then back to Available. The email saves as a case in the Open state, and is assigned to you.
   You can edit case details, reply, or create a new follow-up.

   - *To edit, click* **Edit**. *Read more* [2]
   - *To reply, click* **Reply**. *Read more* [3]
   - *To create a new follow-up, click* **New follow-up**. *Read more* [4]

Accept One Email at a Time

To accept one email from the queue:

1. Change your status to **Available**.
   If you have an incoming email, the Email tab in the Control Panel blinks red. If the incoming email is from an existing customer, the customer record pops up for preview.



2. Preview the customer or case data, and click **Accept Email**.
   Your status changes to Busy. The email creates a new case or follow-up record, and opens

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[2] In the edit mode, you can change case details such as the status, priority, severity, subject, and more. Select Notify to notify another colleague or the customer about case details. For more details on editing case records, see Create and Edit Case Records.
[3] In the reply mode, you can respond to the customer email, or insert case details, attachments, or content from FAQ knowledge base. The case information (original email) is attached automatically.
[4] You can create a new follow-up, respond to the customer email, or insert case details, attachments, or content from FAQ knowledge base. The follow-up record does not include the original email.

in a new tab. The screen pop tab that presents the email displays the case ID and customer name.

Note: If you have multiple emails opened in tabs, the screen pop tab, which displays the case number and customer name, helps you navigate better.

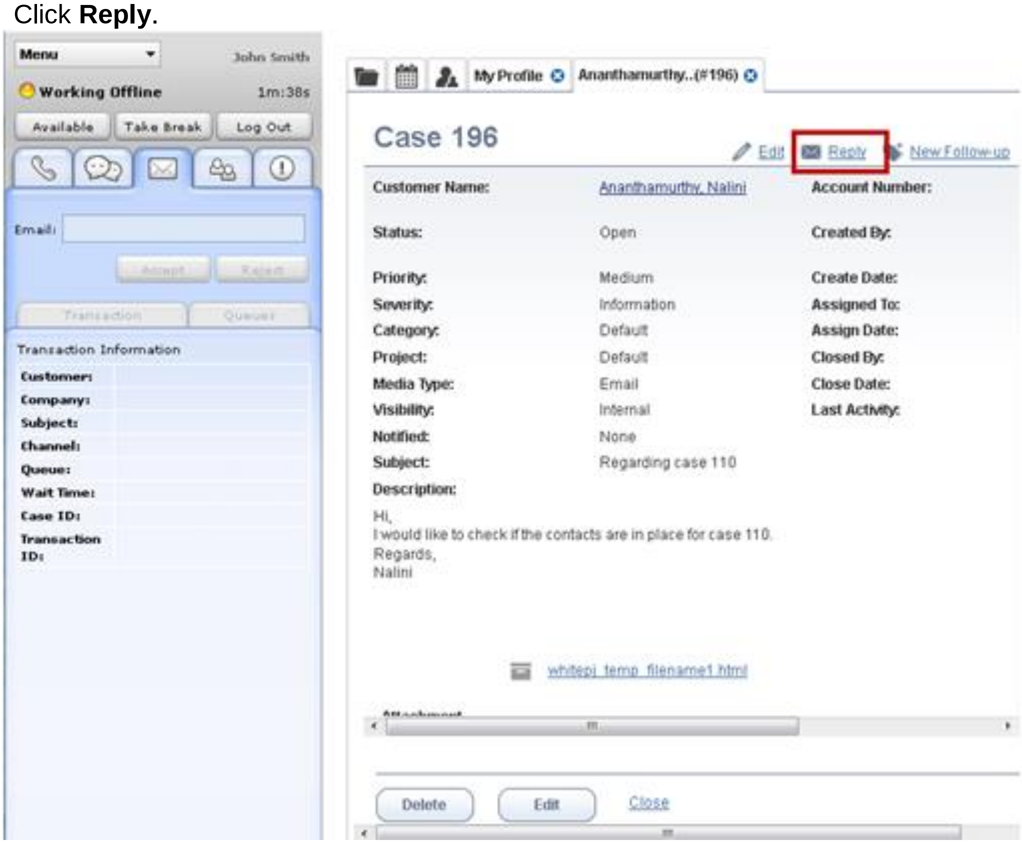
3. Your status changes to Post Processing, and then back to Available. The email saves as a case or follow-up in the Open state, and is assigned to you.
   You can edit case details, reply, or create a new follow-up.

Respond to Emails

When you accept emails, they are saved as cases in the Open status, and are assigned to you. If you respond to these emails, you create new follow-ups.

To respond to an email:

1. Go to **Cases** tab and open the desired case.
2. Click **Reply**.



A new tab opens to create a new follow-up for the case. The customer's email ID and the email content are automatically populated. The Subject indicates the case number.

3. Select **Signature**.
4. Compose your response to the email in **Description**.
5. In the **Attachment** section:

- Click **Select files from cases/follow-ups**.
  A list of attachments linked to the case and/or follow-ups is displayed.

  OR

- Click **Attach files or drop files here** to select a file from your computer.

6. Select the desired attachments.

   Note: You can add email attachments that are already linked to the case or the follow-ups while replying to or forwarding the email. There is no limit on the number of attachments, as long as they do not exceed a total of 20 MB.

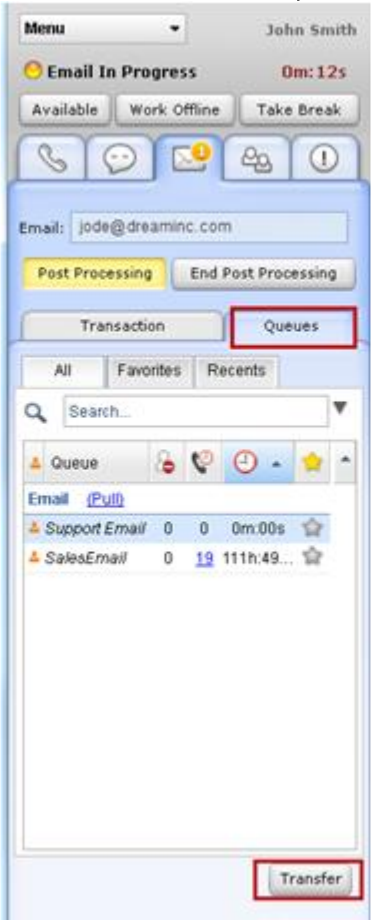
7. To save a draft of the interaction for completion at a later time, click **Save as Draft**.
   The follow-up record is added to the case as a draft.
   OR
   Click **Send** to send the completed reply.

8. To view your drafts, click the **Cases** tab.

9. In the **Filters** drop-down, select **My Drafts** from the list, and click **Go**.
   From the list of drafts, select the draft you want to view. For information about working with cases, see Create and Edit Case Records.

Transfer Emails to a Different Queue

After accepting an email, you may want to transfer it back to the same queue or another queue to be handled by better skilled agents, or to tend to historical handling. You can transfer an email interaction to a different queue after you accept the email and during the post processing time.



To transfer a new email interaction to a different queue:

1. In the Control Panel and from the Email tab, accept an email interaction offered.
2. During post processing timeout interval, and from the Two Tabs view, go to the **Queues** tab in the Control Panel.
3. Select the queue to transfer the email interaction, and click **Transfer**.

   Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Hosted Contact Centre administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.


Menu
John Smith
Busy
1m:10s
1
2
Options
Talking
Mute
Hold
End Call
Transfer Lines
Join Lines
Phone
Transaction
Agents
Queues
All
Favorites
Recents
Search...
Queue
Inbound Phone
Sales Inbound
SupportQ 0 0 0m:00s
Transfer
Menu
John Smith
Busy
0m:26s
Transaction Codes
Warning
You are attempting to transfer to a queue with no agents available, busy or working offline.
Do you wish to continue?
Do not show this message again
Continue
Cancel
Queue
Inbound Phone
Sales Inbound 1 0 0m:00s
SupportQ
Transfer

The email processing ends on your end and is presented to another agent available in the transferred queue.

Note: You must transfer before the post processing interval lapses.

Insert FAQ Responses into Emails

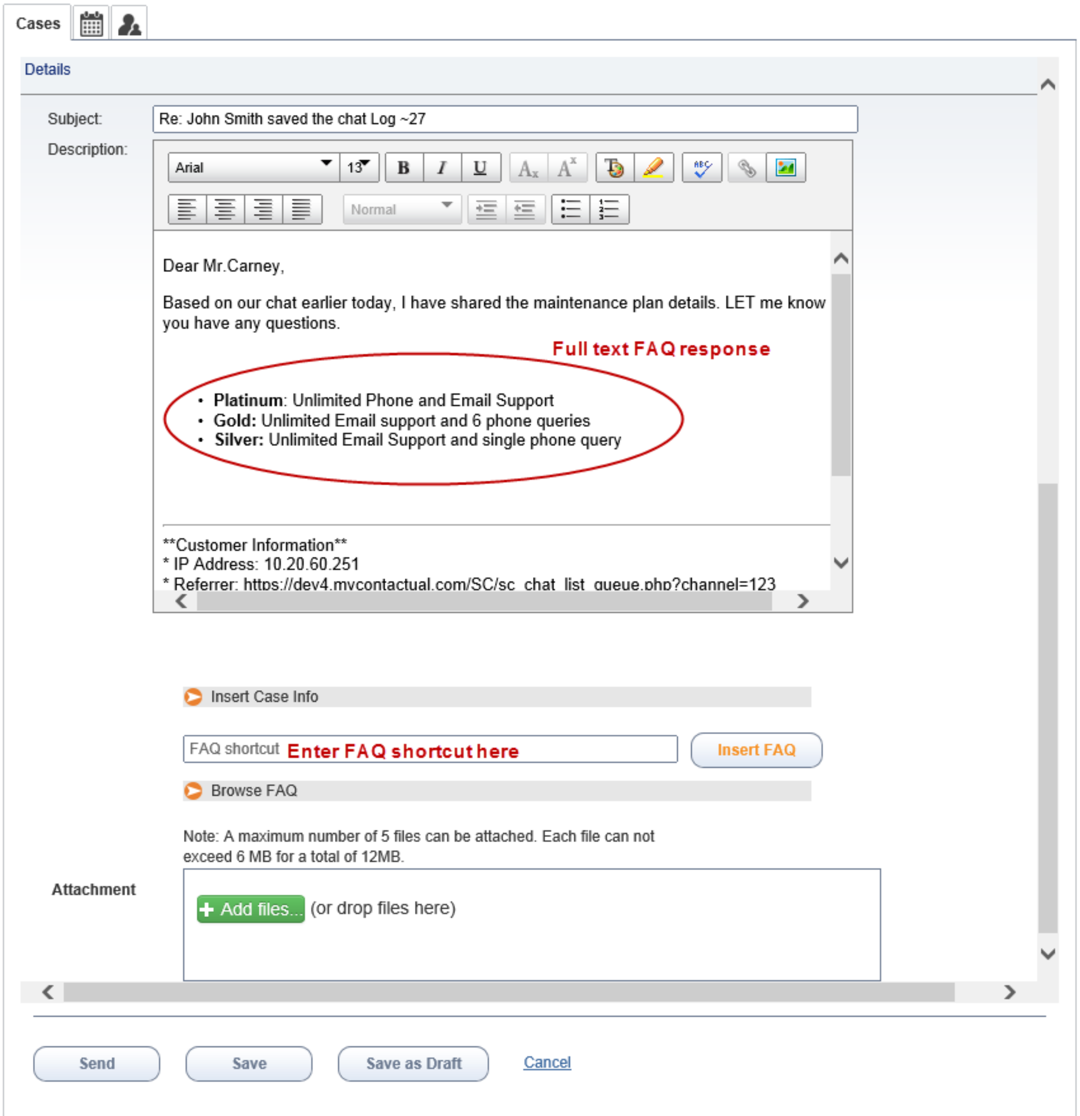
If your contact centre maintains an FAQ knowledge base, you can extract the relevant data from the knowledge base and insert FAQ responses into an email to customers. Using these FAQ responses minimizes agents' time in finding the right information, and maintains consistent delivery of information.

You can insert FAQs in an email by referring to shortcuts or by browsing and searching through the FAQ knowledge base. Referring to shortcuts requires prior definition of shortcuts for an FAQ item.

To insert an FAQ response in an email using shortcuts:

1. While crafting an email, enter the shortcut for the desired FAQ under the email's Description box.

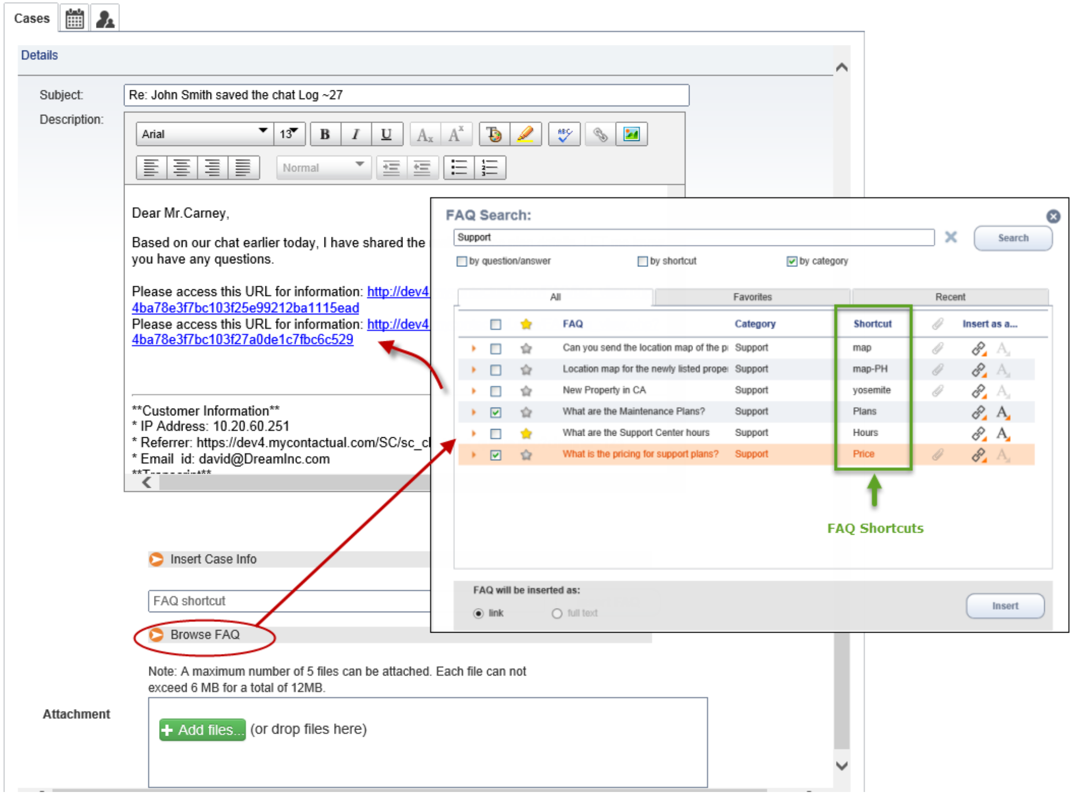
2. Click **Insert FAQ**.
   The full text of the FAQ response is inserted into the email body.



To insert an FAQ by browsing through the knowledge base:

1. While crafting an email, click **Browse FAQ** under email's Description box.
2. Search and locate the desired FAQ.

3. **Insert** the content as a link or as full text by selecting the relevant option.
   The link or the full text content of the selected FAQ is inserted into the email body.



Delete Emails from a Queue

You may be able to pull email interactions from an email queue, but not delete them. Agents can delete emails only if their Hosted Contact Centre administrator has configured their Agent Console account to allow deleting pending email interactions from a queue. If your Agent Console account does not have delete permissions, you are not able to see the Delete button or the check boxes to select emails.

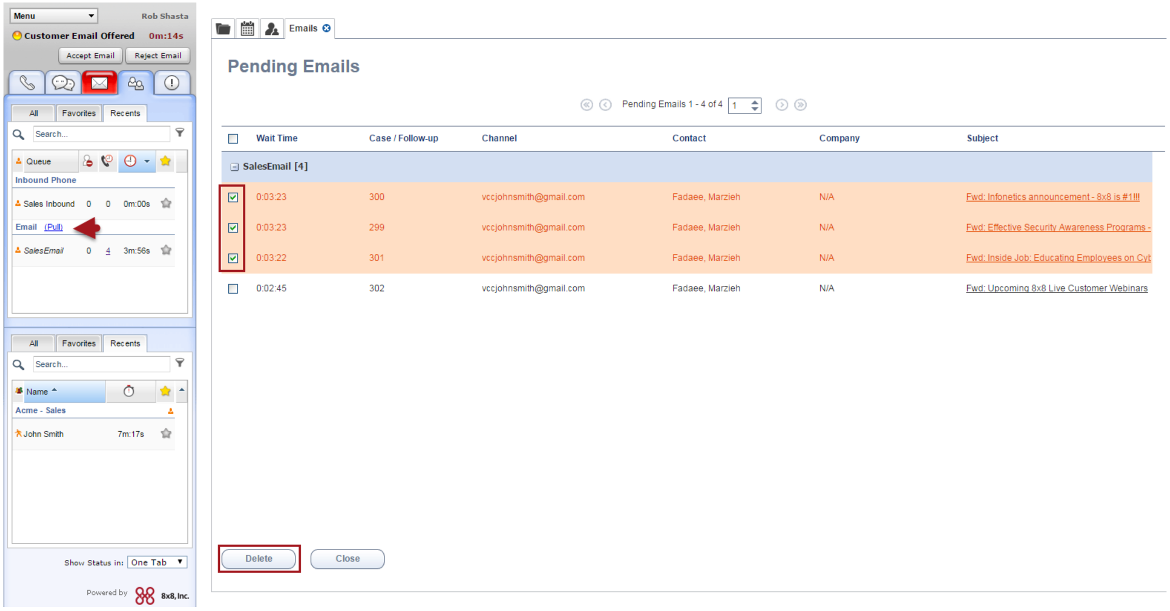
Deleting a pulled email interaction from an email queue:

- Permanently deletes the interaction from the queue.
- Does not delete the customer record associated with the email from the Local CRM.

To permanently delete email interactions from an email queue:

1. In Agent Console, set your status to **Working Offline**.
   If your status is Available, Agent Console may offer you a new interaction before you can complete pulling email interactions from an email queue.
2. Go to the **Status** tab in the Control Panel.

3. Click **Pull** or click on the number of emails.



4. In the list of queued emails, perform one of the following:

   - To remove individual email interactions from the queue, select one or more email messages.
   - To remove all email interactions in the list, select the check box in the column heading.

5. Click **Delete**.
   Agent Console displays a delete confirmation dialog. In the dialog, click **OK** to permanently remove the selected email interactions from the queue.

MANAGE CUSTOMERS, CASES, FOLLOW-UPS, AND TASKS

SaskTel Hosted Contact Centre provides customer and case management capabilities with its Local CRM. The Local CRM provides a model for managing your contact centre's interactions with customers. The Local CRM stores your contact centre's customer, case, and follow-up data.

Hosted Contact Centre's phone, chat, and email scripting can use information about an incoming interaction, such as a phone number, a case number, or an email ID, to locate and display a customer or case record contained in the Local CRM. As an agent, you can use the Local CRM to record and manage your customers, cases, and follow-up activities.

To manage customer relationships, the Local CRM provides the following hierarchy of standard objects:

- Customer
- Case
- Follow-up
- Task

Customers

A customer object allows you to create customer instances with unique account numbers. A customer record stores information, such as name, account number, email, address, and phone numbers, and offers the capability to customize the customer object with custom fields.

Cases

A case object describes a customer's feedback, queries, or issues. You can create cases to systematically track and solve customer issues. You can quickly create, update, and view cases in an expandable window. You may indicate the status of a case as open or closed. The standard definition of a case allows you to add additional attributes to a case by stating the status, visibility, severity, and priority.

For example, a support agent at AcmeJets creates a case when a customer calls in reporting scheduling issues with private jets. The support agent captures and records the customer reported issue by creating a case.

Follow-ups

A case may have multiple follow-ups before it is resolved. Each communication regarding the case from its creation until it is closed may be recorded as individual follow-up instances. This may include notes and email communications regarding the case. The Follow-up object allows you to track how a case is resolved by creating multiple follow-up records.

Tasks

A Task refers to a call, email, meeting, chat, or any other type of contact made with a customer. A task organizes and helps you track all interactions associated with a customer. The task object serves to create, and manage all tasks you plan to perform or have performed, such as making calls or sending mails. For example, you can create a task to schedule a phone call to a customer, and set a reminder. A reminder pops up a few minutes before the scheduled call.

Integrate with External CRM

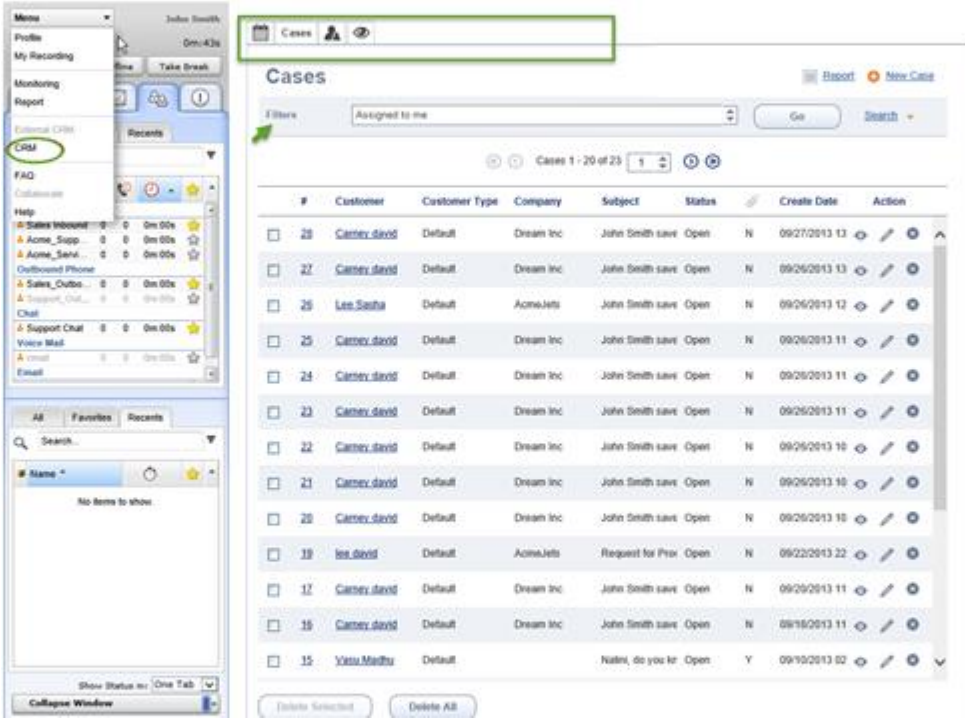
Hosted Contact Centre also supports integration with external CRMs, such as NetSuite and Salesforce. If your Agent Console integrates with an external CRM, your contact centre supervisor provides you with the information you need to use the CRM to manage your customers, cases, and follow-up activities.

CRM Landing Page

When you log in to Agent Console, the Display Panel launches separate tabs for:

- **Cases**: lists cases assigned to you, and groups all related tasks, such as creating a new case, editing, and deleting cases, as well as reporting.
- **Customers**: lists customers assigned to you with centralized access to related tasks, such as editing a customer record or adding a case, a follow-up, or a task.

- **Tasks**: Lists tasks assigned to you with the ability to create new tasks, edit, or delete tasks.



Customize Lists of Customers and Cases

Selecting a CRM tab lists customers, cases, and tasks. Click **Filters** to filter the list as follows:

- **Assigned to me**: open cases and customers whose cases are assigned to you. This is the default option.
- **Assigned to my group**: open cases and customers whose cases are assigned to your group members.
- **Created by me**: cases and customer records created by you.
- **My Draft Customers** or **My Drafts** (for cases): cases and customer records saved by you as drafts.

Create and Edit Customer Records

You can create a new customer record at any time using the New Customer link in the Customers tab, if your administrator has granted the necessary privileges. While processing an interaction, Hosted Contact Centre searches the Local CRM for existing matching data. In the absence of matching customer records, agents are prompted to enter a new record via screen pop.

The following describes the use of the default customer fields. Depending on how your contact centre administrator has configured your Local CRM, the customer creation tool may display additional customer fields.

To create a customer record:

1. Click **New Customer** link in the **Customers** tab.
   Agent Console displays the Create New Customer page.

2. Enter the customer's **First Name** and **Last Name**.
   You must specify the customer's name before you can save the new customer record.

3. Enter the customer's **Email** address.
   Each customer email address must be unique. Agent Console uses the customer's email address to send the customer their optional Support Centre access credentials. To prevent a single customer email address from receiving multiple Support Centre access credentials, Agent Console uses the Local CRM to verify that each customer email address is unique.

4. To require that the customer specify an account number and password to access the contact centre's Support Centre, perform the following:

   a. Select **Restrict customer's access to Support Centre**.

b. To specify the customer's Support Centre password yourself, type a password in the **Password** text entry area.
OR
To have Agent Console create the customer's Support Centre password, select **Generate password automatically**.

Note: When you save the new customer record, Agent Console sends the customer's Support Centre access credentials to the email address specified in the Email text entry area.

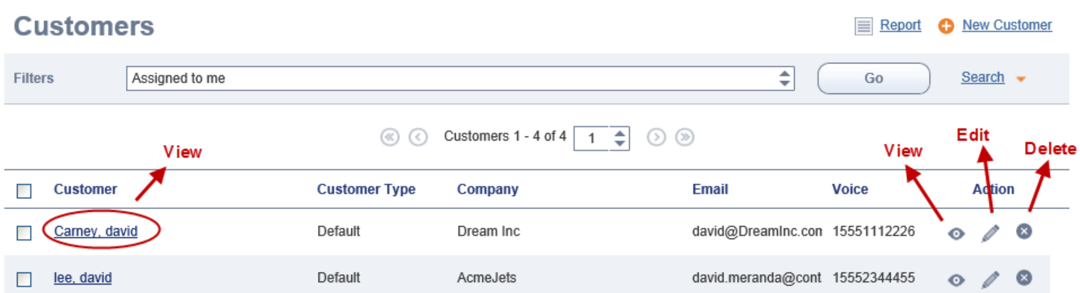
5. Enter the customer's address in the **Primary Address** and **Secondary Address** areas.
6. Select to **Save** the customer or **Save as Draft**.

Edit or Delete Customer Records

After you create and save a customer record, you can edit the information or delete a customer record, provided that you have the permissions to delete and edit. Contact your Hosted Contact Centre administrator to learn about your permissions.

To edit a customer record:

1. Click the **Customers** tab. A list of customers appears.
2. Click one of the actions items available to view, edit, or delete the customer record.
   OR
   Select and open a customer record from the list, and then click **Edit** at the bottom of the page.

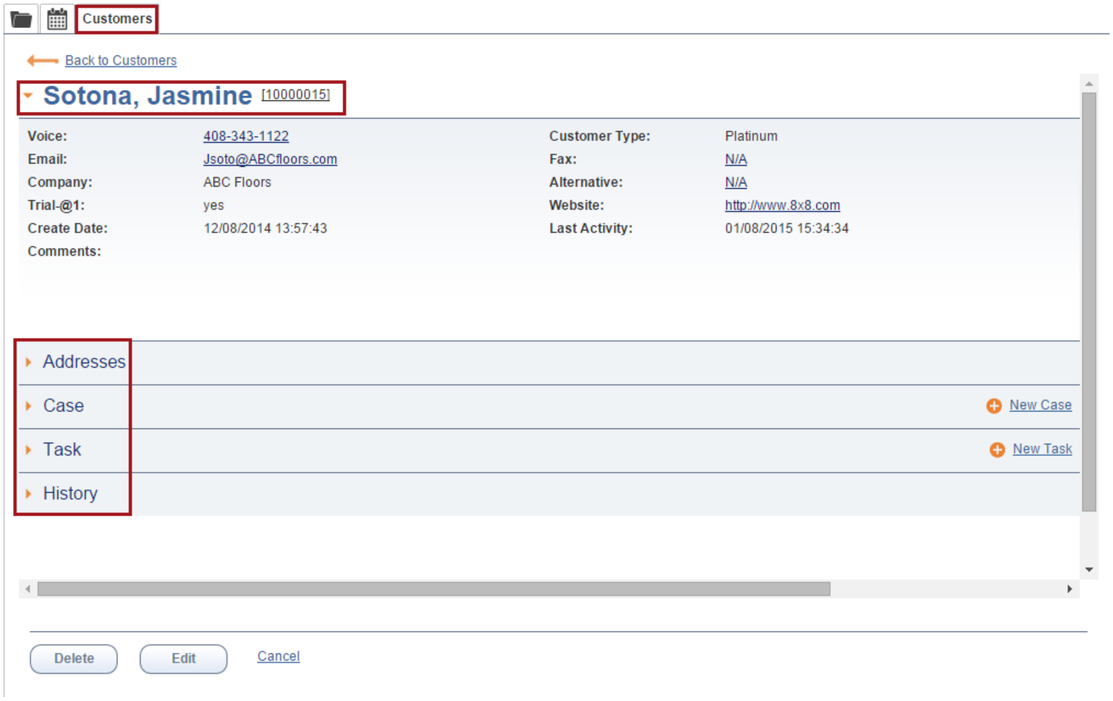


View Customer Records

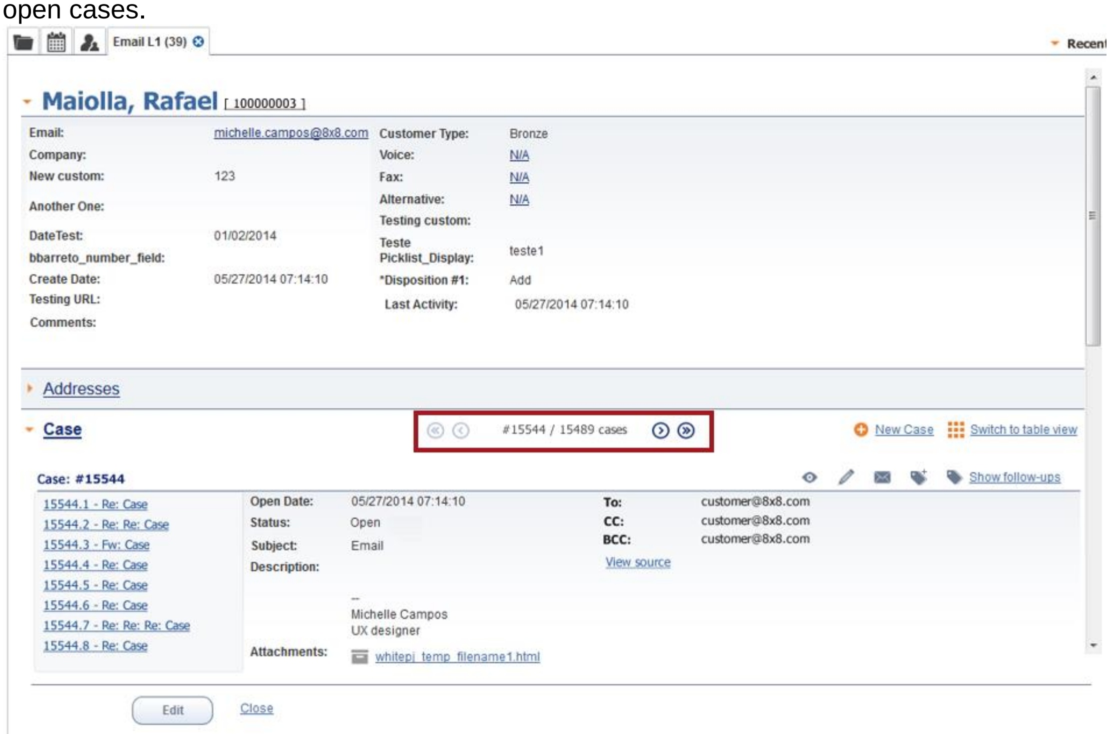
When you open a customer record, you are able to view the customer details such as name and account number, as well as cases, tasks, and the history of changes made to the customer record.

Note: You can configure the order of columns in the result page to arrange them in a particular order. To change the order, select and drag the column to the desired location.

- **Details**: Includes voice, email, company, phone, address, etc. The customer last name, first name, and account number appear as a link in title. Clicking **Back to Customers** takes you back to the customer list.



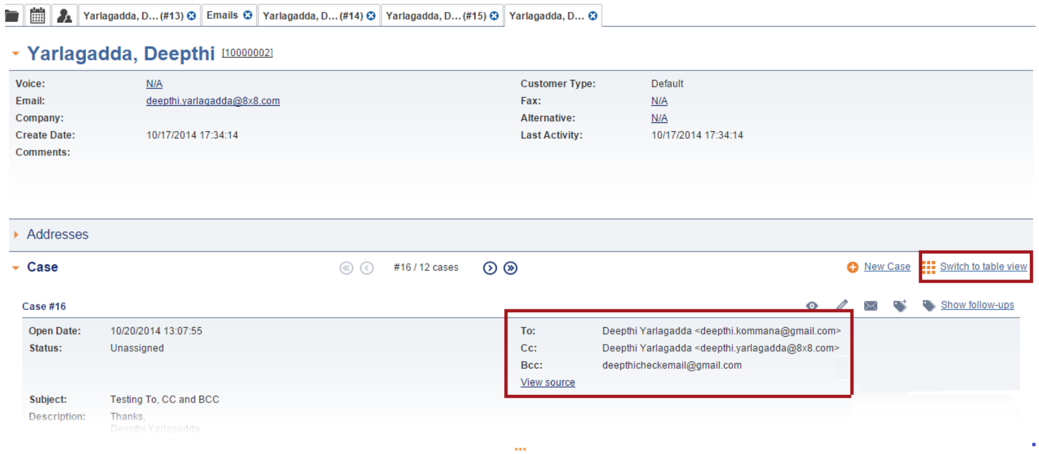
- **Case**: Includes the cases or records of interactions with the customers created during or after an interaction. You can view cases in **Table view** or **Unitary view**. Table view lists all cases associated with the customer in a tabular format. Unitary view shows one case at a time, and can be navigated using the pagination tools. Table view is the default view when you first open cases.



If a case is created as a result of an incoming email through the email channel, you are able to see the To, CC, and BCC fields in the details.

To view the email fields and source of email from the Customers tab:

1. In Agent Console, go to the **Customers** tab.
2. Select a customer, and go to **Case** to see the list of cases.
3. Highlight a case from the list, and select **Switch to unitary view**. The case details display, and information in the To, CC, and BCC fields. Clicking **View source** allows you to see the email protocol routing.



You can see one case at a time. Use the pagination tools to go to other cases.

4. Click to see all content.

- **Task**: Includes tasks such as calls, emails, meetings, chats, or any other type of contact made with a customer.
- **History**: Includes the history of changes made to the customer record.

Create and Edit Case Records

When you process an interaction with an existing customer, you create or edit a case record of the interaction either during or after the interaction. You can create, edit, and save a case record, which the CRM pulls out during the next interaction with the same customer, enabling you to process the case efficiently. Create follow-up records to handle subsequent interactions with the customer regarding the same case. When the customer needs information, you may respond by emailing the case information to them.

The Cases tab allows you to:

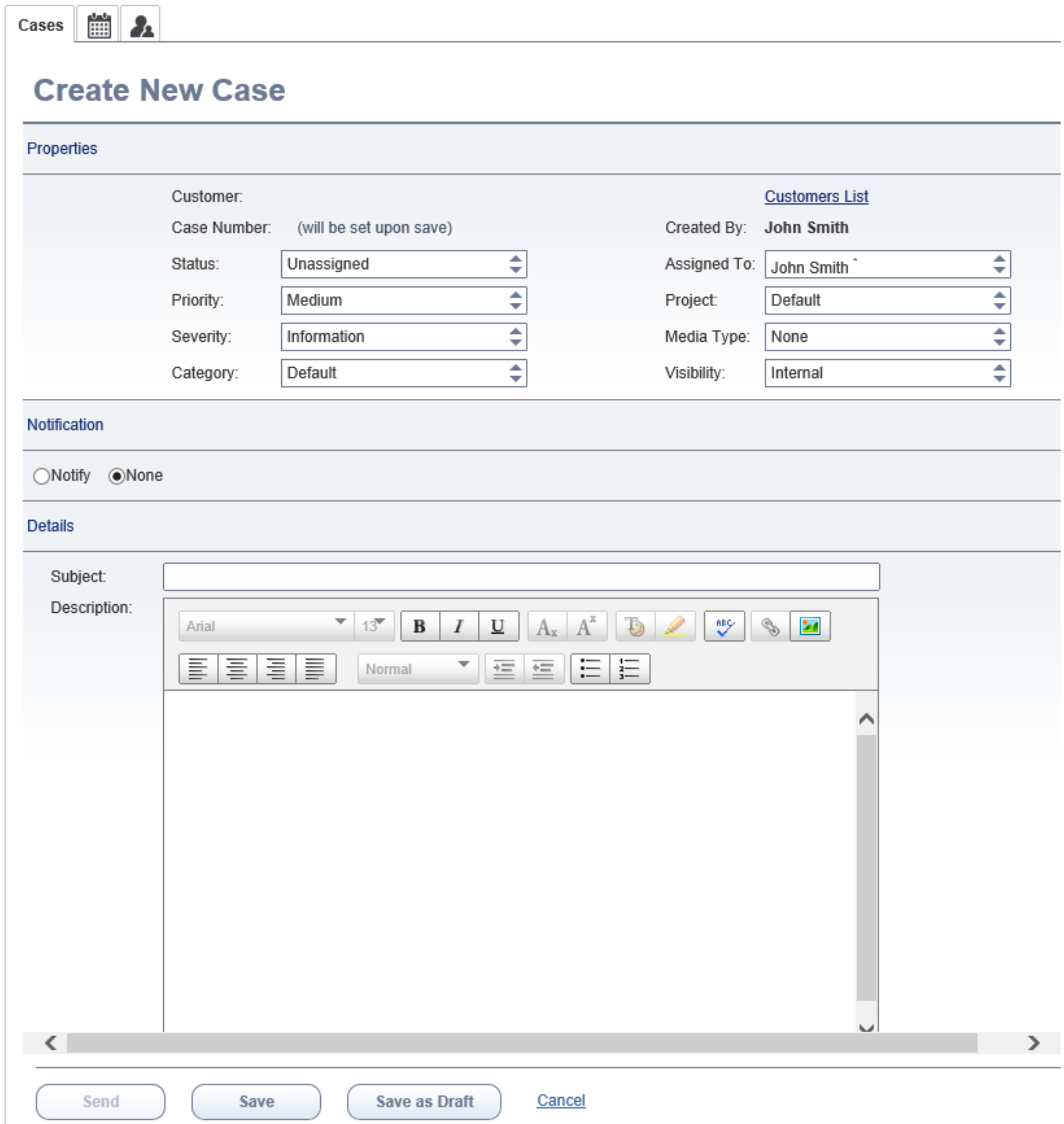
- Create a case record.
- Edit an existing case record.
- Create a follow-up record.
- Send case information notifications.

Best Practice: Edit an existing case record if you wish to re-word a case record or change the case attributes such as Status, Priority, Severity, etc. Create a follow-up record for each subsequent interaction of the same case.

The following describes the use of the default customer fields. Depending on how your contact centre administrator has configured your Local CRM, the customer creation tool may display additional customer fields. You can notify the customer while creating a case.

To create a case record:

1. Go to the customer for whom you are creating a case, and click **New Case**.
   OR
   Click **New Case** in the **Cases** tab.



2. Under **Customer** field, if not populated automatically, select a customer to associate with the case.
3. Change the **Status** to Open to be able to assign the case to any agent.
4. Click **Notify** if you want to send the customer a case notification or email.
   a. Select the **From** address from the drop-down menu, if it fails to populate automatically.

b. Select the **To** address from the list of recipients, if not populated automatically. Select **CC** and **BCC** recipients if needed.

Note: Based on the configuration of your contact centre, the To email addresses may populate automatically, eliminating the need to manually enter the information. You still need to add the CC and BCC addresses either from the available list of recipients or manually.

c. In the **Subject** and **Description** text entry areas, type the subject and message regarding the case if you did not enter this information in the Properties tab.

Note: If HTML support is enabled for CRM, you can create content in the Description field using the CRM rich text editor. For details on using the CRM rich text editor, see Understand Your Rich Text Editor.

d. Select the **Signature** for the email message.

Note: You must set the right values for the Default From and Default Signature fields in your profile to automatically populate the From and Signature fields in the Notification tab.

5. Optionally, insert FAQs or attach files to the case record.
   You can insert FAQs using shortcuts, or by browsing through the FAQ knowledge base. Shortcuts link to the FAQs. For details, see Insert FAQ into Email Responses.

   - To insert an FAQ shortcut, enter the shortcut and click **Insert FAQ**.
   - Click **Browse FAQ** to browse through the FAQ knowledge base, and insert the desired FAQ responses either as full text or links.
   - Attach files by browsing or by dragging files from the local file system.

6. Perform one of the following tasks:

   - Click **Save as Draft** to save a draft of an incomplete case record.
   - Click **Save** to save a completed case record. You can access and edit the case record later.
   - Click **Send** to mail the case record. If the To and From addresses populate automatically, the mail is sent, successfully creating a case record.

     Note: Based on the configuration of your contact centre, the To and From email addresses may populate automatically, eliminating the need to manually enter the information.

     If your contact centre configuration does not allow automatic populating, enter the addresses manually.

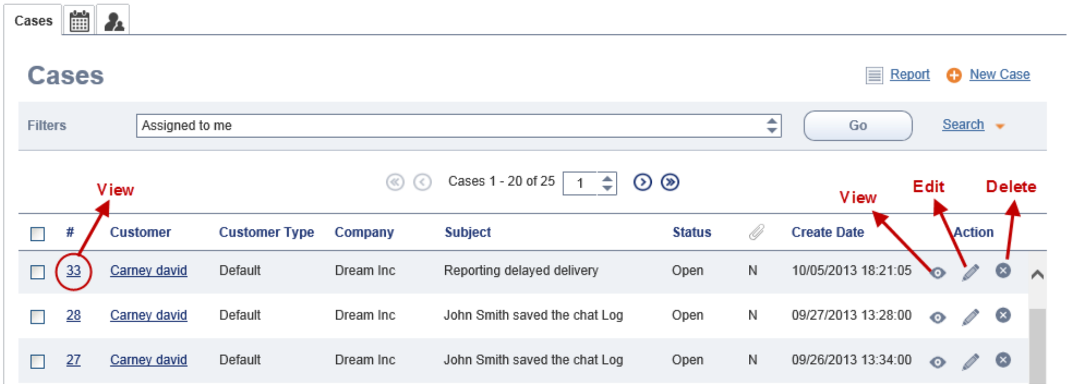
Edit or Delete Case Records

After you create and save a case record, you can edit the information or delete a case record provided that you have the permissions to delete and edit. Contact your Hosted Contact Centre administrator to learn about your permissions.

To edit a case record:

1. Click the **Cases** tab. A list of cases appears.

2. Click one of the actions items available to view, edit, or delete the case record.
   OR
   Select and open a case from the list by clicking the case number. Click **Edit** at the bottom of the page.



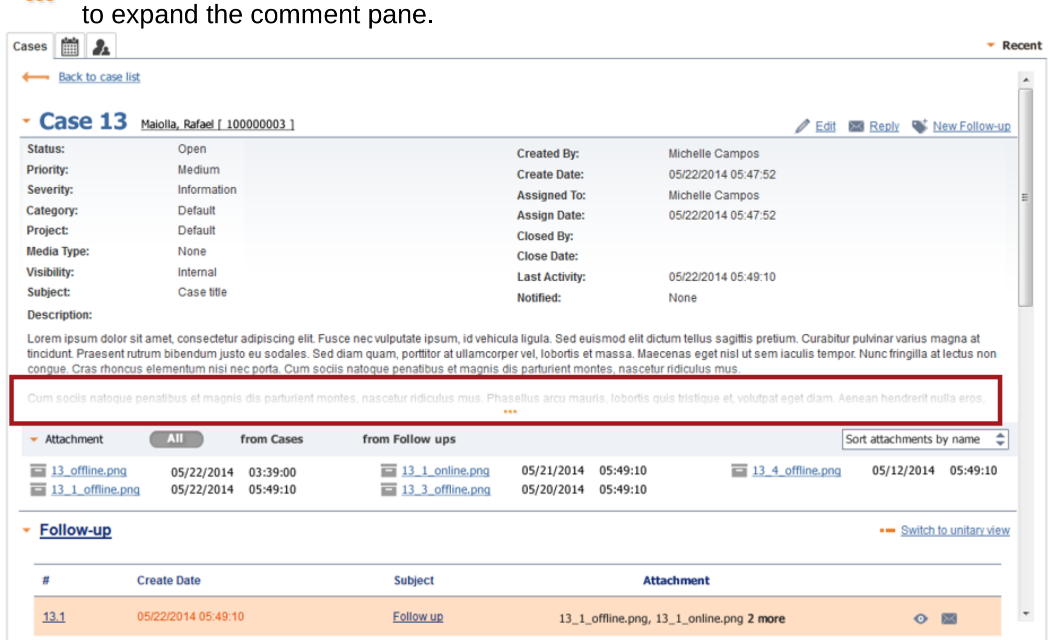
View Case Records

When you open a case, you are able to view details, attachments, follow-ups, and history.

Note: You can configure the order of columns in the result page to arrange them in a particular order. To change the order, select and drag the column to the desired location.

- **Details**: Includes information such as the case ID, customer name, account number, status, the agent who created the case, and case description. To view the entire description, click

  ... to expand the comment pane.



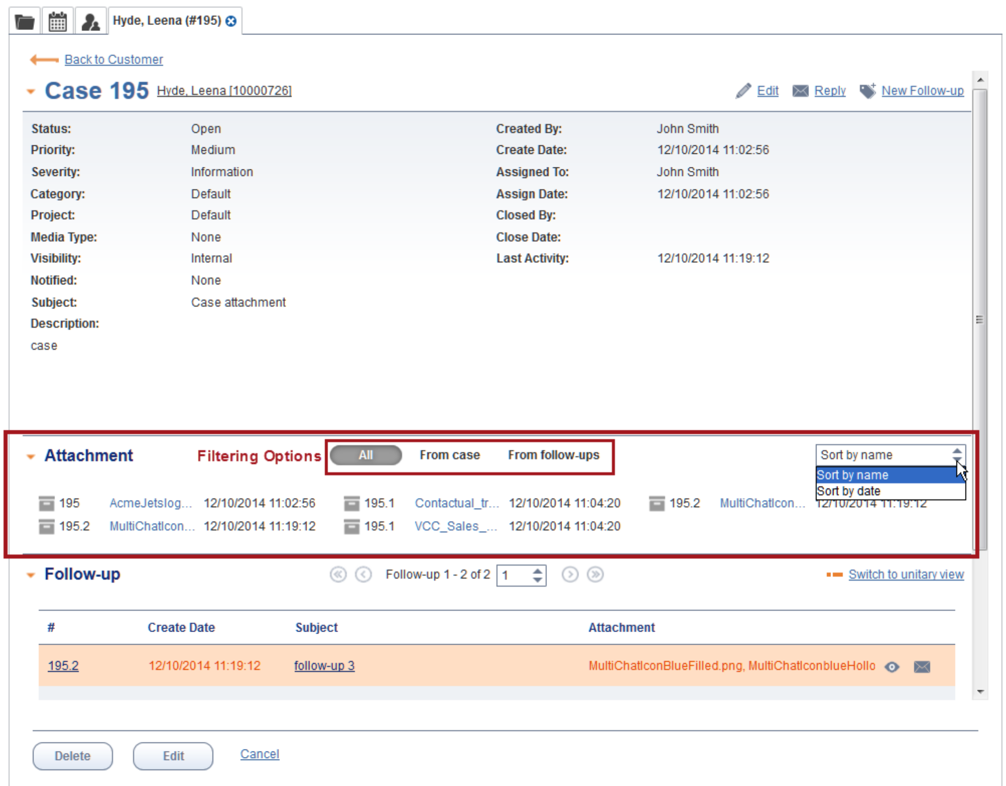
  If a case is created as a result of an incoming email through the email channel, you are able to see the To, CC, and BCC fields in the details.

- **Attachment**: Lists all attachments associated with a case and its follow-up records. You can either sort the attachments by name or date, or filter them by the case or follow-up attachments.

To view and open case attachments:

When downloading CRM attachments, based on the privileges granted to you, you either have the ability to open and save the CRM attachments from emails by clicking the attachments, or are restricted to just saving them locally before opening them. With this restriction, you can exercise caution before opening an attachment, and look out for insecure attachments.

1. In Agent Console, go to the **Cases** tab and open a case.
2. Open **Attachment**.



- Click **From Case** to view only the attachments associated with a case.
- Click **From Follow-ups** to view only the attachments associated with the case follow-ups.
- Click **All** to view all attachments associated with the case and its follow-ups.

3. Click the desired attachment to download the file.

- **Follow-up**: Lists the case follow-ups. A case may have multiple follow-ups before it is resolved. Each communication regarding the case from its creation until it is closed may be recorded as individual follow-up instances.
- **History**: Includes the history of changes made to the case.

Create Follow-up Records

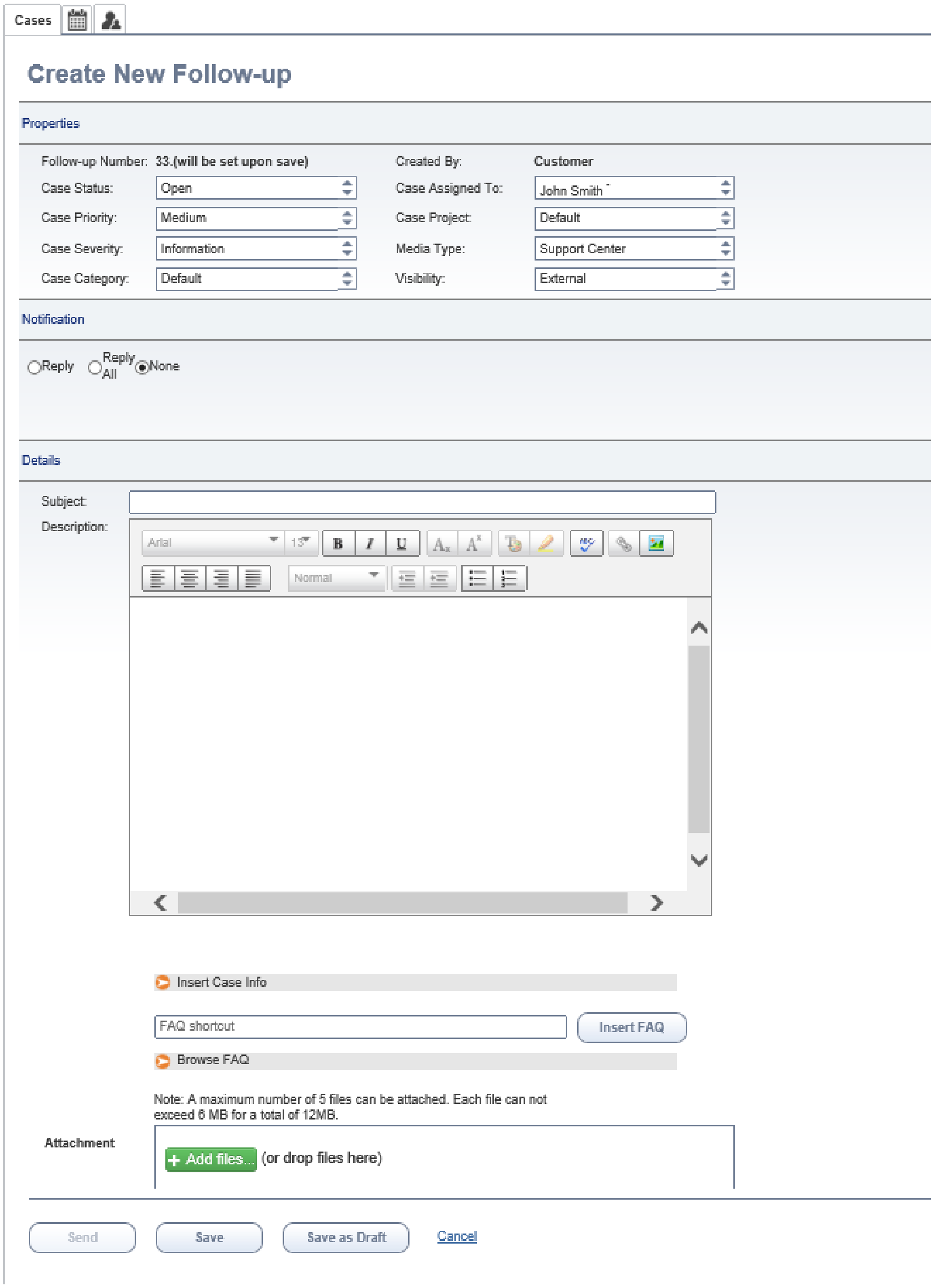
When you process an interaction with an existing customer, you create or edit a case record of the interaction either during or after the interaction. You can create, edit, and save a case record which the CRM pulls out during your next interaction with the same customer, enabling you to process the case efficiently. Create follow-up records to handle subsequent interactions with the customer regarding the same case. When the customer needs information, you may notify them of the follow-up.

The following describes the use of the default follow-up attribute fields and lists. Depending on how your contact centre administrator has configured your Internal CRM, the follow-up creation tool may display non-default follow-up attributes.

Hosted Contact Centre creates follow-up records automatically when you respond to an email interaction. Replying to a case also creates a new follow-up record.

To create a follow-up record:

1. Click the **Cases** tab, and open a case.
2. Click **Reply** or **New Follow-up**.
   The Create New Follow-up page opens.



If your administrator enables HTML support for Local CRM, the CRM rich text editor shows. For details on using the CRM rich text editor, see Understand Your Rich Text Editor. If you are processing an email interaction, you can also use the Email tab in the Control Panel to create a follow-up record. For details about creating a follow-up record while processing an email interaction, see Process Email Interactions.

3. In the **Create New Follow-up** page, update follow-up attributes and add comments.

   Note: **Case Status** must be open before you can assign the case.

4. Optionally, select **Reply** or **Reply All** to notify the customer of the follow-up.

a. Select the **From** address from the drop-down menu, if it fails to populate automatically.

b. Select the **To** address from the list of recipients, if not populated automatically. Select **CC** and **BCC** recipients if needed.

   Note: Based on the configuration of your contact centre, the To email addresses may populate automatically, eliminating the need to manually enter the information. You still need to add the CC and BCC addresses from the available list of recipients, or manually.

c. In the **Subject** and **Description** text entry areas, type the subject and message regarding the case if you did not enter this information in the Properties tab.

   Note: If HTML support is enabled, you can create content in the Description field using the CRM rich text editor. For details on using the CRM rich text editor, see Understand Your Rich Text Editor.

d. Select **Signature** for the email message.

   Note: You must set the right values for the Default **From** and Default Signature fields in your profile to automatically populate the From and Signature fields in the Notification tab.

5. Optionally, insert FAQs or attach files to the follow-up record.
   You can insert FAQs using shortcuts or by browsing through the FAQ knowledge base. Shortcuts link to the FAQs. For details, see Insert FAQ Responses into Emails.

   - To insert an FAQ shortcut, enter the shortcut and click **Insert FAQ**.
   - Click **Browse FAQ** to browse through the FAQ knowledge base, and insert the desired FAQ responses either as full text or links.
   - Attach files by browsing or by dragging files from the local file system.

Perform one of the following tasks:

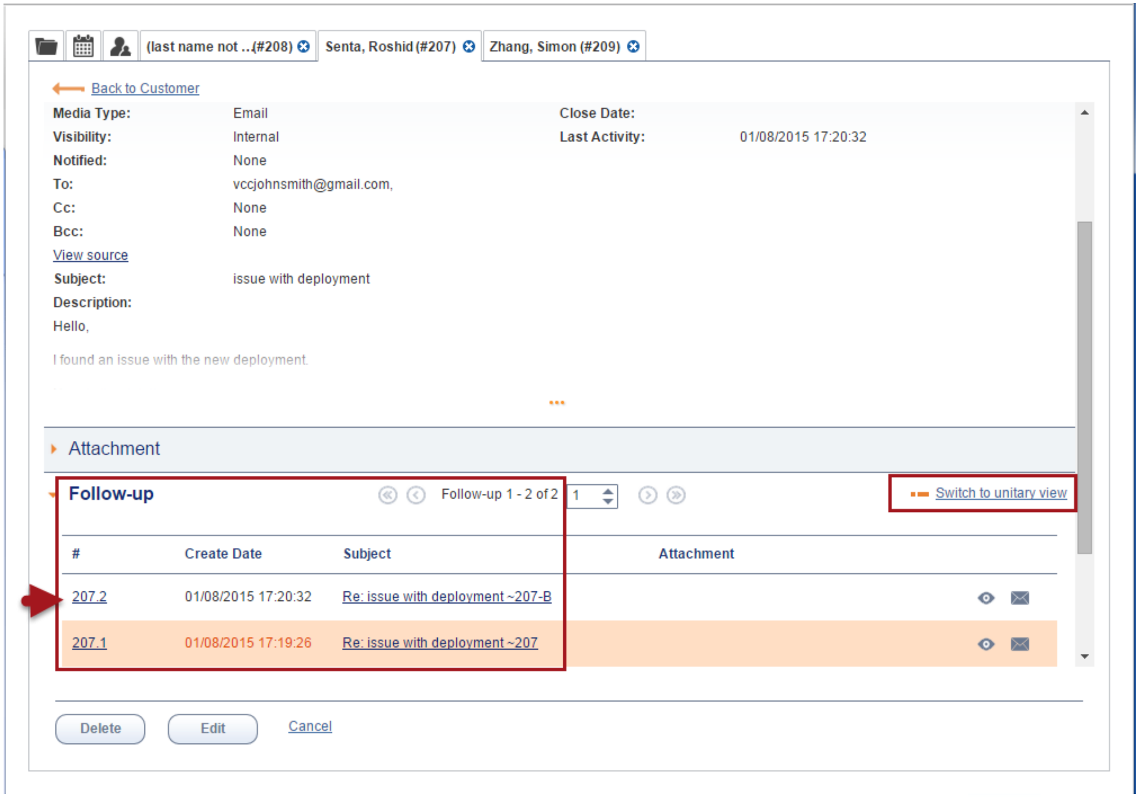
- Click **Save as Draft** to save a draft of an incomplete case record.
- Click **Save** to save a completed case record. You can access and edit the case record later.
- Click **Send** to mail the case record. If the To and From addresses populate automatically, the mail is sent, successfully creating a case record.

  Note: Based on the configuration of your contact centre, the To and From email addresses may populate automatically, eliminating the need to manually enter the information.

  If your contact centre configuration does not allow automatic populating, clicking **Send** takes you to the **Notification** tab.

View Follow-up Records

A list of follow-ups related to each case appears under the case record. You can see the follow-ups listed in the Table View when you open each case record. By default, the most recent follow-up appears at the top of the list. To check the follow-up details, change the Table View to the Unitary View, or click **Switch to unitary view**.



Click on a follow-up link to view the details. To see the complete description, click in the follow-up comment pane.

Note: You cannot edit a follow-up record.

Create and Edit Tasks

A task in Hosted Contact Centre is a call, an email, a meeting, a chat, or any other type of interaction with a customer. A task organizes and helps you track all interactions associated with a customer. The task object serves to create, and manage all tasks you plan to perform or have performed, such as making calls or sending mails. If your contact centre is configured to generate auto logs for interactions, Hosted Contact Centre converts these logs to task records and associates them with relevant cases and customers. For example, a call log or a chat log generated on terminating an interaction is saved as a task.

You can create independent tasks to schedule a phone call to a customer, and set a reminder. A reminder pops up a few minutes before the scheduled call.

Features

- Task fields are customizable. You can add new fields, and edit existing fields.
- Interactions logs for phone and chat are saved as tasks.
- Tasks are automatically created for all campaign calls that are processed.
- Tasks are created for calls scheduled during a campaign.
- An agent creates, views, edits, and searches for tasks.

- An agent can view all tasks assigned to them, and also list all tasks pertaining to a customer.
- The transaction ID is cloned, but a new task ID is generated every time you clone.
- A new task ID is created, and all field values in the task form are cloned except the history, date and time created, and date last modified.
- If an agent tries to delete a parent task, a warning is shown to inform the user that the parent task and its information are being permanently deleted.
- The parent task shows all tasks being cloned from the parent listed under the History tab.
- Only one parent level is allowed for each cloning task.
- The child task shows a link to the original task, and next to the task number.
- If a parent task is deleted, and the child task shows the parent task in the history, but the link to the parent task is removed.
- The agent can see the clone button only if the administrator has enabled the agent to edit and create tasks under User > Edit User > Internal CRM in Configuration Manager.

Create Tasks

You can create a task in multiple ways:

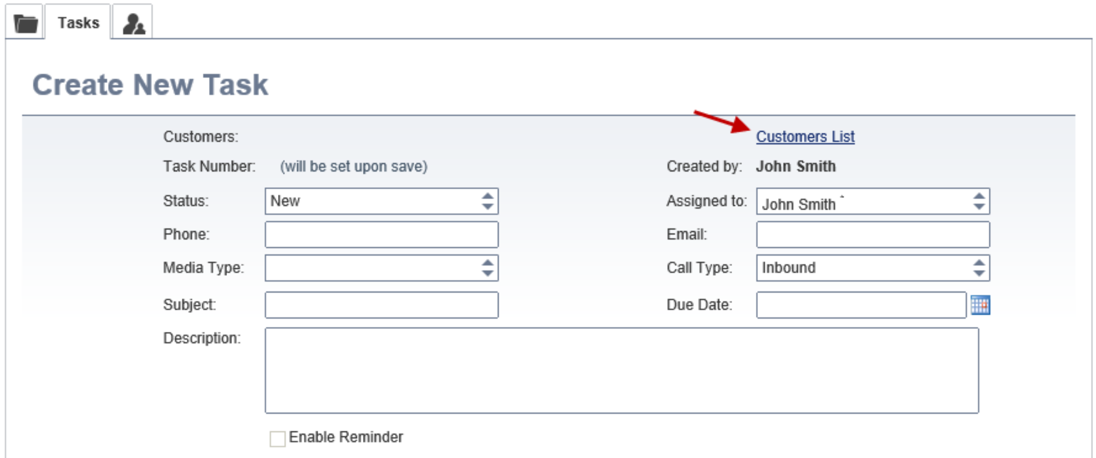
- **Create an independent task**: In the Tasks tab, you can create an independent task, or associate it to a customer.
- **Create a task for a customer**: In the Customers tab, you can open a customer record, and create a new task. The task is automatically associated with that customer.
- **Clone a task**: Replicate tasks with a click on the task form. This way, agents can clone a task, creating a new task ID, and associate each cloned task ID with the same original inbound transaction ID. Example use case:[5]

To create an independent task:

1. Click the **Tasks** tab.
   A list of your open tasks shows by default.

[5] A receptionist at a dental clinic uses tasks to create appointments. Once he creates an appointment for a family member through a task, he can copy the task to create appointments for the rest of the family. Agents can increase their efficiency using the clone feature, eliminating the manual work of entering data, and speeding up the process.

2. Click **New Task**.



Search and open a customer record, and click **Create** under the Task section.

3. Enter the details of the task. The task fields are customizable in your CRM. You may create custom fields, or edit existing fields.

   - **Status**: When you create a task, assign a status to indicate how the task progresses.

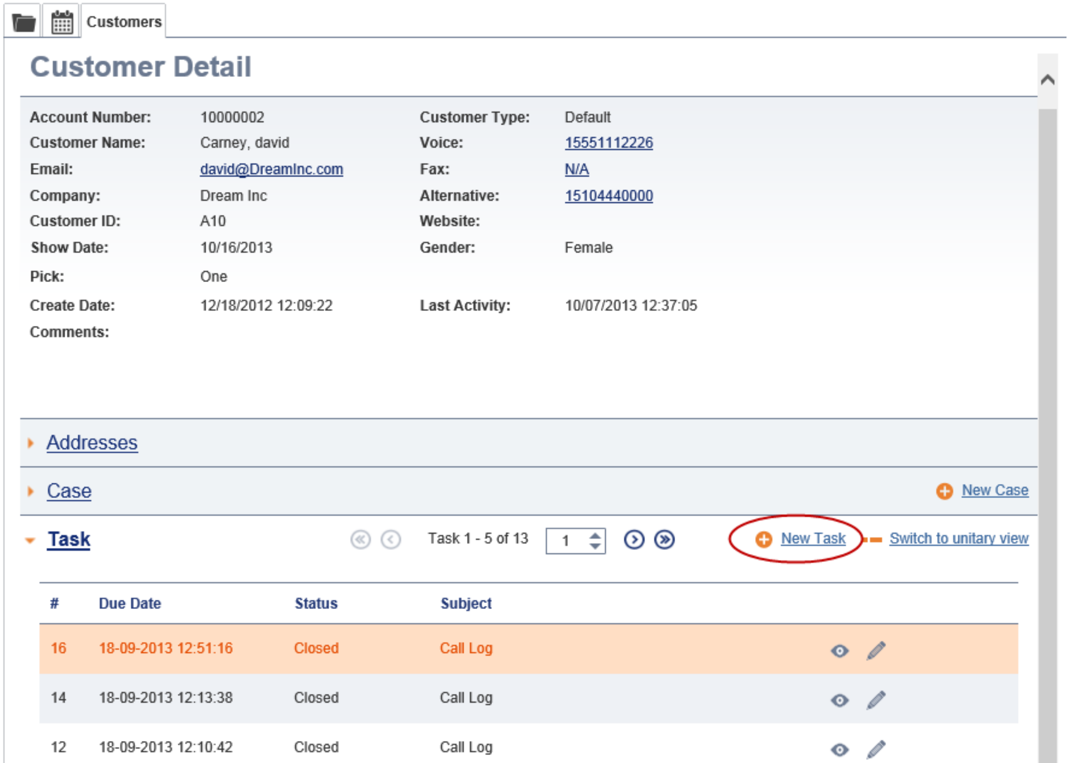
     Note: Pick list values are customizable.

   - **Phone**: Optionally, enter the phone number of the customer.
   - **Media Type**: Refers to the media of a task, such as phone, email, chat, or voicemail.
   - **Due Date**: Select a date to complete the task using the calendar. This creates a reminder. You can enable the reminder option to automatically generate a reminder.
   - **Assigned To**: By default, the task is assigned to the agent who creates it. To assign the task to another user, select a user from the drop-down list. You can assign a task only to a single user.
   - **Email**: Optionally, enter the email address of the contact.
   - **Call Type**: Refers to whether the call is inbound, outbound, or Direct Agent Access.
   - **Subject**: Enter a subject or short description of the task.
   - **Description**: A note describing the task.
   - **Enable Reminder**: Optionally, select the check box to set a reminder on the task. This option is enabled only if you specify a due date.

4. Click **Customers list** to associate it with an existing customer.
5. Click **Save**.
   You have created a task successfully. If you have selected **Enable Reminder** check box when creating the task, a reminder pops up at the specified time before the scheduled call.
6. Click the **Scheduled Call** to view the task details and the associated customer record. The reminder continues to pop up until the task is completed or dismissed.

To create a task for an existing customer:

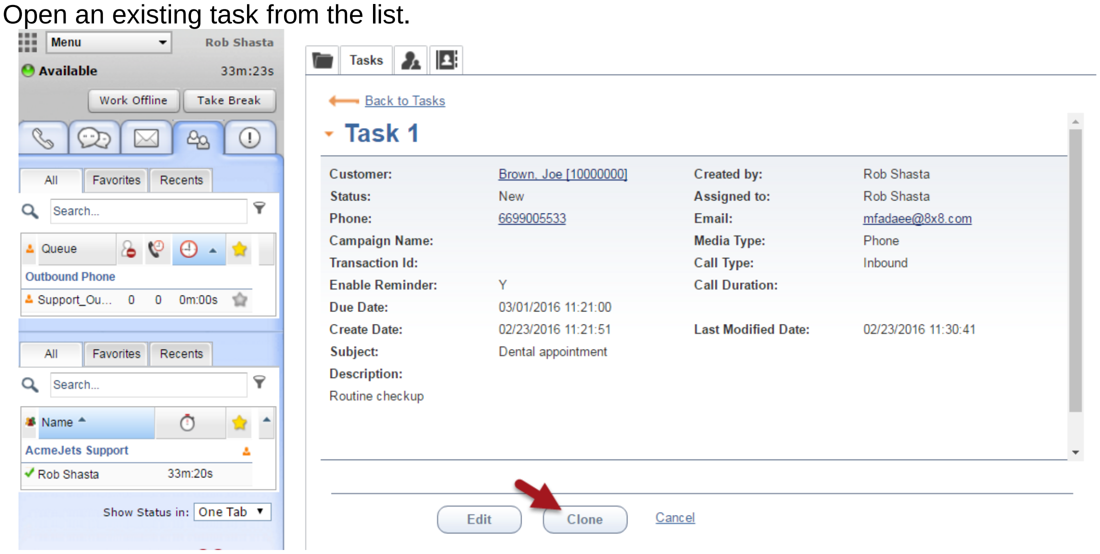
1. Open a customer record, and scroll down to the Task area.
2. Click **New Task**.



3. Enter the desired attributes to the new task.
   Note that the task is associated with the customer.
4. Save the task.

To clone a task:

1. In Agent Console, click the **Tasks** tab.
   A list of your open tasks appears.
2. Open an existing task from the list.



Note: If you wish to create a new task, you need to save it first before being able to clone.

3. Click **Clone**.
   A confirmation window appears.
4. Click **OK** to confirm cloning.
   The page to edit the task opens with the information already populated.
   Note that the task number indicates if it is cloned from another task.
5. Click **Save**.
   The cloned task appears in the list.
   The new task shows the link to the original task.

Note: Deleting a task or a cloned task is available to agents only if they are granted the right privileges. Your confirmation is required to delete a parent task with a cloned child.

Manage Tasks

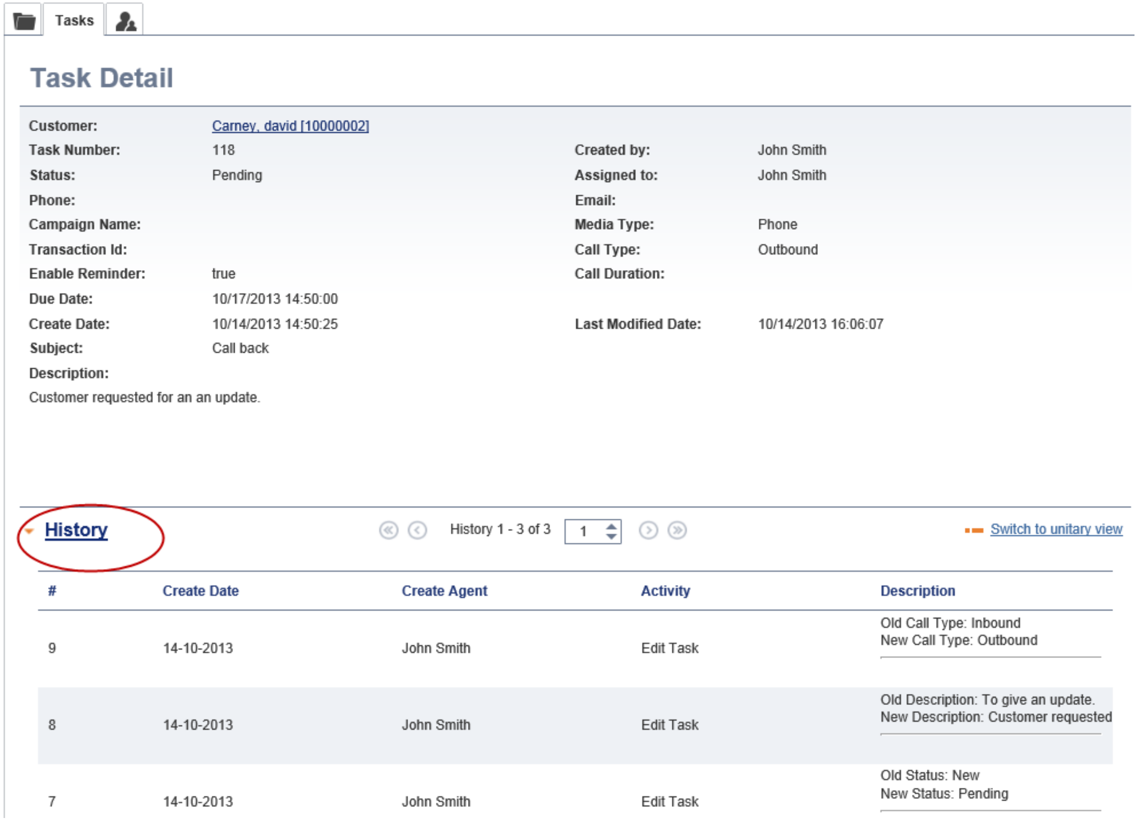
After you create and save a task, you can edit the information or delete a task record, provided that you have the delete and edit permissions. Contact your Hosted Contact Centre administrator to inquire about your permissions.

To edit a task:

1. Click the **Tasks** tab. A list of tasks appears.
2. Click one of the actions items to view, edit, or delete the customer record.
   OR
   Select and open a task record from the list by clicking the task number. Click **Edit** at the bottom of the page.

View Task History

You can view task record details, including the changes a task has gone through since its creation.



List the Tasks of a Customer

You can list all tasks pertaining to a customer record.

To list all tasks:

1. Go to a customer record, and click the triangle next to **Tasks**.
   A list of all tasks associated with the customer record opens.
2. Click any record to view the task details.

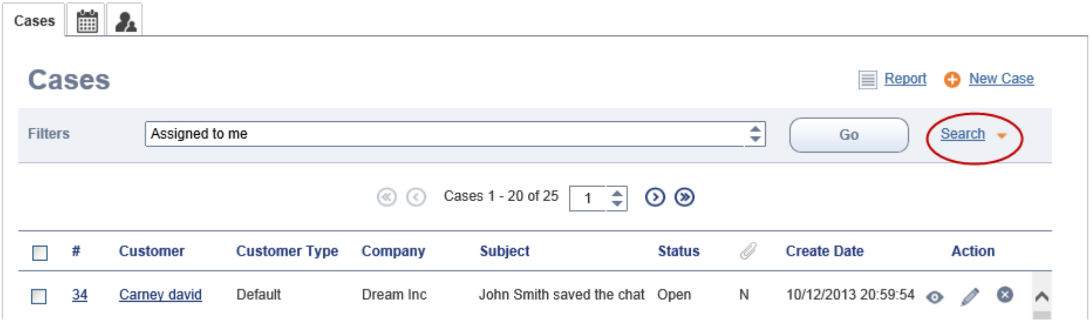
Search CRM Data

The search feature in Agent Console allows you to search for customers, cases, and task records in your CRM based on specific criteria. You can perform a basic search on standard fields, or an advanced search based on any CRM field defined in a record. For example, you can search for a customer by last name or email address in a simple search. You can look for records based on multiple criteria, such as a cases created in the last week in pending status. You can refine your search with a multitude of CRM search operators as described in the following table:

Search Operator	Description	Example
= equals	match the string exactly	Last Name = Hansen
=i equals (ignore case)	match the string exactly (case insensitive)	Last Name = hansen
> greater than	applicable to a numeric field. Search for a value greater than a specified value.	Case Number > 1200
< less than	applicable to a numeric field. Search for a value less than a specified value.	Case Number < 1200
>= greater or equal	applicable to a numeric field. Search for a value greater than or equal to a specified value.	Case Number >= 1200
<= less of equal	applicable to a numeric field. Search for a value greater than or equal to a specified value.	Case Number <= 1200
* contains	Search for a part of a word.	Case Subject * Delayed order
* i contains (ignore case)	Search for a part of a word (case insensitive)	Case Subject * delayed order
! not contains	Search for a record which does not contain a specified string.	Case Subject ! Sales Orders
!i not contains (ignore case)	Search for a record which does not contain a specified string. (case insensitive)	Case Subject !i sales orders
^ starts with	Search for a record which starts with a specified string.	Phone ^ 510
^i starts with (ignore case)	Search for a record which starts with a specified string. (case insensitive)	Phone ^i support
E empty	Search for a record where the field value is empty	Do not Call E
!E not empty	Search for a record where the field value is not empty	Phone !E
> after	Search for a record with a date value after a specified date.	Assign Date > 01/29/2012
< before	Search for a record with a date value before a specified date.	Assign Date < 01/29/2012
>= after (inclusive)	Search for a record with a date value after a specified date including the date.	Assign Date >= 01/29/2012
<= before (inclusive)	Search for a record with a date value after a specified date including the date.	Assign Date <= 01/29/2012

To perform a search for CRM data:

1. Go to the corresponding CRM object tab.



2. Click **Search**.
3. Select your search parameters in the simple search. To perform an advanced search, click **Advanced**. Click **Search** for a customer, case, or task as desired. See more details on searching for customers, cases, and tasks.

Search for Customer Records

The customers are accessed from the Customers tab. By default, the Customers tab lists customers that are assigned to an agent. Agents can also access customer records that are:

- assigned to the agent's group
- created by the agent
- in draft state
- all customer records

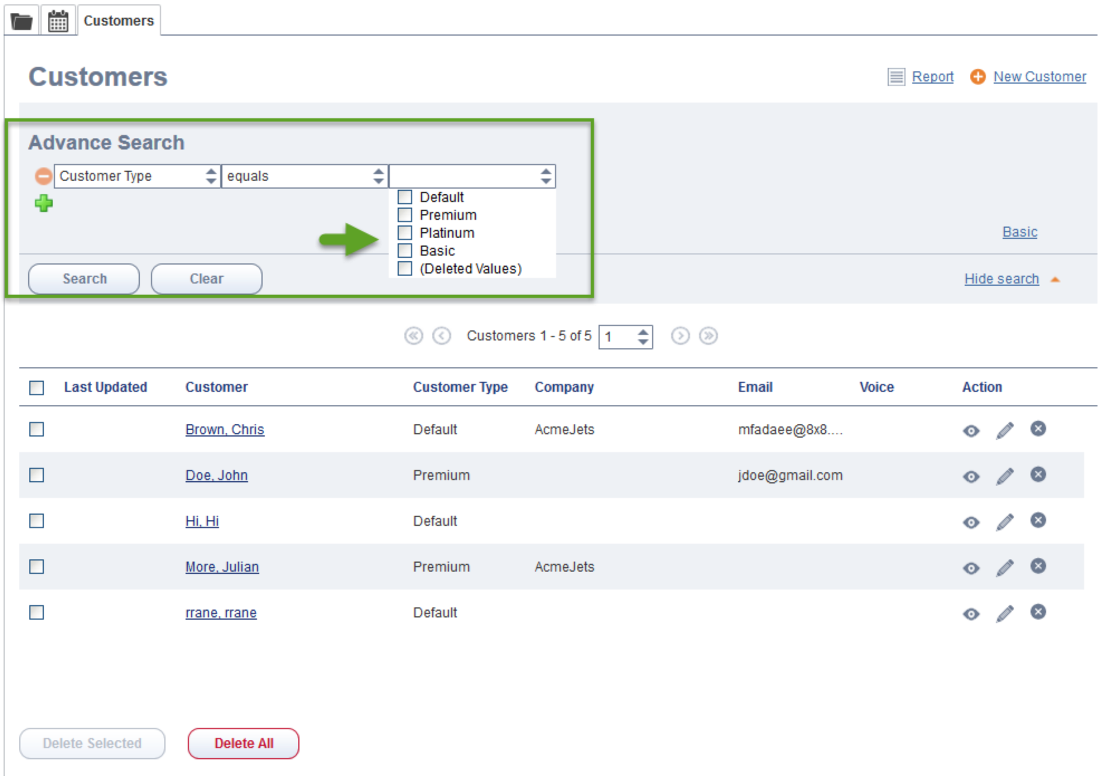
Note: The ability to view, create, edit, and delete customer records is available to you if your administrator grants the necessary privileges.

You can search and retrieve customer records using basic or advanced search.

- **Basic Search**: Allows you to search for customers by last name and/or email address. Click **Search** to retrieve a list of all customers.
  To perform a basic search for customers:
  1. Click the **Customers** tab.
  2. Click **Search**.
     Agent Console displays the basic search interface.
  3. Click the **Search** button to retrieve all customer records.
     OR
     Perform either or both of the following, and click **Search**:
     - Enter a customer Last Name.
     - Enter a customer Email.

     A list of customer records matching the search criteria displays.
- **Advanced Search**: Allows you to search for customers by any field defined in the customer record. You can create nested queries by using the AND logical operator.
  Additionally, you can look for multiple values for a field. For example, to access all customers'

types, you can search for multiple values such as the default, premium, platinum and basic statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** from the simple search window.

Search for Cases

All cases are accessed from the Cases tab. By default, all cases assigned to you are listed. You can also access case records that are:

- assigned to your group
- created by you
- in draft state
- all case records

Note: The ability to view, create, edit, and delete case records is available to you if your administrator grants the necessary privileges.

You can search and retrieve case records by performing a basic or advanced search.

- **Basic Search**: Allows you to search for cases:
  - by case number
  - by case subject
  - created by specific agents or customers

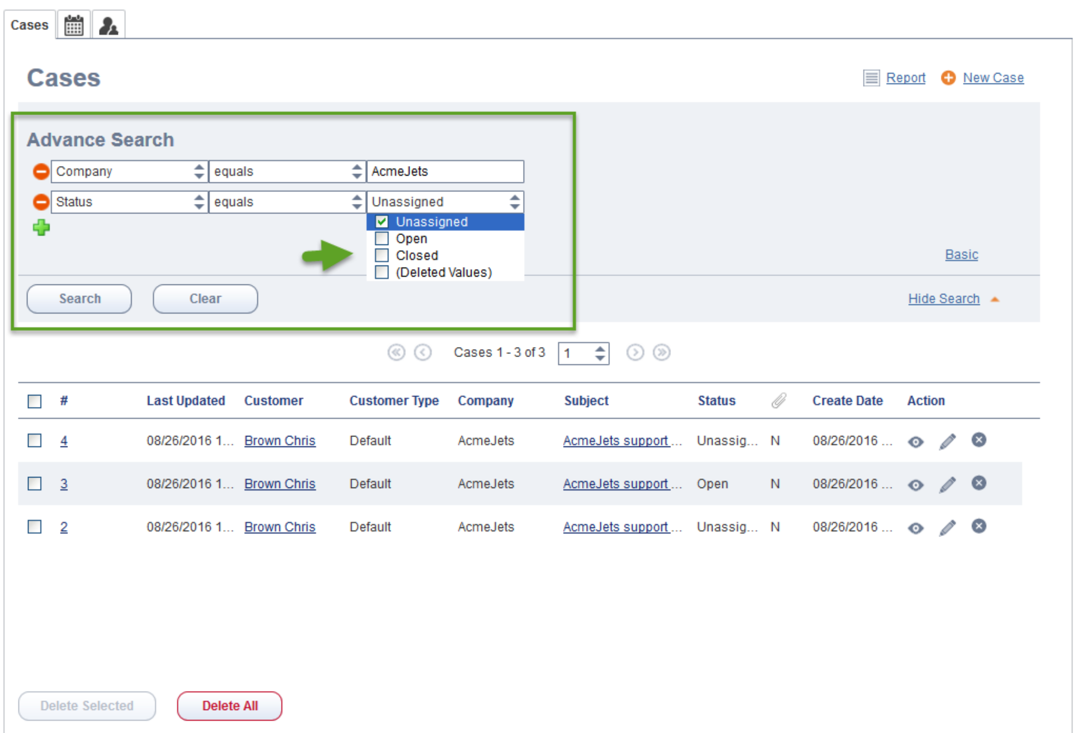
- assigned to specific agents or groups

To perform a basic case search:

1. Go to the **Cases** tab.
2. In the Display Panel under Cases, click **Search**.
   Agent Console displays the basic search interface.
3. Click **Search** to retrieve all cases.
   OR
   Perform any or all of the following, and click **Search**:
   - Enter a case number.
   - Enter a case subject.
   - Select an agent or customer who created a case.
   - Select an agent, or group to retrieve cases assigned to them.

   A list of case records matching the search criteria displays.

- **Advanced Search**: Allows you to search for cases by any field defined in a case record. You can create nested queries by using the AND logical operator.
  Additionally, you can search for multiple values for a field. For example, to access all cases that are pending and in the open status, you can search for multiple values such as the open and pending statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** from the simple search window.

Search for Tasks

All tasks are accessed from the Tasks tab. You can search and retrieve task records by performing basic or advanced search.

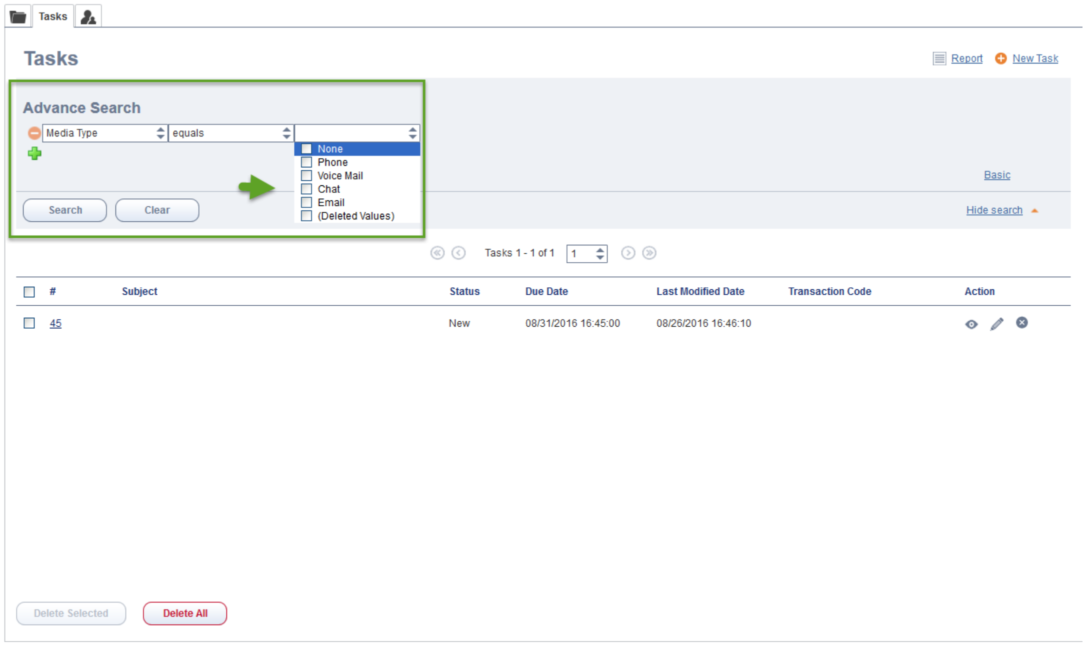
- **Basic Search**: Allows you to search for tasks:
    - by Task Number
    - by Task Subject
    - created by specific agents
    - assigned to specific agents

  To perform a basic search for tasks:

  1. Go to the **Tasks** tab.
  2. In the Display Panel under Tasks, click **Search**.
     Agent Console displays the basic search interface.
  3. Click the **Search** button to retrieve all tasks.
     OR
     Perform any or all of the following, and click **Search**:
     - Enter a task number.
     - Enter a task subject.
     - Select an agent who created a task.
     - Select an agent or group to retrieve tasks assigned to them.

  A list of task records matching the search criteria displays.

- **Advanced Search**: Allows you to search for tasks by any field defined in a task record. You can create nested queries by using the AND logical operator. Additionally, you can look for multiple values for a field. For example, to access all media types, you can search for multiple values such as the phone, chat, email, and voicemail statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** link from the simple search window.

Delete CRM Data

You can delete customer, case, and task records from the Local CRM if your contact centre administrator has granted the necessary permissions. If you do not have the permissions, you cannot delete data.

Before You Begin

Before deleting CRM data, note that:

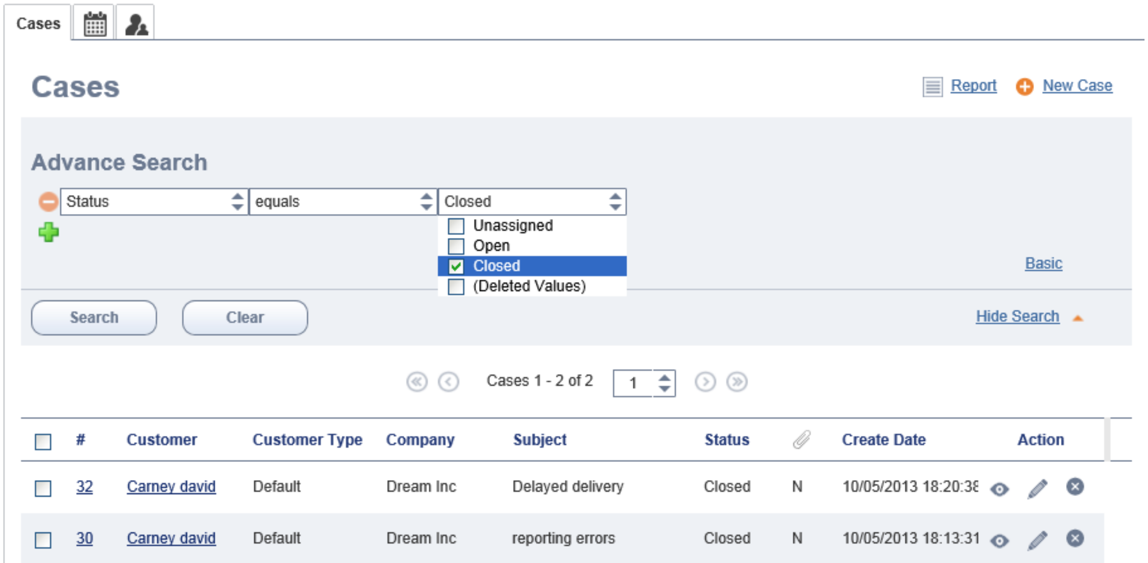
- Deleting a customer record permanently removes the customer information as well as all associated cases, follow-ups, and attachments.
- Deleting a case record permanently removes the case information as well as all associated follow-ups and attachments.
- You cannot restore any portion of deleted CRM records.

To delete CRM data:

1. Log in to Agent Console.
2. From the three CRM tabs (Customers, Cases, Tasks), select the object you wish to delete the data from. Based on your permissions, you can delete customers, cases, or tasks.

Click **Delete** next to the CRM record to delete records individually. You are prompted to confirm.
OR

Click **Basic** or **Advanced Search** to search and retrieve the data records you wish to delete.



3. From the list, select desired records and click **Delete Selected**.
   A message indicates the number of records selected for deletion, and warns that all data associated with the records will be deleted as well.
4. Click **Ok** to proceed.
5. To delete all records:
   a. Click **Delete All**.
      You are prompted to enter your password to prevent accidental deletion.
   b. At the prompt, enter your password to log in to Agent Console.
   c. Click **Delete Now**.

Understand Your Rich Text Editor

If support for HTML email is enabled, agents gain access to a rich text editor in the following pages of Agent Console:

- CRM Create Case
- CRM Edit Case (for non-read-only cases)
- CRM Create Follow-up
- CRM Notification of cases and follow-up records

The rich text editor is Unicode-compatible and fully localized.

The rich text editor in Agent Console allows you to create or edit cases and follow-up records with the following features:

- Rich font properties
- Insert images
- Insert hyperlinks

- Insert HTML-formatted FAQs
- Insert HTML-formatted signatures
- Easy-to-use spell checker

Menu Elements of the Rich Text Editor

The rich text editor in the Hosted Contact Centre CRM lets you create or edit cases, and follow-up records with varying indent options, font types, font sizes, font styles, paragraph styles, and lists. The following table lists the name and role of each menu element in the rich text editor:

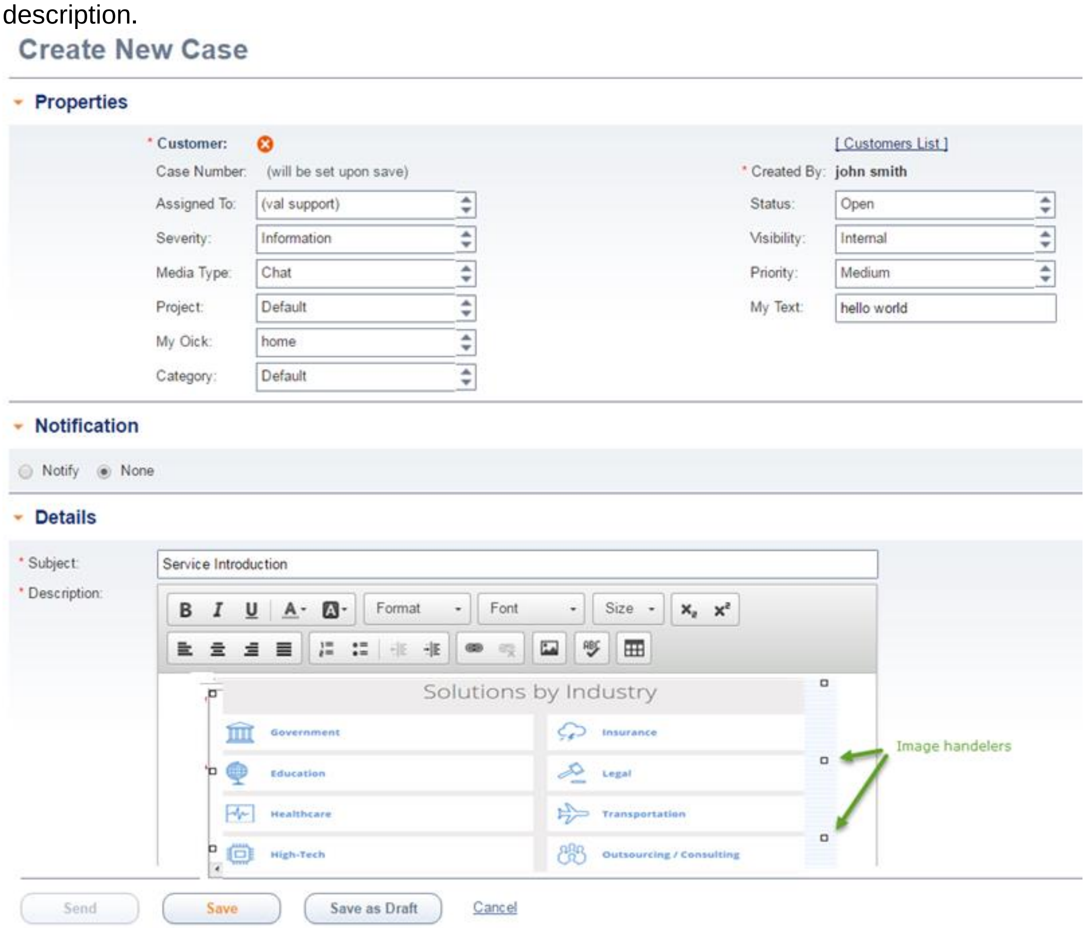
Element Name	Action	Values
Font Name	Set the text font family.	Arial (Default) **Arial Black** Comic Sans MS Courier New Lucida Console Tahoma Times New Roman Trebuchet MS Verdana
Font Size	Set the text font size.	8, 9, 10, 11, 12, 13 (Default), 14, 16, 18, 24, 36
Font Style: Bold	Set the font boldface attribute.	
font Style: Italic	Set the font italic type.	
Font Style - Underlined	Underline the selected text.	
Font Style: Subscript	Turn the selected text into a subscript.	
Font Style: Superscript	Turn the selected text into a superscript.	
Font Style: Front color	Set the font front color.	
Font Style: Background color	Set the font background color.	
Insert Item: HTML Link	Insert an HTML link.	URL to a web page
Insert Item: Image	Insert an image.	URL to a web image
Indentation	Position the text in the editor.	Left, Centre, Right, Justify
Paragraph Style	Set a paragraph style to the selected text.	Normal (default) Header 1 Header 2 Header 3 Header 4 Header 5 Header 6

Insert Images in Case Description

The CRM rich text editor enables you to insert images while creating cases and follow-up records. In the Description field, you can choose to insert an image by placing the cursor in the desired location.

To insert an image in Case Description:

1. From the **Cases** tab, click **New Case** or new follow-up.
2. Enter the **Subject** and **Description**.
3. In the **Description** field, place the cursor where you want to insert an image.
4. Click  from the menu. You may be prompted to allow scripted windows by your browser.
5. Click where instructed, and then click **Temporarily Allow Scripted Windows** in the contextual menu.
6. Click  again. A dialog box opens, prompting for a valid image URL.
7. Enter a valid URL, and click **OK**. The image at the specified URL gets inserted in the description.

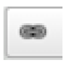
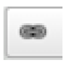


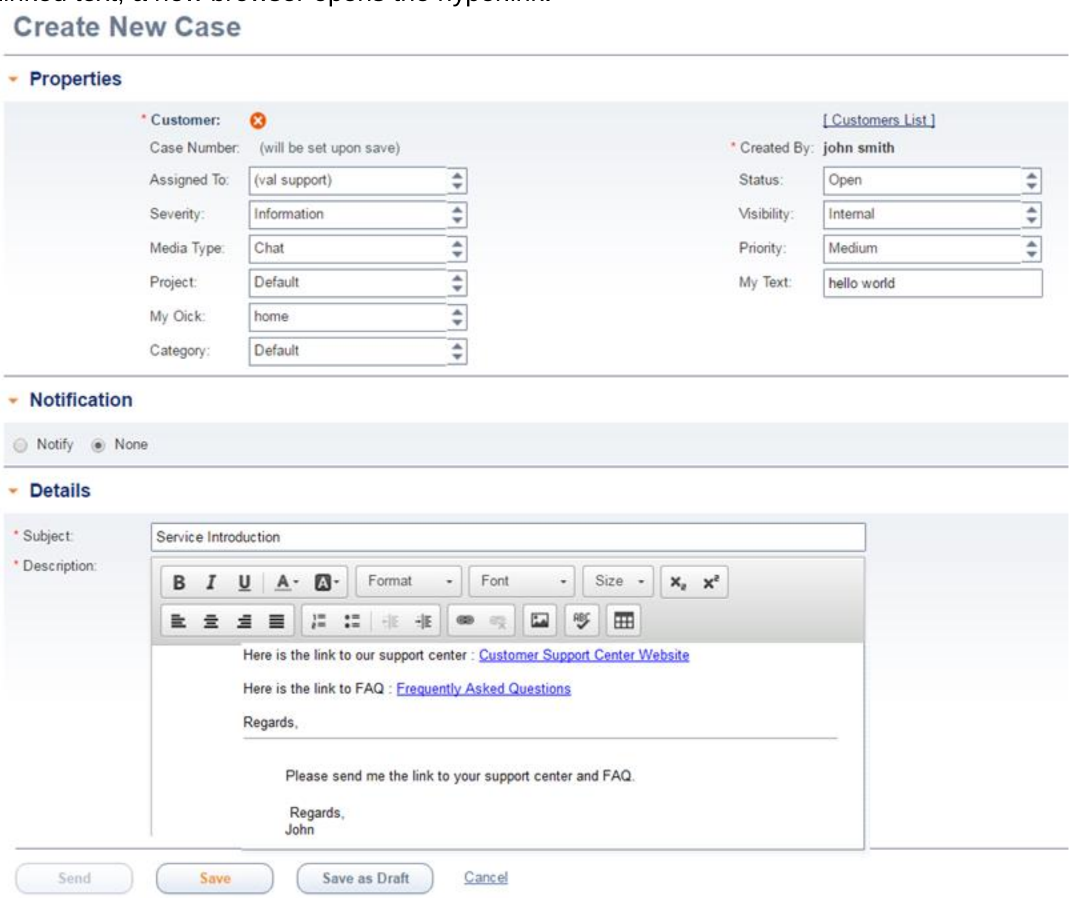
Note: You can resize images in the editor by clicking and dragging the image handlers.

Insert Hyperlinks in Case Description

The CRM rich text editor enables you to insert hyperlinks while creating cases and follow-up records. In the Description field, you can choose to insert hyperlinks by selecting a text string and linking it to a valid URL. When you click on the linked text, the browser opens the hyperlink.

To insert a hyperlink:

1. From the **Cases** tab, click **New Case** or new follow-up.
2. Enter the **Subject** and **Description**.
3. In the **Description** field, select the text to be displayed as the hyperlink.
4. Click  from the menu. You may be prompted to allow scripted windows by your browser.
5. Click where instructed and then click **Temporarily Allow Scripted Windows** in the contextual menu.
6. Click  again. A dialog box opens, prompting for a valid image URL.
7. Enter a valid URL, and click **OK**. The link gets inserted in the description. If you click the linked text, a new browser opens the hyperlink.



Insert FAQs

You can create HTML-formatted FAQs to send to customers. If your contact centre has prepared answers for frequently asked questions (FAQs), and those answers include shortcut definitions, you can use those shortcuts to quickly insert the prepared answers into chat responses, email responses, and email notifications while creating cases and follow-up records.
To insert an FAQ from Cases tab:

1. Go to the **Cases** tab.
2. Click **New Case** or new follow-up.
3. Place your cursor in the **Description** field where you wish to insert the FAQ.
4. Enter an **FAQ shortcut** in the box or click **Browse FAQ**.
5. Search and find the related FAQ, then click **Insert FAQ**.
6. Click **Send**, **Save** or **Save as Draft**.

To insert an FAQ from Chat window:

1. During an active chat with the customer, enter an **FAQ shortcut** in the box.
   OR
   Click **FAQ>>** to search for the related FAQ.
2. Click **Insert FAQ**.
   The FAQ content gets inserted in the response.

Insert Signatures in Case Description

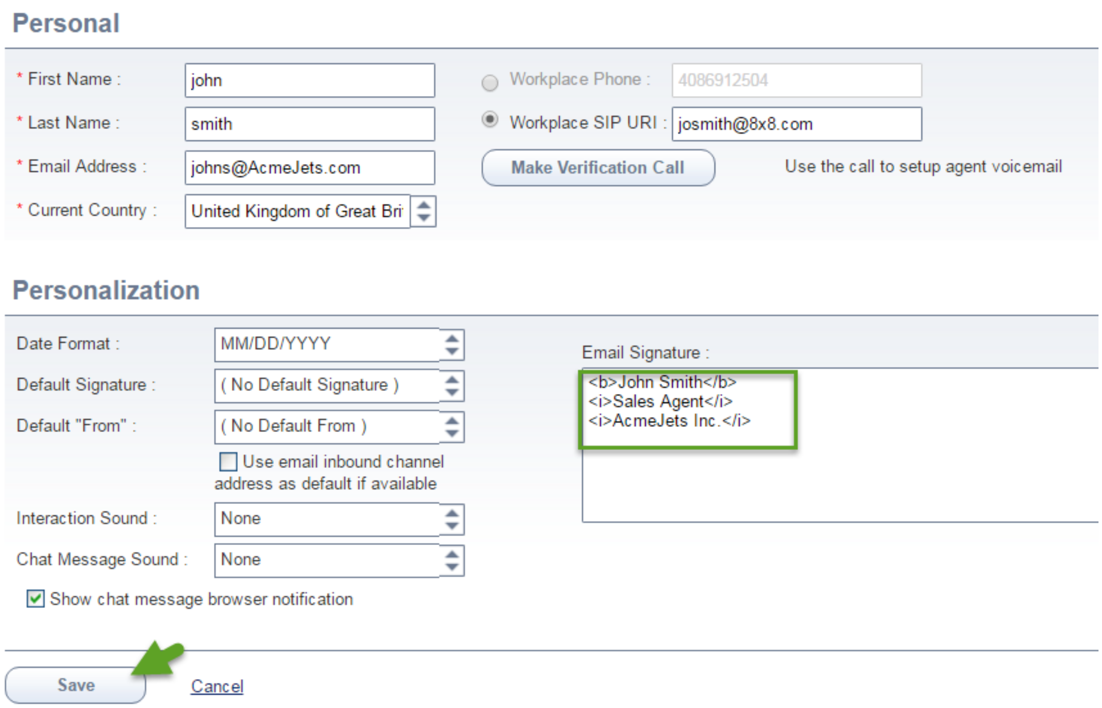
You can create elaborate HTML-formatted signatures to be rendered in the email notifications sent to customers by creating a signature in your profile, saving it, and inserting in the Description field of notification emails.

To create a signature:

1. Go to **Menu > Profile** in the Control Panel.
2. Under **Personalization**, create a signature using HTML tags.

   To create HTML tags you need to type a command before and after each line. Refer to the following table for most common examples:

Command	Formatting Action
... 	Bold Text
<i> ... </i>	Italic Text
<u> ... </u>	Underline Text
^{...}	Superscript - Smaller text placed below normal text
_{...}	Subscript - Smaller text placed below normal text
...	Small - Fineprint size text



3. Click **Save**.

To insert a signature in Case description:

1. Click to open or Edit a case or follow-up.
2. Under **Details**, place the cursor in the **Description** field where you wish to insert the signature.
3. Click **Insert Signature**.
   Your HTML formatted signature gets inserted in the email content.

Check Spelling in Case Description

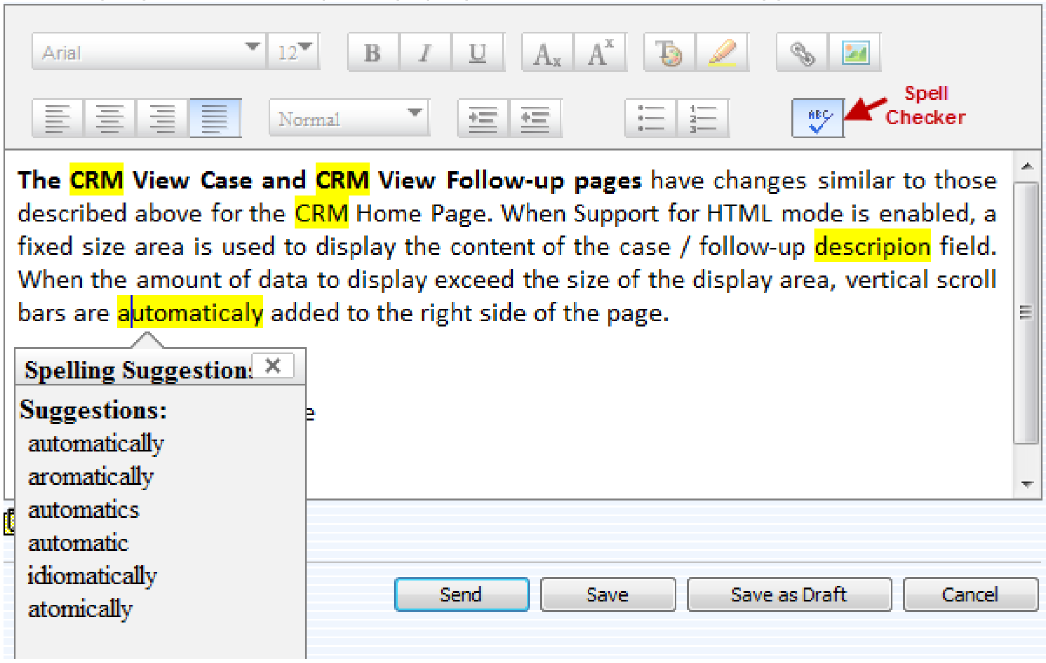
The spell checker in the rich text editor scans and flags the words that may be spelled incorrectly. The spell checker highlights all unknown words. You can replace a highlighted word with a suggestion, or ignore it.

Note: You do not have the option to ignore a suggestion in the context menu. You can simply ignore the words by not clicking on them.

To spell check your content in the Case Description:

1. Click  to turn on the spell checking mode, and turn off text editing or text formatting mode.
   The spell checker highlights all unknown words in yellow.

2. Click a highlighted word to open a pop-up window with a list of suggested words.



3. Replace the word with a suggestion, or ignore the word.

4. When all the spell checking is done, click  to turn off the spell checking mode and return to the normal editing mode.

Create CRM Reports

Each agent can use their Agent Console account to create and save CRM reports that summarize their customer and case activity.

CRM reports can be viewed in a browser window. If your computer has Microsoft Excel installed, you can generate a report as an Excel spreadsheet.

Refer to the following information on creating CRM reports:

- Create CRM Customer Reports
- Create CRM Case Reports
- Create CRM Task Reports

Create CRM Customer Reports

Hosted Contact Centre provides you the ability to create custom reports to extract desired customer data.

To create a CRM Customer Report:

1. Go to the **Customers** tab.

2. In the header area, click **Report**.
   Agent Console displays the Customer Reports page.

3. In the **Customer Reports** page, click **New Report**.

   Agent Console walks you through the three-step New Report wizard.
   If your contact centre administrator has added custom fields to your Local CRM, the custom fields appear in the list of fields.

4. In **Step 1** of the New Report wizard:

   a. In the **Report Title** text entry area, enter the name of the report.

   b. Select a vertical or horizontal layout.

   c. In the **Fields to Include** area, select the fields to be included in the report.

   d. Click **Next**.
   Agent Console displays the next step in the wizard.

5. In **Step 2** of the New Report wizard, for each customer field you chose in Step 1, create optional filtering statements.

   a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.

   b. Click **Next**.
   Agent Console displays the next step in the wizard.

6. In **Step 3** of the New Report wizard, perform the following:

   - Specify a company from the existing list of customer base by clicking **Search**.
   - Choose the primary and secondary report fields Agent Console uses to order the data contained in the customer report, and choose the sort order of the two fields.

7. Produce and save the report. Perform one of the following:

   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To save the report configuration and run the report, click **Save and Run**.
   - If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
     After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

Create CRM Case Reports

A CRM case report provides both customer and case information. The customer-related fields can be used to filter report data, and appear in the Case, Follow-Up, and Attached fields.

Note: The Description field displays only the first 256 characters on reports.

Hosted Contact Centre provides three preset reports by default. You cannot edit these reports, but you can create a new report.

- Internal Case Report

- Supervisor Case Report
- Management Case Report

To run a default CRM Case Report:

1. Go to the **Cases** tab.
2. In the header area, click **Report**.
   Agent Console displays the **Case Reports** page.
   The Case Reports list contains three default case reports:
   - Internal Case Report
   - Supervisor Case Report
   - Management Case Report
3. To run one of the default reports, select a date range and click **Run** next to the desired default report. If you want to create your own report, follow the steps below.

To create a new CRM Case Report:

1. In the **Case Reports** page, click **New Report**.

   Agent Console walks you through the three-step New Report wizard.
   If your contact centre administrator has added custom fields to your Internal CRM, the custom fields appear in the list of fields.
2. In **Step 1** of the New Report wizard:
   a. In the **Report Title** text entry area, type the name of the report.
   b. Select a vertical or horizontal layout.
   c. In the **Fields to Include** area, select the fields to be included in the report.
   d. Click **Next**.
   Agent Console displays the next step in the wizard.
3. In **Step 2** of the New Report wizard, for each customer and case field you chose in Step 1, create optional filtering statements.
   a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.
   b. Click **Next**.
   Agent Console displays the next step in the wizard.
4. In **Step 3** of the New Report wizard, perform the following:
   - Specify the date range for the report.
   - Choose the primary and secondary report fields Agent Console uses to order the data contained in the case report, then choose the sort order of the two fields.
5. Produce and save the report. Perform one of the following:

- To save the report configuration without running the report, click **Save**.
- To run the report without saving the report configuration, click **Run**.
- To save the report configuration and run the report, click **Save and Run**.
- If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
  After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

Create CRM Task Reports

You can extract specific task information by generating customized task reports. Agent Console allows you to create a custom task report in just three simple steps using a wizard. The reporting wizard allows you to select the specific data you wish to report on. For example, you can generate a report to summarize the tasks generated in a particular month.

Generated on 01/04/2013 10:12:00 by John Smith.
CRM reports are currently limited to 65,000 rows of data. If your report would return more than that, consider splitting it into multiple smaller reports using date ranges or other limiting criteria

TAsksListJan2012

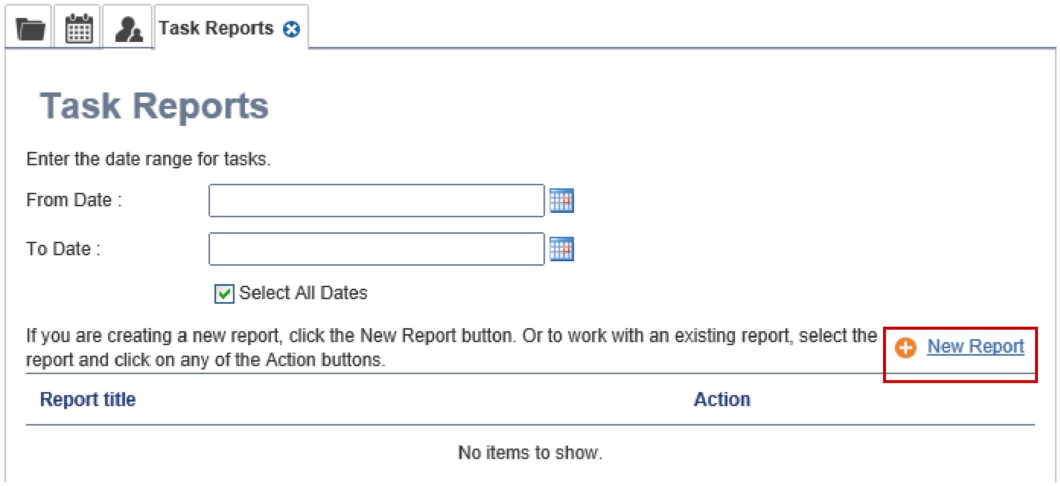
Dates: From: 01/02/2012 **To:** 01/31/2013 **Sorted by:** Account Number ASCENDING

Customer Fields			Task Fields						
Account Number	**First Name**	**Last Name**	**Number**	**Status**	**Call Type**	**Media Type**	**Subject**	**Create Date**	**Last Modi**
10000019	Robert	Hansen	481	Closed	Outbound	Phone		01/27/2012 15:34:21	01/29/201
10000023	Scott	Perez	321	Closed	Outgoing	Phone	call log	01/10/2012 15:09:28	01/10/201
10000023	Scott	Perez	384	Closed	Outgoing	Phone	call log	01/10/2012 23:05:36	01/10/201
10000023	Scott	Perez	341	Closed	Outgoing	Phone	call log	01/10/2012 19:06:39	01/10/201
10000023	Scott	Perez	381	Closed	Outgoing	Phone	call log	01/10/2012 23:02:12	01/10/201
10000023	Scott	Perez	421	Closed	Outgoing	Phone	call log	01/11/2012 12:01:24	01/11/201
10000023	Scott	Perez	441	Closed	Outgoing	Phone	call log	01/11/2012 15:38:11	01/11/201
10000023	Scott	Perez	361	Closed	Outgoing	Phone	call log	01/10/2012 22:27:33	01/10/201
10000024	Erick	Diaz	283	Closed	Outgoing	Email	Send an email	01/04/2012 12:56:54	01/12/201
10000024	Erick	Diaz	401	Closed	Outgoing	Phone	call log	01/11/2012 10:49:34	01/11/201
10000024	Erick	Diaz	362	Closed	Outgoing	Phone	call log	01/10/2012 22:28:50	01/10/201
10000024	Erick	Diaz	322	Closed	Outgoing	Phone	call log	01/10/2012 15:10:25	01/10/201
10000024	Erick	Diaz	385	Closed	Outgoing	Phone	call log	01/10/2012 23:06:09	01/10/201
10000024	Erick	Diaz	301	Closed	Outgoing	Phone	call log	01/10/2012 13:40:02	01/10/201
10000024	Erick	Diaz	382	Closed	Outgoing	Phone	call log	01/10/2012 23:02:42	01/10/201
10000024	Erick	Diaz	422	Closed	Outgoing	Phone	call log	01/11/2012 12:01:30	01/11/201
10000027	Jennifer	Kazemi	363	Closed	Outgoing	Phone	call log	01/10/2012 22:32:28	01/10/201

To generate a report for tasks:

1. Go to the **Tasks** tab.
2. in the header area, click **Report**.
   Agent Console displays the Task Reports page.

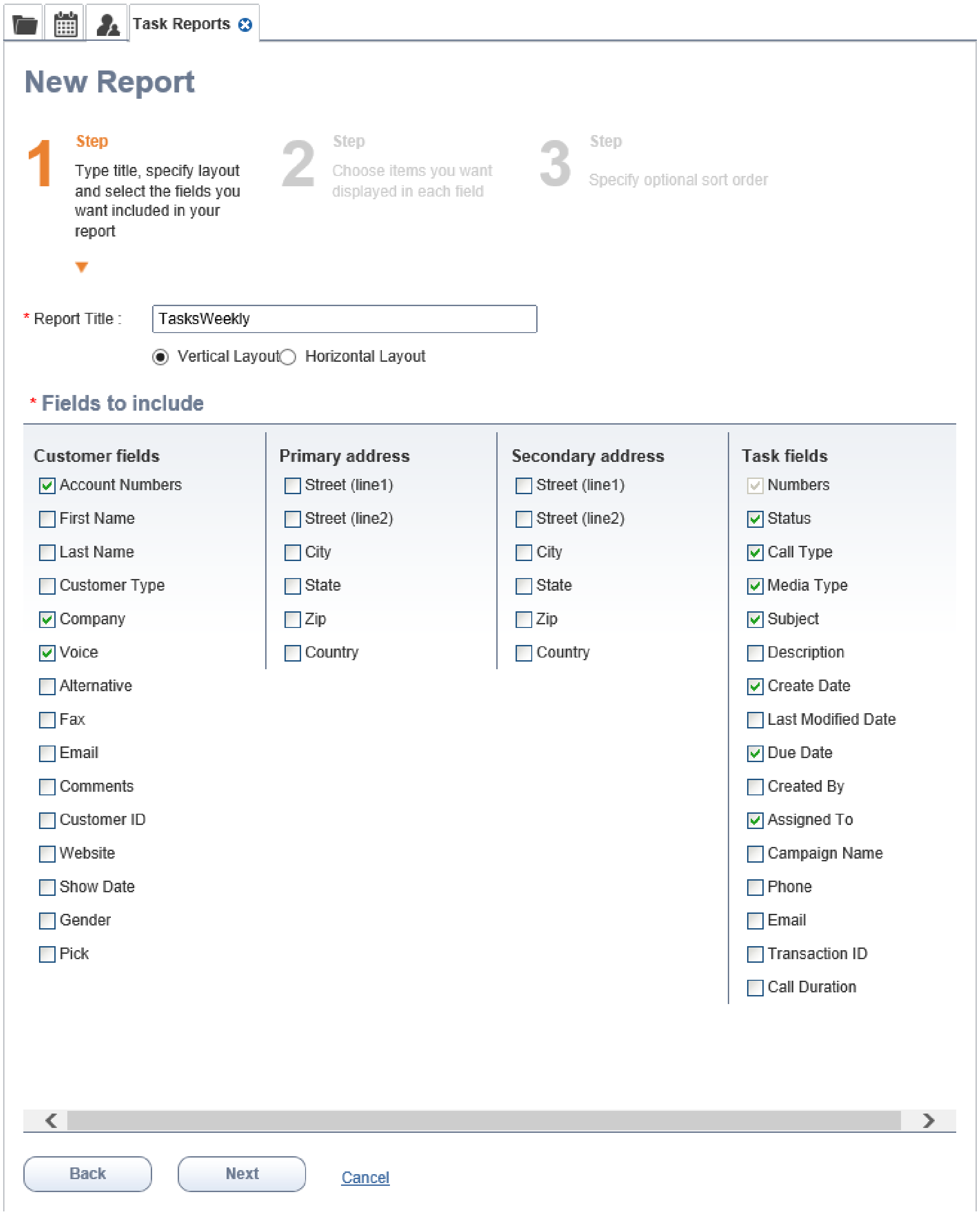
3. in the **Task Reports** page, click **New Report**.



Agent Console walks you through the three-step New Report wizard.
If your contact centre administrator has added custom fields to your Local CRM, the custom fields appear in the list of fields.

Note: To edit an existing report, select the report from the drop-down list of **Task Reports**, and click **Edit**.

4. In **Step 1** of the New Report wizard:



a. In the **Report Title** text entry area, type the name of the report.

b. Select a vertical or horizontal layout.

c. In the **Fields to Include** area, select the fields to be included in the report.

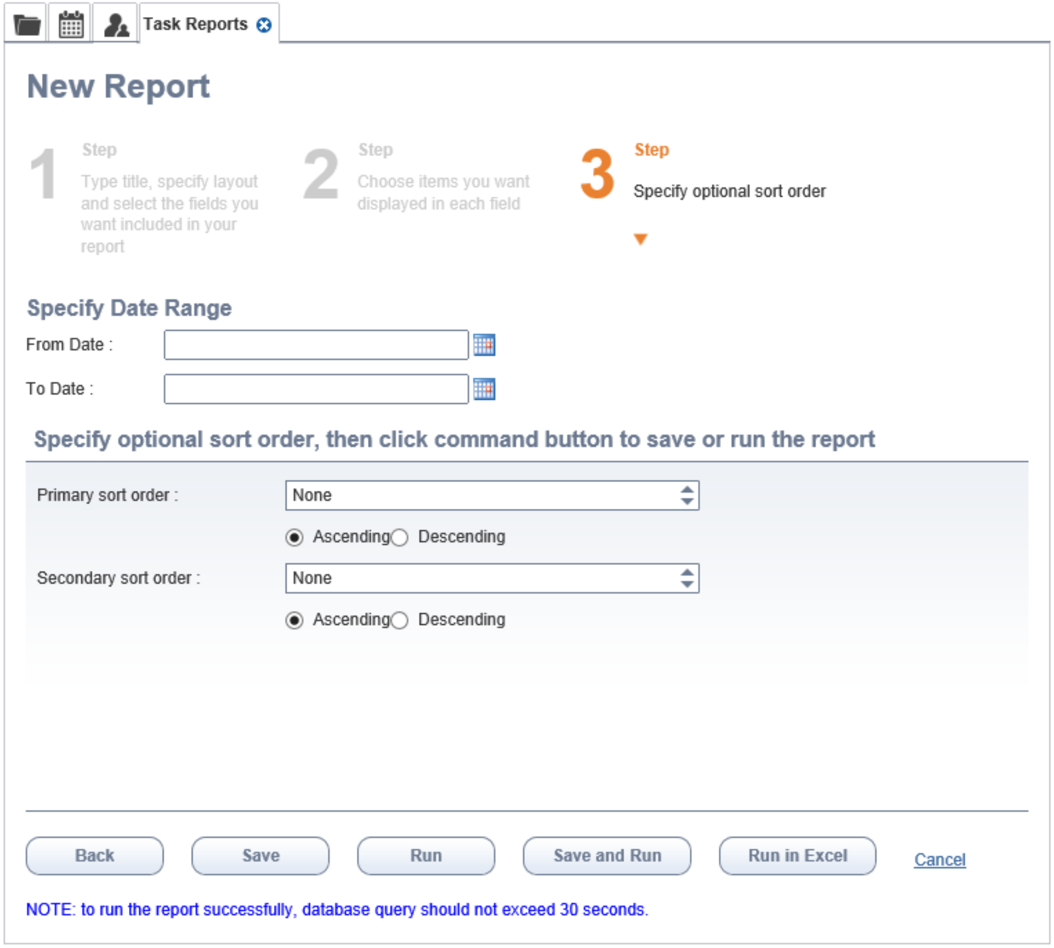
d. Click **Next**.
Agent Console displays the next step in the wizard.

5. In **Step 2** of the New Report wizard, for each customer field you chose in Step 1, create optional filtering statements.

a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.

b. Click **Next.**
Agent Console displays the next step in the wizard.

6. In **Step 3** of the New Report wizard, perform the following:



- Specify the date range for the report.
- Choose the primary and secondary report fields Agent Console uses to order the data contained in the case report, then choose the sort order of the two fields.

7. Produce and save the report. Perform one of the following:

- To save the report configuration without running the report, click **Save**.
- To run the report without saving the report configuration, click **Run**.
- To save the report configuration and run the report, click **Save and Run**.
- If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
  After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

POST AND VIEW NOTIFICATION MESSAGES

Agents can use Agent Console to send notification messages or notices to their own agent group.

All agents in the selected agent group receive the notice. Agents logged in to Agent Console receive the notice immediately. Agents who are not logged in receive the notice the next time they log in to Agent Console. You can see the Notices tab blinking red only if it is not in focus.

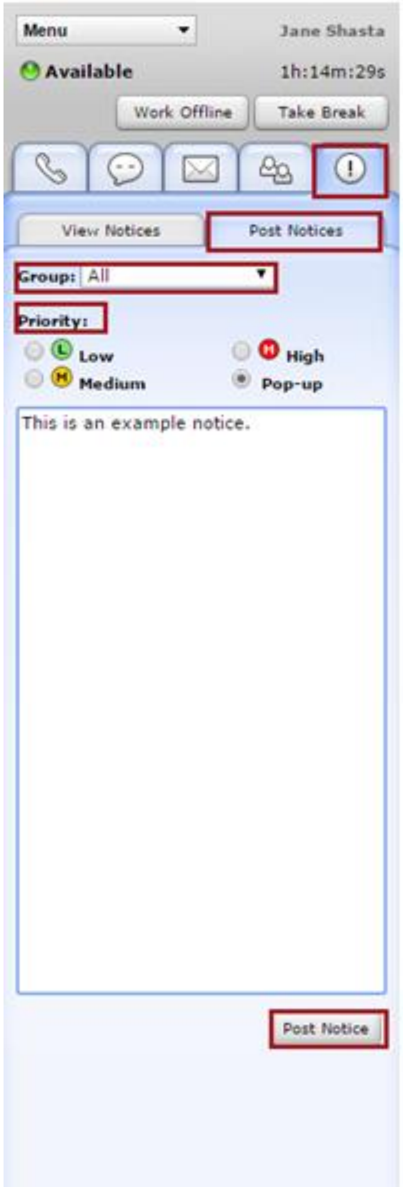
Send Notification Messages

As an Agent you may need to send a notification message or notice to your agent group. It is a fast and convenient way to provide a warning or send a general message to other agents in the same tenant.

To send a notice:

1. In Agent Console, go to the **Notices** tab.

2. Click the **Post Notices** tab.



3. In the **Group** list, select your agent group, or select **All** if you are a supervisor and want to send the notice to all agent groups you are supervising.
   You must select at least one agent group before you can send the notice.
4. In the **Priority** area, select the priority level of the message, or select **Pop-up**.

   Note: If you select Pop-up, Agent Console displays the notice as a pop-up message that disables all recipients' tools until the agent selects the message box and clicks **Close**.
5. Click **Post Notices** to send the notice.

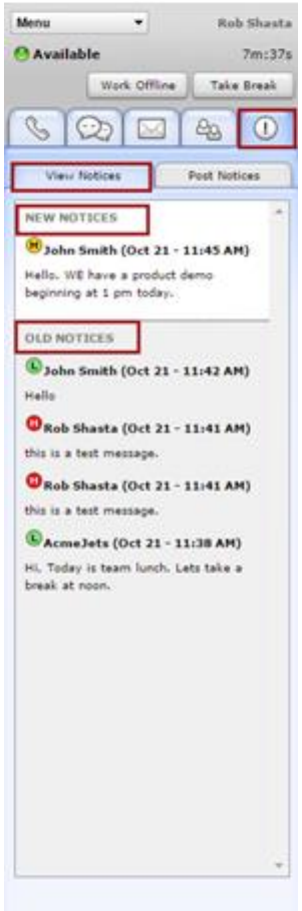
View Notification Messages

Agents can view the broadcast or notification messages sent by their supervisor or other agents in Agent Console. The Notices tab blinks red if you are logged in to Agent Console but working in another tab. If you are in Notices tab, go to View Notices to see the new or old messages.

To view a notification message:

1. In Agent Console, select the **Notices** tab.
2. Click **View Notices**.
   You can view the unread notices in this page. The notices are coded with colors based on their priority. Green shows low priority, yellow shows medium, and red shows high priority messages.

The Old Notices area retains your previously-viewed notices until you log out of Agent Console.



If the sender has selected the pop-up option for the message priority, a notification window appears.

The pop-up notice disables all recipients' tools until you select the message box and click **Close**.

USE THE COLLABORATE FEATURE

If your Agent Console account includes the Collaborate desktop sharing tool, you can use this feature to connect to a customer's computer and directly control that computer to provide hands-on assistance. When you use Collaborate to connect to a customer's computer, the customer sees every action you perform in real time. The customer can disconnect their computer from the Collaborate session at any time.

Contact your contact centre supervisor to verify that your computer and network configuration permits the use of the Collaborate feature.

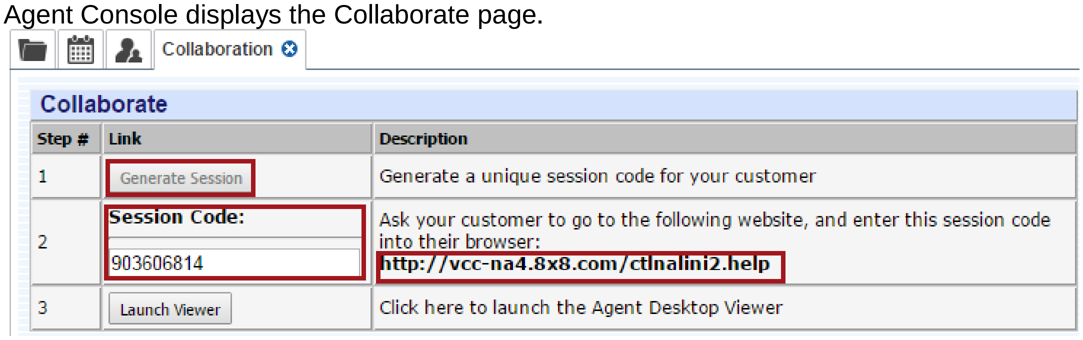
To use the Collaborate feature, you need to perform the following high-level tasks:

1. From the **Menu** drop-down of the Control Panel, open the **Collaborate** page to generate a unique Collaborate session identifier.
2. Send the Collaborate session identifier and the URL of the Collaborate web page to the customer, then help the customer connect to the Collaborate session.
3. Use the Collaborate feature to connect to the customer's computer.
4. Once connected, use the Collaborate feature to provide hands-on assistance.

Establish Collaborate Sessions

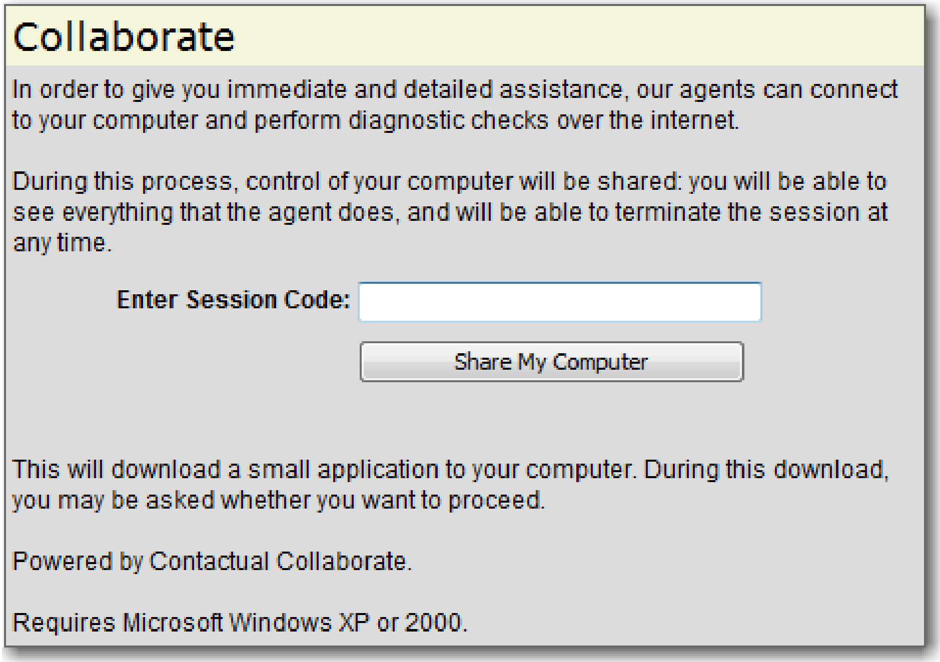
Perform the following procedure to establish a Collaborate session.

To establish a Hosted Contact Centre Collaborate session:

1. Click **Collaborate** from the **Menu** drop-down of the Control Panel.
   Agent Console displays the Collaborate page.
   

2. In the **Collaborate** page, click **Generate Session**.
   Agent Console creates a unique Collaborate session code and places the code in the Session Code text entry area.
   To the right of the Session Code text entry area, Agent Console lists the URL of the Collaborate web page.
3. Help the customer connect to the Collaborate session.
   a. Communicate the URL of the Collaborate web page and the unique Collaborate session code to the customer.
   You can use phone, chat, or email to provide the customer with the information they need to connect to the Collaborate session.
   b. After the customer connects to the Collaborate web page, direct the customer to paste the Collaborate session code into the **Enter Session Code** text entry area and click

Share My Computer.



c. When the customer is prompted to run or save the program file downloaded by the Collaborate feature, direct the customer to click **Run**.
If the customer receives an additional warning that the program's publisher could not be verified, direct the customer to click **Run** again.

d. When the Collaborate session prompts the customer to accept or reject the Collaborate session, direct the customer to click **Yes**.

e. Point out to the customer that they can click Disconnect Now in their Collaborate session to immediately end the session.

4. In Agent Console, in the **Collaborate** page, click **Launch Viewer**.
Agent Console creates a new browser session, then connects that session to the customer's computer. You can now use the Collaborate session to directly control the customer computer to provide hands-on assistance.

5. To end the Collaborate session, click **Disconnect** in your session window.
You can also direct the customer to click **Disconnect Now** in their Collaborate session.

GLOSSARY

A

Administrator

The person who uses the Configuration Manager to configure the contact centre's resources and behaviors. An Administrator can be the Primary Administrator with unrestricted access to all the configuration objects or a Role Based Administrator with full or partial configuration rights.

Agent

Agents use the Agent Console to view and manage customer interactions. Hosted Contact Centre supports Regular agents and Supervisor agents.

Agent Console

Hosted Contact Centre's browser-based graphical user interface (GUI) used by Agents to manage customer interactions.

Application Programming Interface (API)

An application programming interface (API) defines the way an external program can request services from another program. See also, Hosted Contact Centre Integrations.

Automatic Call Distribution (ACD)

ACD uses the number called and programmable call distribution logic to route incoming telephone calls to agents with the skills necessary to efficiently process the interaction.

Automatic Number Identification (ANI)

ANI identifies the origination number of a call offered to an Agent.

B

Billing Telephone Number (BTN)

For customers with multiple separate telephone numbers, the BTN consolidates those multiple numbers under a single phone number for billing purposes.

C

Call Treatment Choice

Refers to choices within a schedule which allows a time based selection of treatment choices when interactions enter a Hosted Contact Centre tenant.

Caller Name (CNAM)

An enhanced Caller ID feature that displays both the number and name for an incoming voice call. To provide the value-added CNAM service, the carrier uses the originating caller's phone number to locate the caller's name in the carriers' names database, then transmits both the number and name to the CNAM-enabled customer.

Calling Line Identifier (CLI)

The intended display number of the calling party. In some network configurations, the CLI contains the calling party's Billing Telephone Number (BTN) or Charged Party Number (CPN) to be displayed instead.

Channel

Phone, email, or Web chat interactions arrive at a tenant on a channel. Hosted Contact Centre uses skills based routing rules to place interaction requests into the appropriate Queue.

Collaborate

See Desktop Sharing.

Computer Telephony Integration (CTI)

CTI allows data associated with an incoming call or chat request to be presented to the responding agent in real-time. Hosted Contact Centre CTI typically presents this data as a "screen pop".

Configuration Manager (CM)

The portion of the Hosted Contact Centre application used by the contact centre's administrator to define and configure the resources and operational behaviors of the centre's tenant.

CRM API

The CRM API component of the Hosted Contact Centre Integrations enables third-party processes to access the internal CRM data.

Custom Role

An administrator defined role with custom privileges is called a custom role. Any role other than the system defined Super User role is referred to as the custom role.

Customer Relationship Management (CRM)

The Hosted Contact Centre CRM stores the contact centre's customer, case, and follow-up data. Numerous third-party CRM products also exist. Two examples of third-party CRM applications are Salesforce and NetSuite.

D

Desktop Sharing

If authorized, an agent can use the Collaborate Desktop Sharing feature to view and control a customer’s remote computer for purposes of providing assistance.

Direct Agent Access

In an IVR script, direct agent access permits a caller to reach an agent directly rather than through skills-based routing logic.

E

Email Script

A set of instructions that determine and direct the treatment and routing of an incoming email interaction.

G

Group

A group is a collection of agents created for management or reporting purposes. Groups can be functional (for example, Technical Support) or organizational (for example Supervisor Mary's Team). Each agent can be assigned to only one group, and cannot view or access information about other groups or group members.

H

Hosted Contact Centre

A contact centre that enables agents to be located in different geographical locations yet managed as if they were located in the same physical location.

Hosted Contact Centre Integrations Suite

An optional package containing the CRM API, Screen Pop, Triggers, and Reporting API components.

I

Interactive Chat Response (ICR)

Interactive Chat Response specifies the message sent in response to a new chat interaction.

Interactive Voice Response (IVR)

IVR enables touch tones to guide customer interaction with the contact centre. For example, an IVR script could direct a caller to Press 1 to be connected to Sales or Press 2 to be contacted to Support.

Intra Day Scheduler

Refers to the functionality of the tenant that allows creating multiple recurring choices within a day.

IVR Script

A set of instructions that prompts callers to choose options, then uses those choices to determine the optimal routing of an incoming phone interaction. See also, Interactive Voice Response.

O

Outbound Phone Codes

Outbound Phone codes offer a means to set a specific calling line identifier (caller ID) and optional outbound queue for outbound calls from your tenant. Outbound Phone Codes also may be used to track the purpose of an outbound call.

P

Primary Administrator

An administrator with unrestricted access to all the configuration objects in the Configuration Manager.

Q

Queue

A queue is an ordered collection of interactions waiting to be served by agents qualified to respond to these interactions. In addition to enabling the call centre administrator to customize how incoming interactions are prioritized and routed, queues also ensure that interactions are never lost or discarded.

R

Reporting API

The Reporting API component of the Hosted Contact Centre Integrations enables third-party processes to access statistical reporting data, and status information.

Responsible Organization (RespOrg)

The entity that controls and maintains a phone number. Telephone carriers are the most common type of RespOrg. SaskTel's provisioning department processes the RespOrg orders required to direct your contact centre's phone numbers to your Hosted Contact Centre client

Role

A role defines a set of privileges to configure a Hosted Contact Centre tenant. A role can be system defined or administrator defined.

Role Based Administrator

An administrator who assumes a role with full or partial configuration rights to the Hosted Contact Centre.

Role Based Management

Role Based Management is the functionality of Hosted Contact Centre that allows a tenant to distribute the configuration management functionality among multiple roles.

S

Screen Pop

The Screen Pop component of the Hosted Contact Centre Integrations enables third-party CRMs to display information in the Agent Desktop. See also, Computer Telephony Integration.

Service Level Agreement (SLA)

A commitment to process some number of interactions within a specific period of time. Service Levels are generally defined as X percent of interactions answered within Y seconds measured over Z minutes. In the Configuration Manager, use a queue's SLA tab to generate an alert whenever interaction processing levels fall below a specified commitment level.

Skill

A qualification that associates a particular queue to an agent.

Skill Levels

For each agent, Hosted Contact Centre uses high, medium, and low skill level identifiers to prioritize the distribution of interactions across the pool of available agents.

Status Codes

The Status Codes feature enables agents to supply supplemental information about why they changed their state. Status Codes provide enhanced workforce planning and management. For example, status codes could be created for different categories of breaks such as Break for Lunch, Break for Meeting, and so on.

Super User

The system defined role with unrestricted access to configure all administrative areas of the Configuration Manager. Primary Administrator inherits the Super User role automatically. Multiple administrators can be assigned to the Super User role. Privileges to the Super User role cannot be edited or revoked.

Supervisor

An agent with the supplementary privileges required to create FAQ categories and answers, monitor agent interactions in progress, listen to recordings of previous interactions, and create reports for the agents' groups they supervise.

Support Centre

In Configuration Manager, use the Support Centre page to create customer-facing support Web page for your contact centre, and specify the contact -- FAQs, desktop sharing, chat, email -- available from that page.

T

Tenant

Your unique and secure contact centre instance running on a SaskTel platform. You use the Configuration Manager to create and configure all aspects of your contact centre's resources and operational behaviors, including groups, incoming channels, queues, agents, routing scripts, skills, monitoring, recording, and reporting.

Transaction Code

The Transaction Codes feature enables agents to supply supplemental information about the reason for or outcome of an interaction. Transaction codes provide enhanced metrics or enable the calling line ID on an outbound call to be modified. For example, transaction codes could be created for different categories of sales activities such as Initial Contact, Prospect, Customer Satisfied, and so on.

Triggers

The Triggers component of the Hosted Contact Centre Integrations invokes a remote third-party process whenever an agent creates, deletes, or edits internal CRM record.

V

Voice over IP (VoIP)

The use of the Internet Protocol (IP) to carry telephone calls.

W

Wallboard

The SaskTel Wallboard for Hosted Contact Centre presents real time metrics of your contact centre operations allowing supervisors to manage customer demand proactively.

Web Application Programming Interface (WAPI)

Deprecated term for the optional SaskTel Integrations package.

Weekly Schedule

Defines recurring day-of-week/time-of-day treatment choices. These are typically normal business hours. Schedules follow the defined weekly pattern unless superseded by date-specific Special Events.