HOSTED CONTACT CENTRE

SUPERVISOR GUIDE 9.4

Version 9.4
Revision 1.0

SaskTel
Business Solutions

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OVERVIEW

The Hosted Contact Centre Agent Console enables agents to use a graphical user interface (GUI) to manage customer interactions across all channels. Agent Console is easy to use and requires no special software or hardware to run. It is 100% cloud-based and accessible from anywhere and anytime as long as you have a computer and internet access. With Agent Console, agents can have quick access to FAQs, use the Local CRM or their familiar External CRM, and see and chat with other agents for coaching and help. Agent Console administrators can take advantage of the permission-based application by allowing agents to access certain functions until they are up-to-the-speed and ready to take advantage of the full capabilities. See Get Started and Understand Your Interface to learn how to start.

You can log in as an administrator, supervisor, or agent:

- If you are the contact centre's primary administrator, SaskTel provides you with the information you need to access and configure your Hosted Contact Centre.
- If you are a supervisor, you can obtain your Supervisor Console login from your administrator.
- 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.

System Requirements

Each agent workstation requires a phone and a computer with Internet address:

- 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 Change Your Workplace Number for details.
- 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.

Note: 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'S NEW FOR SUPERVISORS?

New features and enhancements to 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 are features and enhancements introduced in recent product releases:

9.4 Release

- Agent Whisper: Contact centre supervisors can barge into active calls between agents and customers, listen in, and coach or train agents live with the Whisper feature.
- Automatic Monitoring: The silent monitoring feature allows supervisors to eavesdrop on a conversation between an agent and a customer without either party knowing that they are being monitored.
- Enhanced usability of real-time monitoring: Supervisors can access the monitoring tool from an easy-to-access monitoring tab along with other Local CRM tabs.
- Ability to pop open the monitoring window: Supervisors can open the monitoring window in a separate pop-up window.
- Improved Monitoring: The monitoring data is updated even when the supervisor's status is Break. Moreover, the last monitoring configuration before the supervisor logs out is saved, and presented when they log back in.
- Localization: We support European French and German.
- Browser Support: We support the Microsoft Edge browser.

GET STARTED

Your contact centre supervisor provides you with the URL, username, and password required to log in to your Agent Console account. See Login for the URL link and information. You do not need any specific hardware or downloads to run the Agent Console application. Agent Console is 100% cloud-based and runs on most computers with an Internet access, allowing you to keep business running smoothly.

Using Agent Console 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.
- create and delete FAQ categories and answers.
- create and run historical reports.
- monitor agents, queues, groups, and campaigns.

Login

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, a system-generated password, and a URL link to Agent Console.

To log in to Agent Console:

1. In your preferred browser, enter the URL for your Agent Console.
2. In the login page, enter your username and password. Click **Login**.
3. By default, Agent Console launches in the **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.

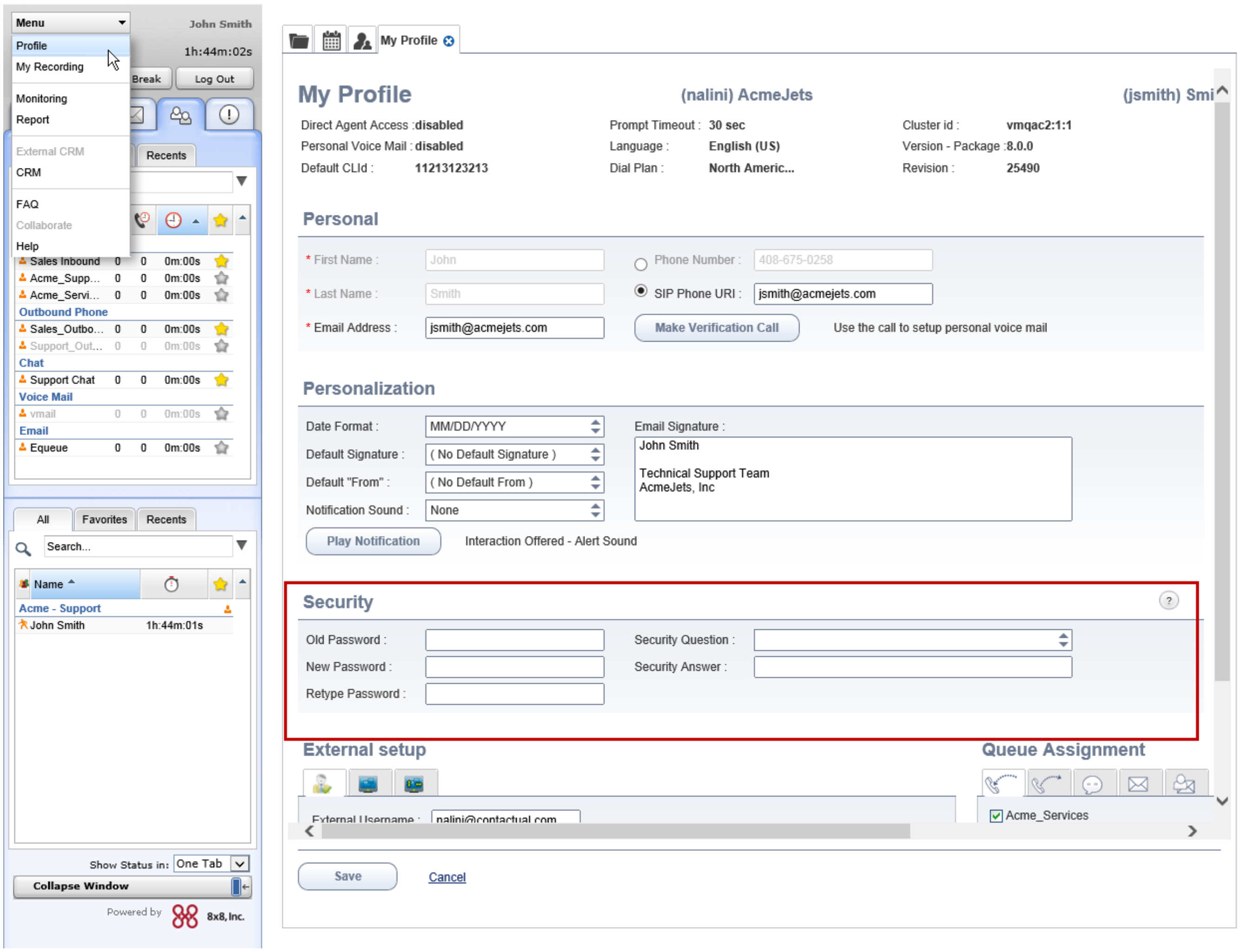
4. Select **Available** or **Work Offline** status to initiate the session.

Create a New Password

After you receive your account login credentials set by an administrator, log in to Agent Console using the credentials. You can create a new password by going to your Agent Console **Profile > Security**.

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.

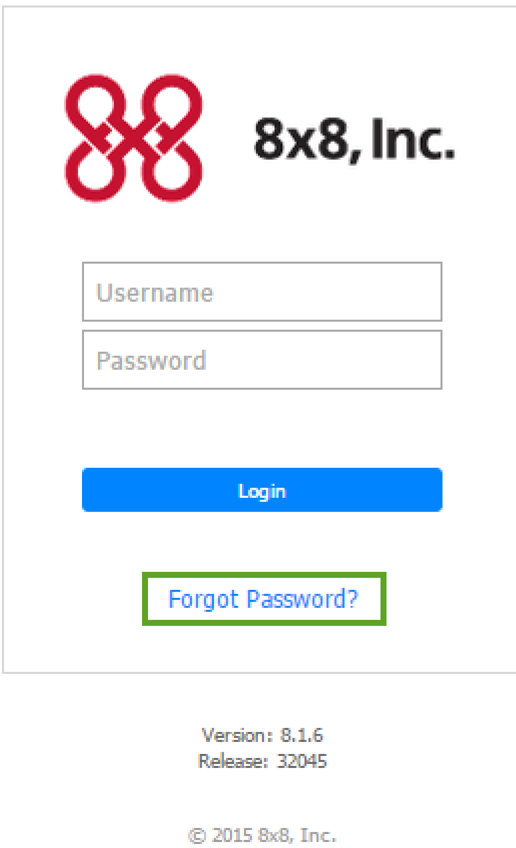
Your new password is activated from the next login session.

Reset Your 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.

Log in after You Reset Your 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.

Log Out

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**.

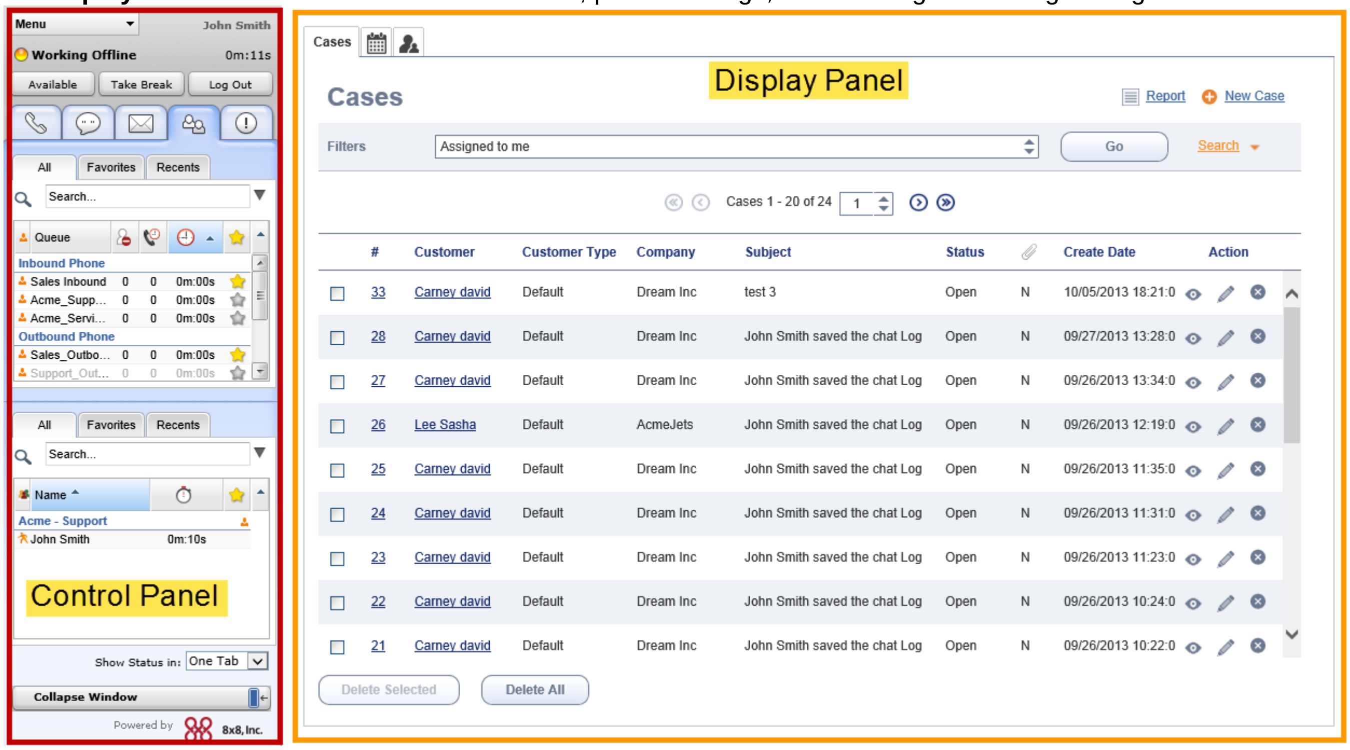
   Note: Closing the browser containing Agent Console does not log you out. You must click **Log Out** in the control panel in order to log out of Agent Console.

UNDERSTAND YOUR INTERFACE

The Agent Console interface is split into:

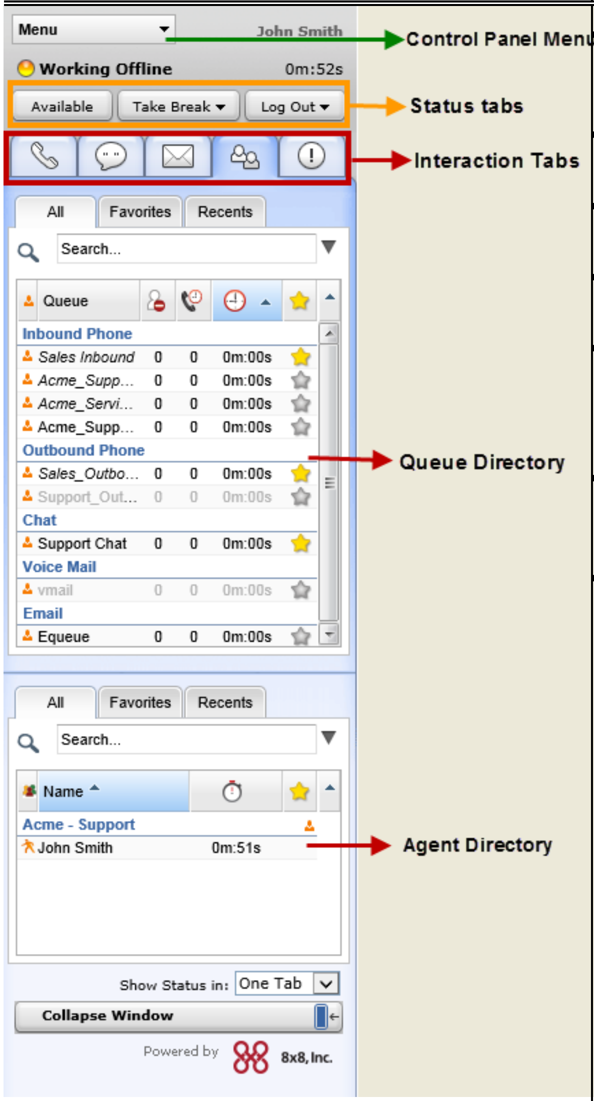
- **Control Panel**: Provides controls to process interactions in your contact centre and to manage agent status. For a quick look at the control panel functionality, refer to the Agent Console Quick Start Guide.

- **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 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.

Functional Area	Description
	▪ **Monitoring**: allows agents to display the Supervisor Console Queue and Agent management tool in separate browser window. ▪ **Report**: allows agents to display the Supervisor Console report selection and generation tool. ▪ **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 feature 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 SaskTel 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 the latest features in a separate window. o **Support**: allows agents to access our knowledge base, articles, videos, support telephone numbers, and live chat. o **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. ▪ **Monitoring**: allows supervisors to review and actively monitor agents, queues, groups, and campaigns.

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.

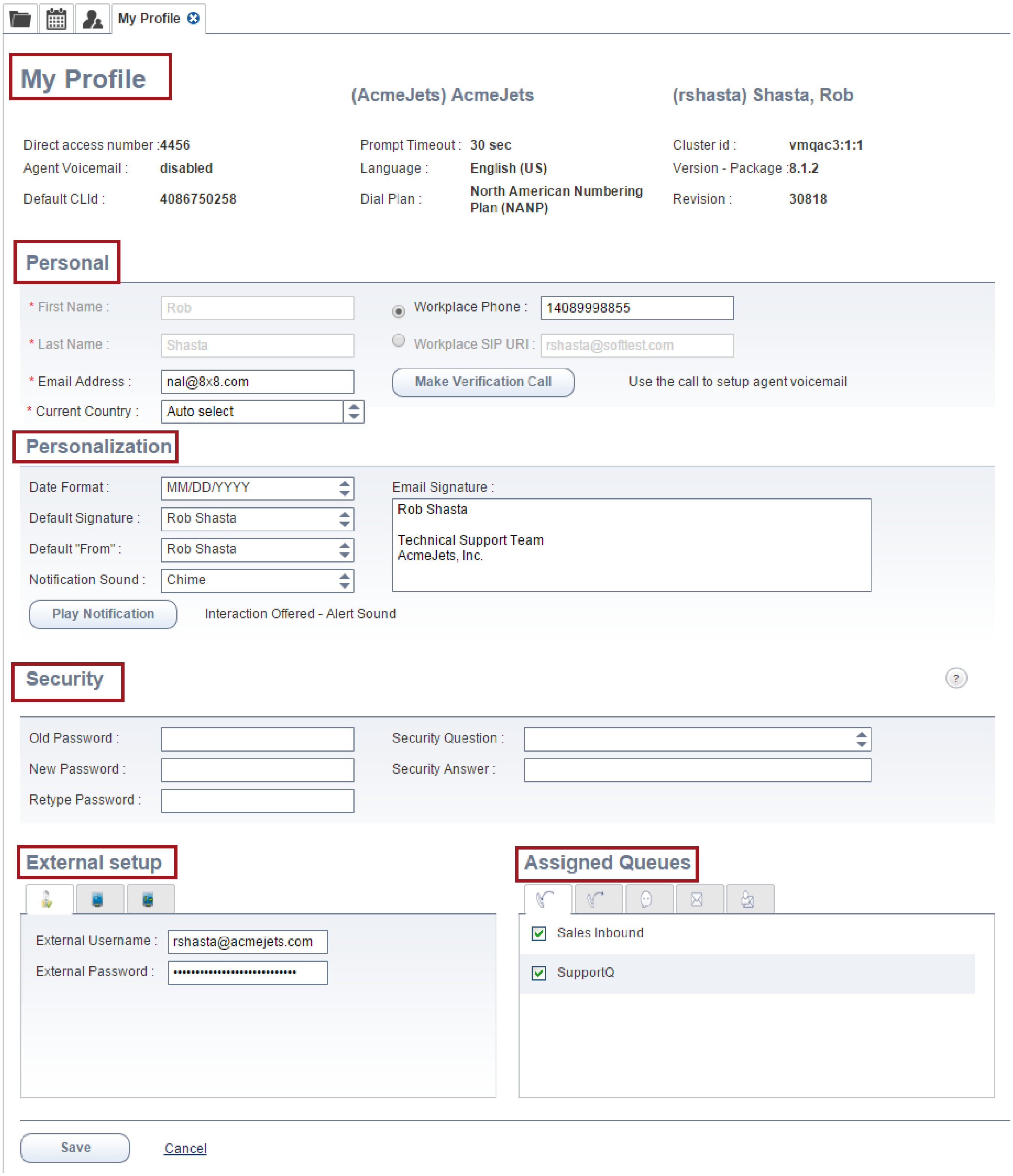
   Disclaimer: While we rely on your feedback and suggestions to improve our products, we do not guarantee a response from our developers. As always, we are committed to serving you better.

CONFIGURE YOUR 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.


My Profile
My Profile
(AcmeJets) AcmeJets
(rshasta) Shasta, Rob
Direct access number : 4456
Agent Voicemail : disabled
Default CLId : 4086750258
Prompt Timeout : 30 sec
Language : English (US)
Dial Plan : North American Numbering Plan (NANP)
Cluster id : vmqac3:1:1
Version - Package : 8.1.2
Revision : 30818
Personal
* First Name : Rob
* Last Name : Shasta
* Email Address : nal@8x8.com
* Current Country : Auto select
Workplace Phone : 14089998855
Workplace SIP URI : rshasta@softtest.com
Make Verification Call
Use the call to setup agent voicemail
Personalization
Date Format : MM/DD/YYYY
Default Signature : Rob Shasta
Default "From" : Rob Shasta
Notification Sound : Chime
Play Notification
Interaction Offered - Alert Sound
Email Signature :
Rob Shasta
Technical Support Team
AcmeJets, Inc.
Security
Old Password :
New Password :
Retype Password :
Security Question :
Security Answer :
External setup
External Username : rshasta@acmejets.com
External Password :
Assigned Queues
Sales Inbound
SupportQ
Save
Cancel

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. • **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.

Agent Profile	Description
	• **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.

Change Your Workplace Number

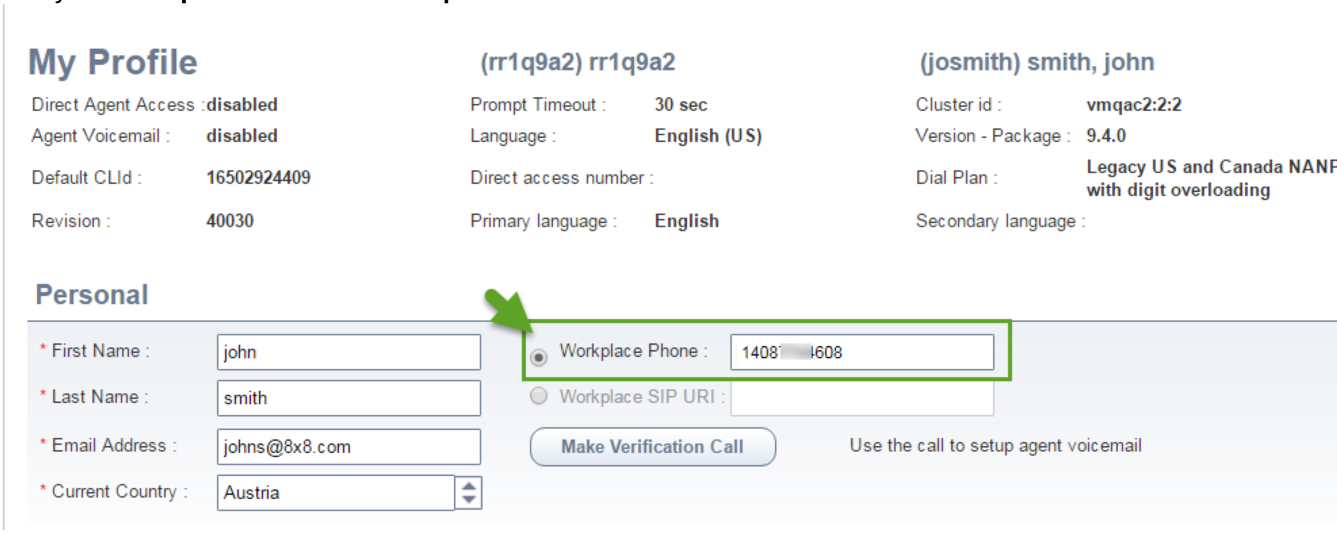
Your contact centre supervisor has configured your Agent Console account to conform with your contact centre's technical requirements and company policy.

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]

[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

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.
How to Format Your 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

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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.

Configure 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 Configure Your Profile.

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

Configure 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.

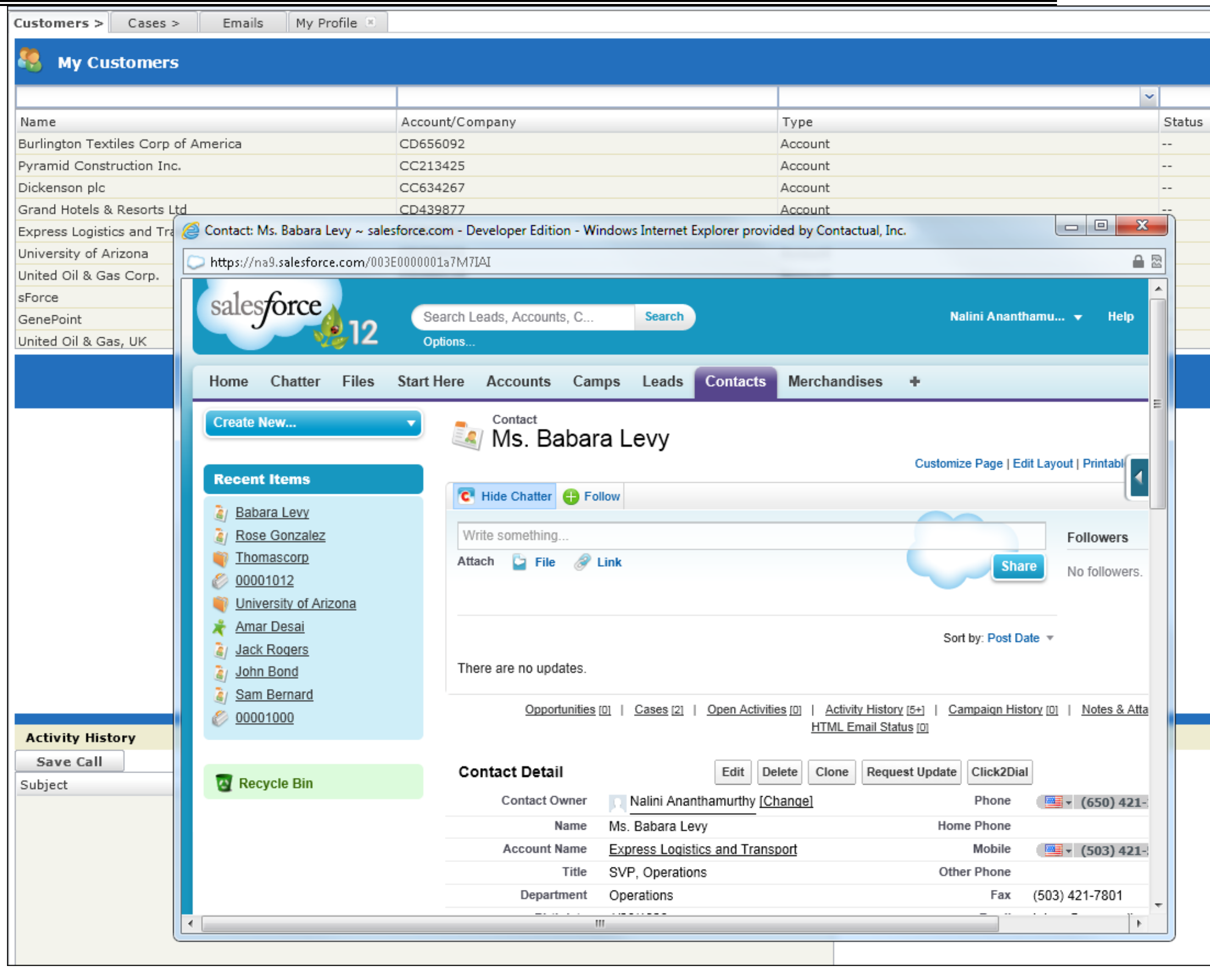
   Note: The agent's ability to define Screen Pop window properties is available only for Salesforce, Zendesk and MS Dynamics integration.

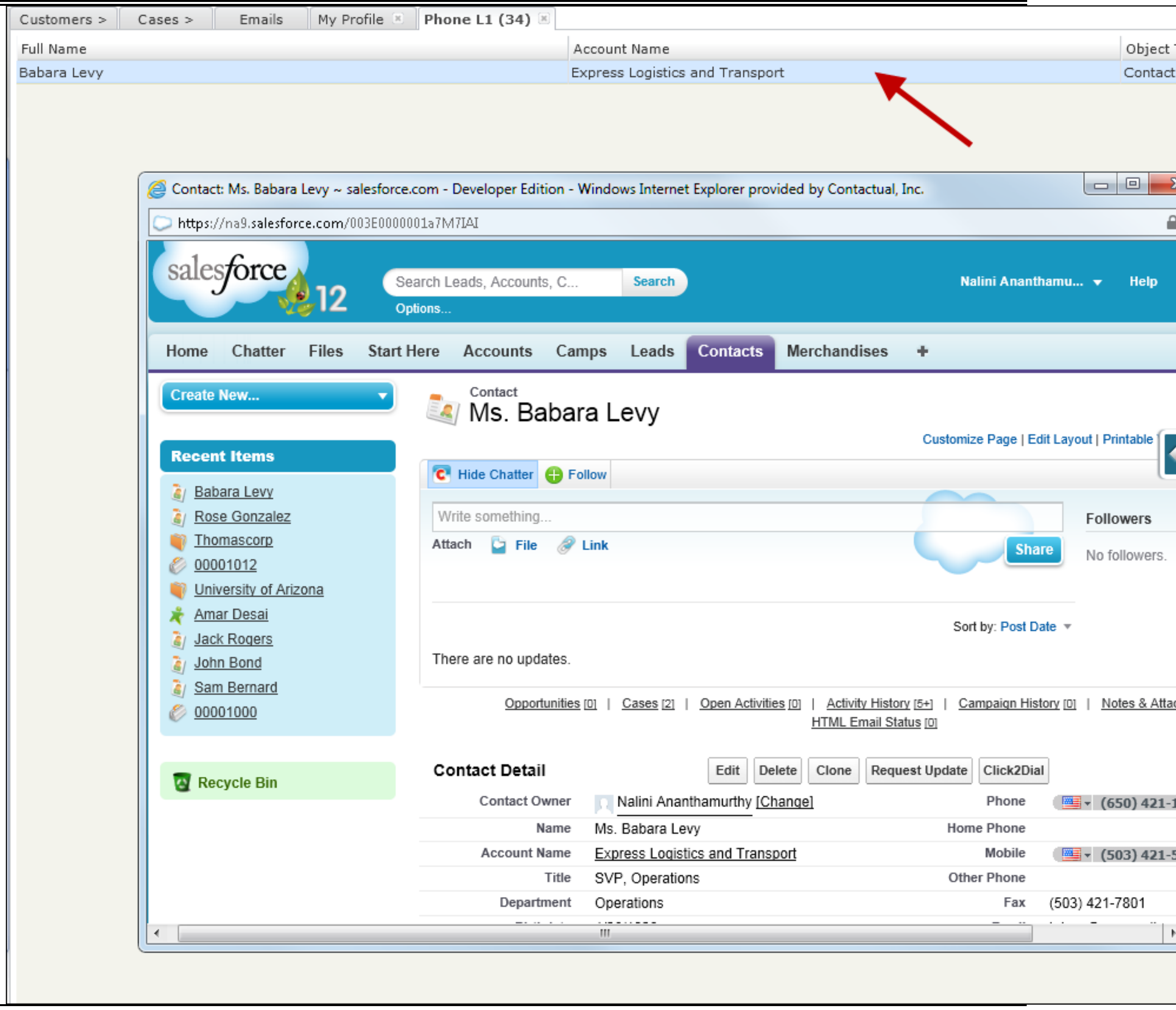
7. Click **Save**.
   Your settings help launch your external CRM from Agent Console.
   Your supervisor provides you with the information you need to access and work with your contact centre's external CRM product.

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. ○ **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.

Functional Area	Description
	 If this option is disabled, the matching single record lists in a tab in addition to opening in a new window.

<table>
<tr><th>Functional Area</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Window Properties Tab


Note: This tab is enabled only if the tenant administrator grants access.</td><td>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.

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.</td></tr>
</table>

Personalize 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**.

View Your 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.

SET 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 cent.

  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 unavailable when the agent changes the status to On Break.	**No**	▪ Available ▪ Work Offline ▪ Log Out

ADMINISTER CONTACT CENTRE

Your contact centre administrator can configure specific Agent Console accounts to include access to supervisory tools.

Agent Console accounts with access to supervisory functions are referred to as Supervisor Console accounts. The topics in this section focus on the use of Supervisor Console features.

Supervisor accounts have exclusive access to the following Agent Console features that are not enabled for non-supervisory agent accounts:

- Access Hosted Contact Centre Analytics
- Create and edit FAQs

- Create historical reporting
- Monitor agents, queues, and groups

In addition to supervisory features, supervisors may choose to perform or guide and validate the use of certain operations that agents have access to, such as agent profile configuration. These include the following agent-optional abilities to:

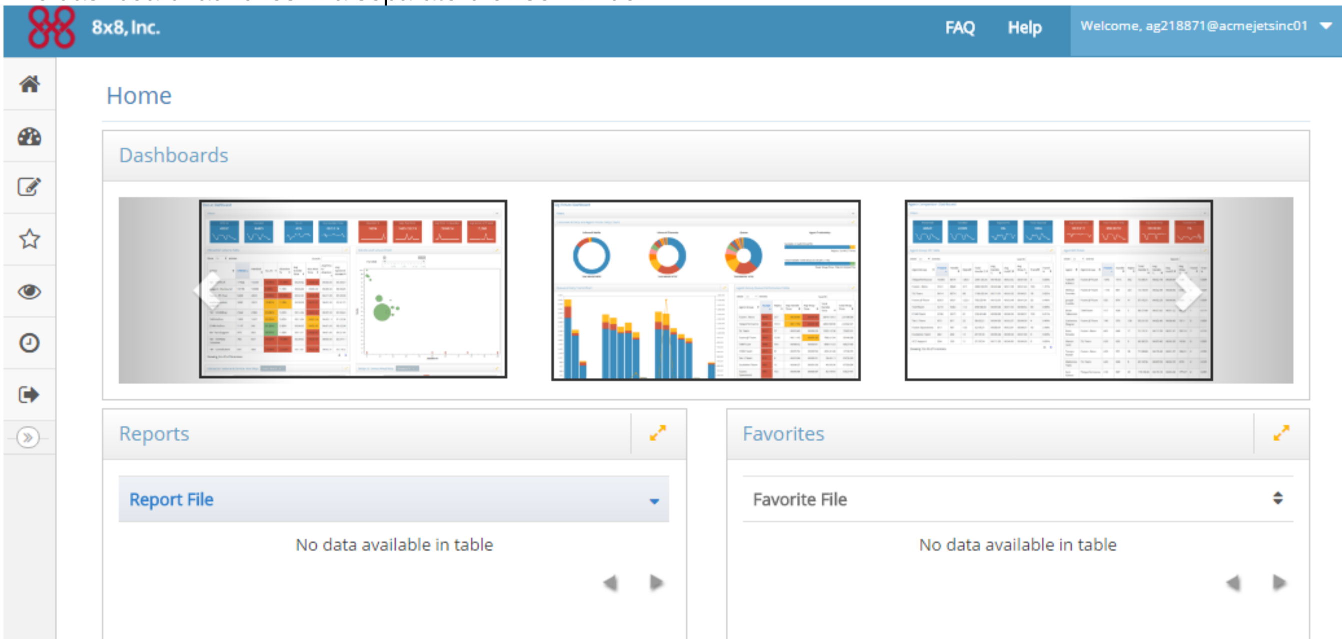
- Delete customer and case records from the Local CRM
- Pull and delete pending email interactions from a queue
- Use the Monitoring tab to remove agents from queue assignments

Access Hosted Contact Centre Analytics

Supervisors can launch SaskTel Hosted Contact Centre Analytics from Agent Console, eliminating the need for a separate login. Hosted Contact Centre Analytics provides industry-leading insights about the performance of your contact centre. It is more than just data. It brings powerful graphical tools that reveal actionable business information. Hosted Contact Centre Analytics goes beyond traditional call centre reporting. You can track the performance of your agents and contact centre, and see how your customers are being served across all channels.

To access Hosted Contact Centre Analytics:

1. Log in to Agent Console.
2. Click next to the drop-down menu.
3. Click **Business Intelligence** to launch the SaskTel Hosted Contact Centre Analytics tool.
   The dashboard launches in a separate browser window.



4. Use the navigation menu on the left to access dashboards and create custom reports.
   For details on the capabilities of this tool, refer to the Hosted Contact Centre Analytics Guide.

Create and Edit FAQ Content

Due to the repetitive nature of inquiries handled by contact centre agents, building an FAQ (Frequently Asked Question) knowledge base for the most frequently-asked questions saves agents time in fetching responses for customers. Whenever a customer seeks information, agents can refer to the FAQ knowledge base and provide information quickly. Agents can embed FAQ content in a chat interaction or an email. Your contact centre administrator can publish this FAQ knowledge base on your website for broader access.

Hosted Contact Centre allows supervisors to build FAQs. You can enrich FAQ content by embedding images or attaching files. Build the FAQs once, and refer to them, time and again.

Note: Hosted Contact Centre limits the ability to create FAQs to supervisors. Agents do not have the privileges to create or edit FAQs.

Building content for FAQs requires you to:

- Create FAQ Categories
- Create FAQ Answers

For details about inserting FAQ answers into an email or chat, see Insert FAQ Responses into Emails, and Insert FAQ Responses into Chat Interactions.

Create FAQ Categories

FAQ categories serve as containers for one or more FAQ answers. Before you can create the first FAQ, you must create the containing category.

To create an FAQ category:

1. Log in to Supervisor Console.

   Note: The privilege to create and edit FAQs is limited to supervisors.

2. From the Control Panel menu, select **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.

3. In the **Frequently Asked Questions** window, click **New Category**.
   Supervisor Console displays the **Add Category** dialog box.

4. In the **Add Category** dialog box, enter the name of the FAQ category. Then, you can do the following:

   - To prevent Hosted Contact Centre from displaying this FAQ category in any of your Support Centres, select **This Category is Private**.
     Private FAQ categories can only be accessed by contact centre agents, not on a customer-facing Support Centre Web page.

   - For FAQ categories that are not private, select the necessary check boxes to specify Support centres that display the FAQ category.

5. Click **OK**.
   The new FAQ category appears in the list of FAQ categories.

Edit or Delete FAQ Categories

To edit an existing FAQ category:

1. Go to the **FAQ** window in Agent Console.
2. Click **Edit Category**.
   The **Edit Category** dialog box opens.
3. Make the desired changes in the category, and save.

To delete an FAQ category:

Before you can delete an FAQ category, you must delete all FAQ answers defined within that category.

1. Log in to Supervisor Console.
   Only supervisors can create or edit FAQ categories.
2. In the Control Panel menu, click **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.
   For details, see Create FAQ Answers.
3. In the **Add FAQ Category** window:
   a. In the list of FAQ categories, click a category.
   b. In the list of FAQ answers, for each answer contained in the FAQ category, click **Delete**.
   c. In the confirmation box to delete, click **OK**.
4. After deleting all FAQ answers contained in the FAQ category, in the list of categories on the left, click **Delete**.
5. Click **OK** in the delete confirmation dialog box.
   Supervisor Console deletes the selected FAQ category.

Create FAQ Answers

Define a frequently-asked question and response for your contact centre knowledge base. FAQs serve as resources to agents assisting customers. Your contact centre may also publish the FAQ resource on your company's support centre website. You must add the FAQ answers to the FAQ categories.

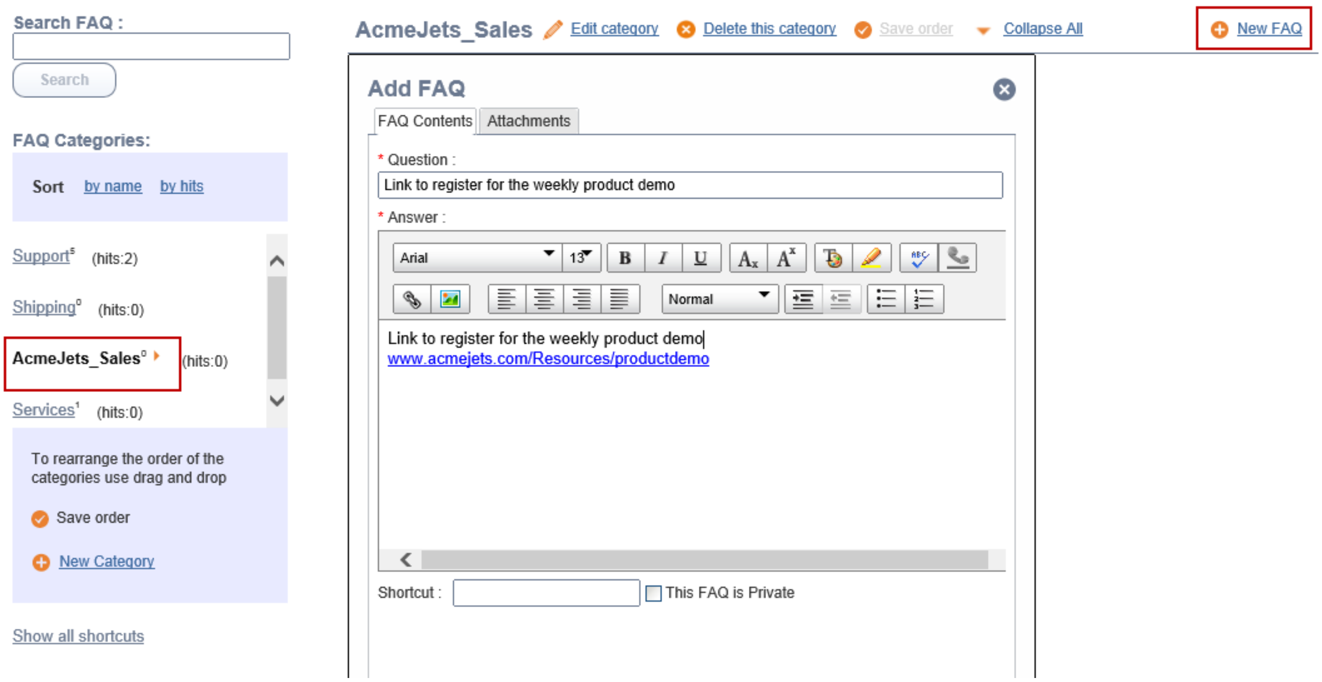
Before You Begin

Make sure you have defined an FAQ category. For details, refer to Create FAQ Categories.

To create an FAQ answer:

1. Log in to Supervisor Console.
   Only supervisors can create or edit FAQ categories.
2. From the Control Panel menu, click **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.

3. Select an FAQ category from the panel on the left, then in the panel on the right, click **+New FAQ**. Supervisor Console displays the **Add FAQ** dialog box.



4. In the **Add FAQ** dialog box:
   - In the **Question** text entry area, enter the frequently asked question.
   - In the **Answer** text entry area, enter the answer to the frequently asked question.
   - In the **Shortcut** text entry area, enter a shortcut that agents can use to quickly insert the answer to the FAQ into an email or chat.
     For information about inserting FAQ answers into email or chat responses, see Insert FAQ Responses into Emails, and Insert FAQ Answers into Chat Messages.
   - To prevent Hosted Contact Centre from displaying this FAQ answer in any public Support Centre, select **This FAQ is Private**.
     Private FAQ categories can only be accessed by contact centre agents, not on a customer-facing Support Centre Web page.
5. Embed any supporting data, such as images or attachments. For details on how to embed images or attach files, see Enrich FAQ Content.
6. Click **OK**.
   Supervisor Console displays the **Frequently Asked Questions** window. The new FAQ answer appears in the category's list of FAQ answers.

The rich text editor for FAQ definition allows you to define visually appealing content with intuitive editing abilities. For details a summary of elements in rich text editor, refer to Menu Elements of the Rich Text Editor.
Enrich FAQ Content

You can add images or files to an FAQ response with just a few clicks.

To embed images in an FAQ response:

1. Click  from the rich text panel.
2. At the URL prompt, specify the URL location of the desired image.

   Note: The image to embed must be hosted on a web server.

   The image gets inserted in the FAQ response.

To attach files:

1. Click the **Attachments** tab in the FAQ definition.
2. Browse and upload files stored locally.

Historical Reports Overview

Hosted Contact Centre provides standard historical reporting with extensive filtering capabilities. You can generate reports on demand by date interval, agents, agent groups, queues, and media type. You can access reporting functionality through the Supervisor Console and generate the output in Excel spreadsheet format.

Benefits of historical reporting functionality include:

- Accessing vital canned or ad-hoc contact centre statistics on demand
- Analyzing historical reports and trends, identifying areas for improvement
- Using a familiar application, Microsoft Excel, to further customize the reports and analyze the data

Overview

Hosted Contact Centre provides an out-of-the-box package of reports focusing on agents, queues, channels, media, and campaigns. Click **Report** under the Control Panel menu to access historical reporting.
The reports available may be grouped as follows:
Agents Statistics

You can generate reports that provide historical data on agent activity, including the login time, logout time, number of interactions handled, time spent waiting or processing interactions, and details of accepted transactions.

- Time on Status
- Login time
- Transactions
- Transactions per media
- Transactions per media per queue
- Transactions per media per channel per queue
- Processing and post processing times

- Processing and post processing times per media
- Processing and post processing times per media per queue
- Processing and post processing times per media per channel per queue
- Other transaction analysis
- Detailed accepted transactions activity
- Detailed Outbound call activity
- Status change details
- Detailed accepted transactions with wrap up codes
- Detailed Outbound Transactions with wrap up codes
- Transactions grouped by wrap up codes
- Time on Break/Offline with Status Codes

Groups Statistics

You can generate a report on group activities such as waiting time, processing and post-processing time, time on break, time spent offline, and total login time per individual group and for all.

- Time on status

Media Statistics

These reports group transaction details by media such as phone, chat, email, and voicemail. You can get data about the number of interactions number of interactions that were answered within SLA, average waiting time and longest waiting time, the time interval within which the interactions were answered all grouped by media. You can also get statistical data on abandoned interactions per media.

- Transactions
- Abandoned transactions
- Accepted transactions - on line media
- Accepted transactions - off line media

Queues Statistics

The following reports provide specific data about the number of interactions that entered a queue, number of interactions that were answered within SLA, average waiting time and longest waiting time, the time interval within which the interactions were answered. You can also get statistics on abandoned interactions, including the number of abandoned interactions, average time to abandonment, and longest waiting time before being abandoned.

- Transactions
- Abandoned transactions
- Accepted transactions – On line media
- Accepted transactions – Off line media
- Detailed entered transactions activity
- Detailed accepted transactions activity

Channel Statistics

The following reports pull statistical data on the interactions grouped by channels under each media.

- Transactions
- Abandoned Transactions
- Accepted Transactions – On line media
- Accepted Transactions – Off line media

Campaign Statistics

The following reports provide information about campaigns, including campaign name, status, start and end time, total number of records processed, and statistics of calls processed based on the wrap up codes.

- Campaign Details
- Campaign Record Details
- Campaign Transaction Details
- Detailed Transaction Activity

In Addition to the above reports, you can generate reports on Status Codes (find agent's status change with probable reasons), Transaction Codes (collect call disposition information), and Campaigns (collect campaign statistics for analysis and to determine the need for follow-up).

Summary of Historical Reports

Supervisor reports are available for Agents, Queues, Channels, Media, Groups, and Campaigns. The following table lists the title of each historical report, and uses an **X** to indicate whether a version of the report exists for Agents, Queues, Channels, Media, Groups, or Campaigns.

Report Title	Agents	Queues	Channels	Media	Groups	Campaigns
Detailed Transactions Activity	X	X	X	X		X
Abandoned Transactions		X	X	X		
Accepted Transactions - on line media		X	X	X		
Accepted transactions - off line media		X	X	X		
Campaign Details						X
Campaign Record Details	X					X
Campaign Transaction Details	X					X
Detailed accepted transactions activity	X	X				
Detailed accepted transactions with wrap up codes	X					
Detailed entered transactions activity		X				
Detailed outbound transactions with wrap up codes	X					
Detailed Outbound Call activity	X					
Transactions	X	X	X	X		

Report Title	Agents	Queues	Channels	Media	Groups	Campaigns
Transactions per media	X					
Transactions per media per channel per queue	X					
Transactions per media per queue	X					
Login time	X					
Other transactions analysis	X					
Processing and post processing times	X					
Processing and post processing times per media	X					
Processing and post processing times per media per queue	X					
Processing and post processing times per media per channel per queue	X					
Status Change Details	X					
Time on status	X				X	
Transactions grouped by wrap up codes	X	X	X	X		
Time on Break/Offline with status Codes	X					

Generate Historical Reports

Use the Supervisor Console reporting function to create historical reports, or extract data for your contact centre's Groups, Agents, Queues, Channel, and Campaigns. This data can be used to assess the performance of your Hosted Contact Centre.

As a supervisor, you can generate historical reports to assess the performance of Hosted Contact Centre. Supervisors can access the Historical Report Wizard tool to easily select from scores of pre-defined report templates, customize the reporting parameters, and save them for reuse or duplication. The reporting supports named filter templates to ease repetitive tasks.

The New Historical Report Wizard walks you through the following steps:

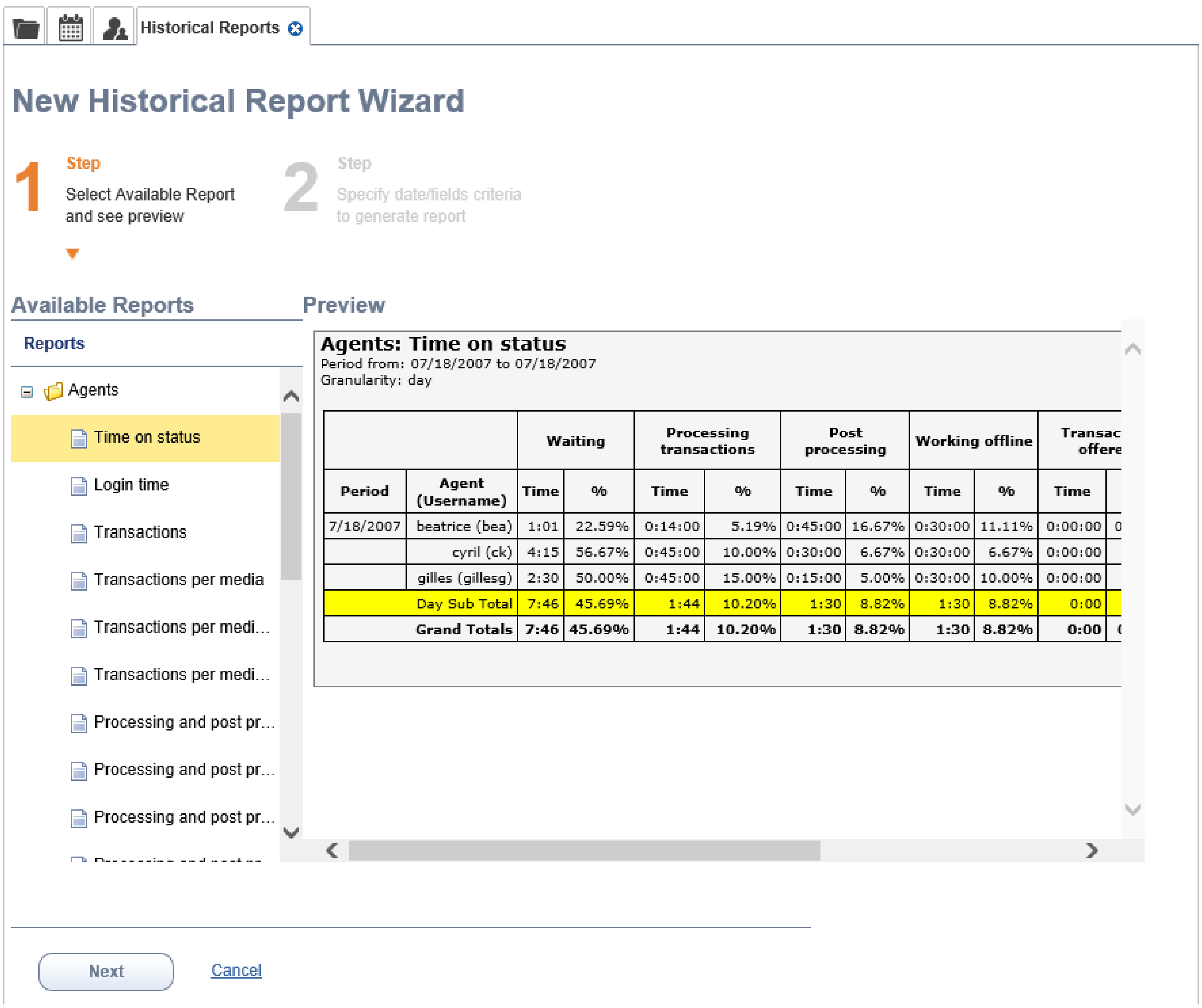
1. Select a pre-defined report template.
2. Add or customize reporting parameters such as agents and queues.
3. Save and run the report.

If you have restricted access to historical reports, you see historical data only pertaining to the groups and queues you supervise or are a member of.

When you generate a report, Supervisor Console exports the report to Microsoft Excel. You can then print the report, customize the report's appearance, or export the report from Excel in a format (such as CSV) for import into another program.

To generate a historical report:

1. Log in to Agent Console as a supervisor. Only supervisors can generate historical reports.
2. From the Control Panel menu, select **Report**.
   The Display Panel opens the Historical Reports tab.
3. Click **New Report** on the top-right.
   The Historical Report Wizard walks you through the steps to generate a new report.
4. In **Step 1**, choose a template from the list.
   In the **Preview** area, Supervisor Console displays simulated data in an example of the selected report's layout.

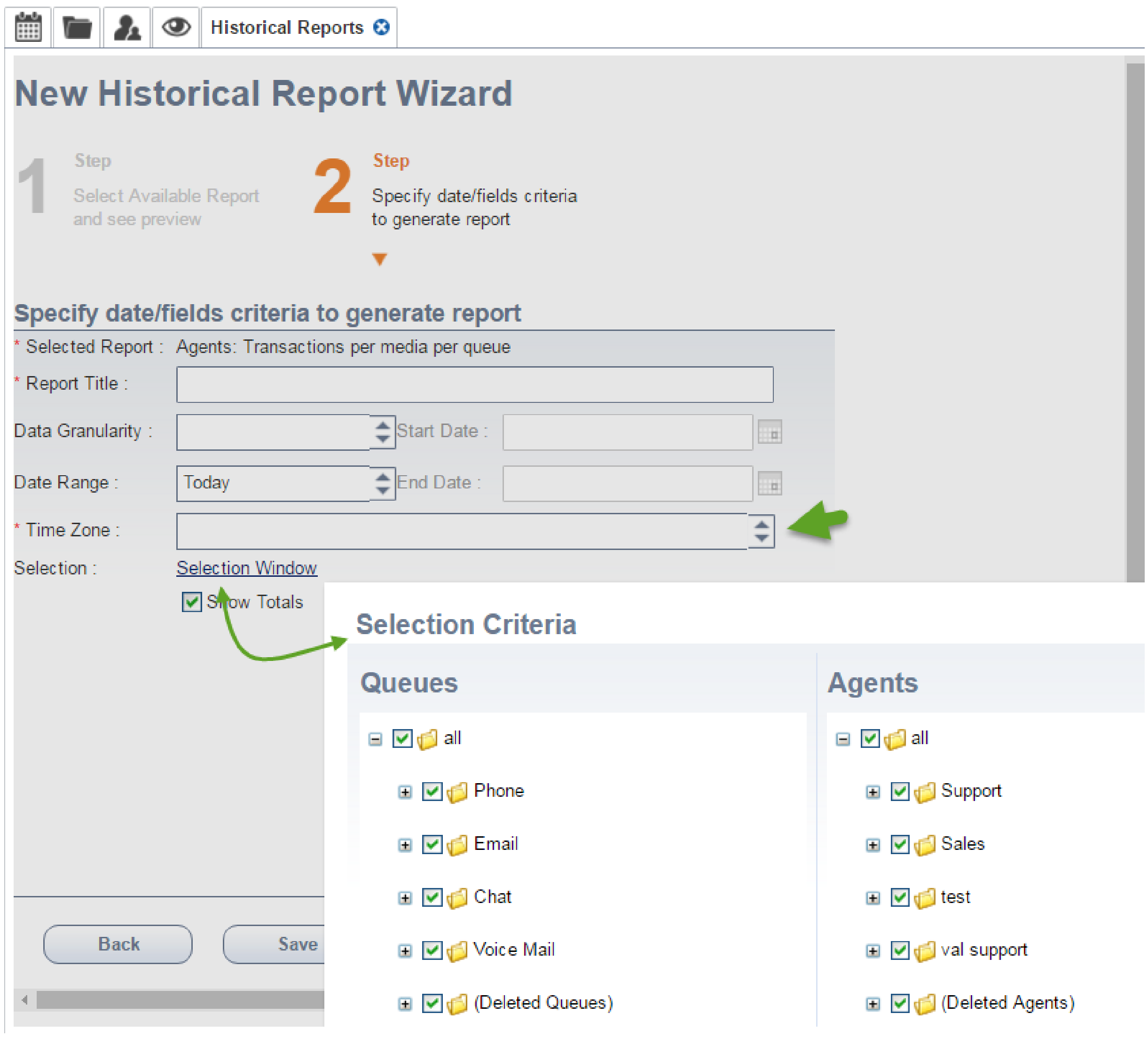


5. Based on your selection, use the Selection tool to specify **Queue selection** or **Agent selection**.
   You can include or exclude deleted agents and queues information in the reports. For details on access to deleted agents and queues, refer to Generate Reports on Deleted Queues and Agents.
6. Specify the selected report's granularity and optional date range.

a. In the **Data Granularity** list, choose a standard reporting resolution interval or choose **range**. Granularity specifies how frequently the report totals the data contained within the historical report.

b. If you chose **range**, in the **Date Range** list choose a standard date range or choose **custom**.

c. If you chose **custom**, in the **Start Date** and **End Date** calendars, choose the first and last dates included in the custom date range.



7. Select a time zone from the available time zones.
8. Perform one of the following tasks:
   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To run the report and save the report configuration, click **Save and Run**.

   The Supervisor Console generates the report, exports the report as a Microsoft Excel file.

Note: If you have restricted access to historical reports, you will see historical data pertaining only to the groups and queues you supervise or are a member of.

Generate Reports on Deleted Queues and Agents

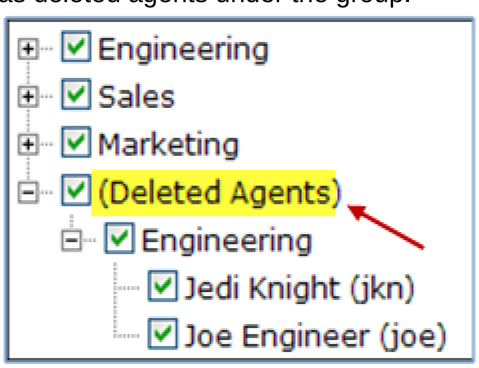
Supervisors can customize report data by including or excluding information on deleted agents or queues. Based on your supervisor privileges, you can control the report data by individually selecting agents or queues. Supervisors have improved visibility and increased flexibility in customizing the report data. If you have sufficient privileges to see all deleted agents, groups, and queues in the **Agent Selection** or **Queue Selection** list in the Reporting screen, you may include or exclude data about deleted agents and/or queues.

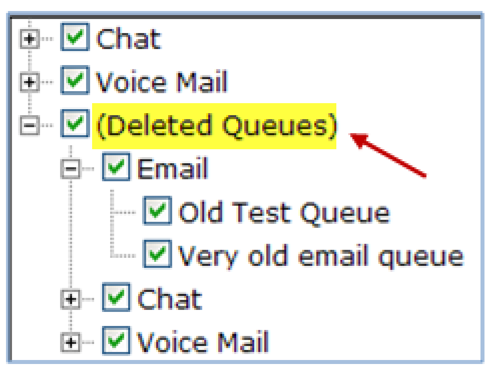
The following table summarizes supervisors' improved access to historical data based on their privileges:

Supervisor has Restricted Access	Access to Historical Data
No	• All active agents from existing groups • All deleted agents from existing and deleted groups • All active and deleted queues
Yes	• All active and deleted agents from existing groups with monitoring privileges • All deleted agents/groups which you previously monitored • All active queues which you supervised • No access to any data about groups/queues you do not monitor

To include deleted agent and queue information in the reports:

1. Click a report to generate.
2. Click the **Agent Selection** and/or **Queue Selection** drop-down list. You can see all agent groups.
3. Select individual agent groups or queues. If you expand an agent group, you can see current as well as deleted agents under the group.





4. You may select a list of deleted agents and/or queues from the list.
5. Enter other criteria and click **Export** to generate a report.

For details on generating historical reports, refer to Generate Historical Reports.

Report on Status Codes

Status codes enable contact centre supervisors to track how an agent spends his time through a workday. When an agent is logged in to Agent Console, they accept or reject interactions, takes breaks, works offline, or logs out. As a supervisor, you may want to know reasons for an agent changing the status or rejecting an interaction. Agent statuses, such as On Break and Work Offline, do not point out the specific reasons for status changes by the agent. The status codes associate an agent's status change with probable reasons, and enable supervisors or managers to track the work pattern of agents.

Your contact centre administrator can create customized status codes in Configuration Manager if the Hosted Contact Centre tenant includes the optional status codes feature.
The following table lists agent status changes with examples of corresponding status codes.

Agent Statuses on Agent Console	Examples of Status Codes
Take Break	▪ Lunch ▪ Short Break ▪ Restroom
Work Offline	▪ Attend Meeting ▪ Project Work ▪ Training ▪ Outbound Call
Logout	▪ End of shift ▪ PC Reboot
▪ Reject Phone ▪ Reject Chat ▪ Reject Email	▪ Working on a Case ▪ Technical Issue ▪ Not Ready for Interaction ▪ Nearing Break Time

As an agent processes interactions and changes their status, Agent Console prompts the agent to select from your list of customized status codes. Agent Console incorporates the available codes into historical reports.

How do agents use status codes?

Agents assigned to a status code list are presented with individual status codes in the list when they choose an action associated with codes. The agent must choose a code from the presented list, and only then is allowed to proceed with the action. For example, when an agent who is active changes their status to **Work Offline**, a list of status codes associated with the action, such as **Attend Meeting** and **Project Work**, are presented in a drop-down list on the Control Panel. The agent must choose a status code from the list that describes the reason for the status change before being able to work offline.

How do supervisors use status codes?

Supervisors can track how an agent spends time by generating the following two historical reports:

- **Agent: Status change details**: The report gives detailed information on an agent's status changes, the time at which an agent changed their status, and an associated reason, if any. When the supervisor browses through the report, they get information about how often an agent changed status, as well as the reason for status change.

Agent: Status change details
Period: 04/13/2011 - 04/13/2011
Granularity: day
Report Generated on: 04/13/2011 11:19:16

Period	Agent (Username)	Status	Time	Reason		Transaction
				Code	Text	
04/13/2011	Nalini Ananthamurthy (na	Logged In	04/13/2011 10:29:34	N/A	N/A	N/A
04/13/2011	Nalini Ananthamurthy (na	On Break	04/13/2011 10:29:35	N/A	N/A	N/A
04/13/2011	Nalini Ananthamurthy (na	Work Offline	04/13/2011 10:29:44	MTG	In a Meeting	N/A
04/13/2011	Nalini Ananthamurthy (na	Work Offline	04/13/2011 11:15:03	AgentRelogin	Agent Relogin	N/A
04/13/2011	Nalini Ananthamurthy (na	Work Offline	04/13/2011 11:15:53	AgentRelogin	Agent Relogin	N/A
04/13/2011	Nalini Ananthamurthy (na	Available	04/13/2011 11:16:19	N/A	N/A	N/A
04/13/2011	Nalini Ananthamurthy (na	Busy	04/13/2011 11:17:06	N/A	N/A	80
04/13/2011	Nalini Ananthamurthy (na	Reject Interaction	04/13/2011 11:17:17	EM	Email Completion	80
04/13/2011	Nalini Ananthamurthy (na	Work Offline	04/13/2011 11:17:17	N/A	N/A	N/A
04/13/2011	Nalini Ananthamurthy (na	Available	04/13/2011 11:17:49	N/A	N/A	N/A
04/13/2011	Nalini Ananthamurthy (na	Busy	04/13/2011 11:17:49	N/A	N/A	81
04/13/2011	Nalini Ananthamurthy (na	Reject Interaction	04/13/2011 11:17:54	OBC	Outbound call in progress	81

- **Agents: Time on Break/Offline with status codes**: The report indicates how an agent spends time on each task while working offline or on a break. The report summarizes information on time spent on each status code by status, by agent, and by date.

Agents: Time on Break/Offline with status codes
Period from: 07/18/2007 to 07/18/2007
Granularity: day

Period	Agent (Username)	Working offline				Break			
		Check Tickets		Personal Phone Call		Lunch		Meeting	
		Time	%	Time	%	Time	%	Time	%
07/18/2007	beatrice (bea)	2:11:15	82.8%	0:27:12	17.2%	0:18:20	25.3%	0:54:08	74.7%
07/18/2007	cyril (ck)	1:45:08	68.6%	0:48:01	31.4%	1:02:12	34.0%	2:00:59	66.0%
07/18/2007	giles (gillesg)	0:37:01	77.7%	0:10:39	22.3%	0:29:48	13.4%	3:12:29	86.6%
	Day Sub Total	4:33:24	76.1%	1:25:52	23.9%	1:50:20	13.4%	6:07:36	86.6%
	Grand Totals	**4:33:24**	**76.1%**	**1:25:52**	**23.9%**	**1:50:20**	**13.4%**	**6:07:36**	**86.6%**

For example, if agent Beatrice spent 2:11:15 checking tickets and 0:27:12 attending personal phone calls while working offline, the report indicates Beatrice spent 82.8% of her total working offline time checking tickets, and 17.2% for personal calls. The report also indicates the total time spent by status code for all agents included in the report.

Report on Transaction Codes

Transaction codes offer a means to set calling line identifier (caller ID), and to apply call disposition to inbound as well as outbound interactions. Each inbound or outbound interaction in a call centre has some purpose and disposition. Transaction codes can be defined to collect call disposition information from the agents at the time of the call, and supervisors can report on this information for analysis and to determine further processing.

Your contact centre administrator can create customized transaction codes in Configuration Manager if the Hosted Contact Centre tenant includes the optional transaction codes feature.

How do Agents use Transaction Codes?

During the processing of an interaction, a transaction code list is presented to an agent on Agent Console under the following circumstances:

- The agent is a member of the group assigned with the code list.
- The agent is a member of the queue/s assigned with the code list/s.

From the presented code list, an agent selects transaction codes:

- before initiating the call.
- during the call.
- at the end of the call during post-processing.

An agent assigned to an outbound calling line identifier code list is presented with the list before initiating an outbound call. The agent must choose a code before dialing. The phone number associated with the selected code sets the caller ID to the call.

An agent assigned to a call disposition list is presented with the code list during an interaction. The agent may select and save one code or multiple codes from a list anytime during the interaction or post-processing. When an agent is a member of the group or queue assigned with multiple lists, all lists are presented to the agent in separate tabs when they accept a call. The agent may select and save codes from multiple lists, and the selected codes appear in historical reports.

The following table lists the uses of transactions codes with corresponding examples:

Reasons for using transaction codes	Examples of transaction codes
State the purpose of an interaction	▪ Sales Call ▪ Service Call ▪ Support Call
Indicate the outcome of an interaction	▪ Prospect Interested – Call Back ▪ Prospect not Interested – Do not Call Back ▪ Reached Voicemail – Try Again ▪ Faulty Number
Define Calling Line Identifier for an outbound call.	Kids Zone - Kids Entertainment Company EMAC - Credit Recovery Inc

How do Supervisors use Transaction Codes?

Supervisors generate historical reports to get call disposition information for analysis, and to determine the need for follow-up actions based on transaction codes. The following reports list transaction codes used during agent's interactions.

- **Agents: Detailed accepted transactions with wrap up codes**: This report lists wrap-up codes used by an agent during all of their inbound accepted interactions. Wrap-up codes indicate call disposition information. You may find multiple instances of the same call to indicate multiple wrap-up codes applied to the same call.
- **Agents: Detailed outbound transactions with wrap up codes**: This report lists dial codes as well as wrap-up codes. Dial codes are caller ID-related codes which appear before dialing the call. An agent can apply only one dial code to a call, whereas they can apply multiple wrap-up codes.

Agents: Detailed outbound transactions with wrap up codes
Period: 05/02/2011 - 05/02/2011
Granularity: day
Report Generated on: 05/02/2011 16:39:51

Period	Agent (Username)	Destination	Call Start Time	Call Duration	Transaction	Wrap Up		Dial	
						Code	Text	Code	Text
05/02/2011	John Doe	15106766000	05/02/2011 12:5	0:00:41	162	Int	ospect Interested	KZ	Kids Zone
05/02/2011	John Doe	12146234456	05/02/2011 13:0	0:00:20	163	NI	Not Interested	KZ	Kids Zone
05/02/2011	John Doe	14084214566	05/02/2011 13:0	0:00:43	164	NO	Do not call back	KZ	Kids Zone
05/02/2011	John Doe	13431212211	05/02/2011 13:0	0:00:24	165	S3	Payment sent	CR	EMAC-Credit
05/02/2011	Elaine Smith	13445656431	05/02/2011 13:0	0:00:46	166	S4	ospect Interested	KZ	Kids Zone
05/02/2011	Elaine Smith	15106116215	05/02/2011 13:2	0:00:28	169	WN	Wrong Number	CR	EMAC-Credit
05/02/2011	Elaine Smith	15102312211	05/02/2011 13:2	0:00:58	170	Int	Successful Sale	KZ	Kids Zone
05/02/2011	Ashley Bennette	14083454433	05/02/2011 13:2	0:04:55	171	PS	Payment sent	CR	EMAC-Credit
05/02/2011	Ashley Bennette	19212323344	05/02/2011 15:2	0:00:02	179	DI	Dispute	CR	EMAC-Credit
05/02/2011	Ashley Bennette	14152244323	05/02/2011 15:4	0:00:02	180	SS	Successful Sale	KZ	Kids Zone
05/02/2011	Ashley Bennette	14555434223	05/02/2011 16:3	0:00:22	181	NI	Not Interested	KZ	Kids Zone

- **Agents: Transactions grouped by wrap up codes**: This report groups transactions by wrap-up codes, by queue, by channel, by media, and by agent.

Agents: Transactions grouped by wrap up codes
Period from: 07/18/2007 to 07/18/2007
Granularity: day

Period	Agent (Username)	Media	Channel	Queue	Follow Up (002)				Call back (015)				N/A (N/A)			
					#	%	Time	%	#	%	Time	%	#	%	Time	%
01/27/2011	Agent Smith (pma)	Chat	Chat Channel	Support	12	36.36%	0:16:08	43.82%	14	42.42%	0:14:45	40.06%	7	21.21%	0:05:56	16.12%
01/27/2011	Agent Smith (pma)	Email	wpj1@contactual.com	Support Email	24	32.43%	0:28:40	26.67%	13	17.56%	0:12:14	11.38%	37	50.00%	1:06:35	61.95%
01/27/2011	Agent Smith (pma)	Email	wpj2@contactual.com	Helpdesk Email	24	32.43%	0:41:49	32.50%	13	17.56%	0:09:01	7.01%	37	50.00%	1:17:51	60.50%
01/27/2011	Agent Smith (pma)	Email	wpj3@contactual.com	Sales Email	4	66.66%	0:03:57	80.34%	2	33.33%	0:00:58	19.66%	0	0.00%	0:00:00	0.00%
Agent Sub Total					64	34.22%	1:30:34	32.59%	42	22.46%	0:36:58	13.30%	81	43.32%	2:30:22	54.11%
Day Sub Total					64	34.22%	1:30:34	32.59%	42	22.46%	0:36:58	13.30%	81	43.32%	2:30:22	54.11%
Grand Totals					64	34.22%	1:30:34	32.59%	42	22.46%	0:36:58	13.30%	81	43.32%	2:30:22	54.11%

According to the sample report shown above, on 1/27/2011, agent Smith processed 12 Follow-up chats, 14 Call back chats, and 7 chats with undefined wrap-up codes, totaling 33 chats for the Support queue. The respective percentage values are 36.36%, 42.42%, and 21.21%. Agent Smith spent 0:16:08 on 12 chats, 0:14:45 to process 14 chats, and 0:05:56 to process other chats, accounting to a total of 0:36:49 minutes. Accordingly, the % values by wrap-up code are 43.82% for follow-up chats, 40.06% for Call back

chats, 16.12% on other chats. Additionally, Agent Smith processed emails from three other queues; Support Email, Helpdesk Email, and Sales Email.
The report also indicates Agent Smith processed a total of 64 follow-up interactions (Chat and Email), 42 Call back interactions, and 81 interactions with undefined wrap-up codes, with the respectively percentages of 34.22%, 22.46%, and 43.32%. Similarly, the total time spent is indicated. You can further customize the report to include data about any number of agents for a particular day or date range.

Report on Campaigns

On initiating a campaign, campaign calls are offered to agents for processing. As a supervisor, you may monitor and control these campaigns. You can generate historical reports to get information on campaign statistics for analysis and to determine the need for follow-up actions, based on transaction codes, and for further recycling of the campaigns.

If your Hosted Contact Centre tenant includes the optional Dialer feature, your contact centre administrator is able to set up the Dialer functionality and create campaigns.

You can generate reports of the campaigns you supervise. The new campaign filter allows you to filter the report data by selecting the desired campaigns. The following reports provide exclusive details about new, running, and completed campaigns.

Campaign Details

This report provides information about campaigns including campaign name, status, start and end time, total number of records processed, retry properties, and statistics of calls processed, based on the wrap-up codes.

Campaigns: Campaign Details

Campaign Name	Enabled	Status	# Of Records	# Of Completed Records	Caller ID	Queue	Scheduled Start & End Time		Actual Start & E	
							Start Time	End Time	Actual Run Time	Actu T
Lead for Year 2011	Yes	New	1340	0	14082006001	Dialer queue	2011/2/13 09:00:00	2011/2/18 17:00:00		
Account for Year 2010	Yes	Completed	1000	1000	14082006001	OutDial queue	2010/10/08 09:00:00	2010/11/18 17:00:00	2010/10/08 09:00:00	201 1
Grand			2340	1000						

Campaign Record Details

This report details each campaign record providing information on the status of each call, phone list available for each record, transaction information, the phone number called previously, time the call was completed, disposition action, wrap up code, and more. You can select a single campaign or multiple campaigns for reporting.

Campaigns: Campaign Record Details

Record ID	Phone List	Status	Status Code	External Transaction Data	Completion Timestamp	Agent (Username)	Last Trans Time	Last Calling #
0QC000000kzX7uMAE	(033) 452-1299	Completed	Skipped	[Company|Blues Entertainment Corp.][Phone|(033) 452-1299]	2011/2/12 09:30:30	Agent Smith (aSmith)	2011/2/12 09:30:30	
0QC000000kzX7zMAE	(626) 440-0700	Completed		[Company|Highland Manufacturing Ltd.][Phone|(626) 440-0700]	2011/2/12 09:45:00	Joe Doe (jDoe)	2011/2/12 09:40:00	6264400700

Campaign Transaction Details

This report includes transaction details for each call, such as the processing time for each transaction, post processing time, and total processing time, in addition to the campaign record details.

Campaigns: Campaign Transaction Details

Transaction	Wrap Up		Disposition Action Code	Called Number	External Transaction Data	Total time processing transaction	Total time on post processing	Total time processing + post processing transaction	
	Code	Text							
1007	002	Follow Up	None	16502928610	[Company|Blues Entertainment Corp.][Phone|(033) 452-1299]	0:10:12	0:01:25	0:11:37	S2009
1010	015	Call back	None	15109942033	[Company|Highland Manufacturing Ltd.][Phone|(626) 440-0700]	0:07:26	0:00:14	0:07:40	

Monitor Agents, Queues, Groups, and Campaigns

Supervisors can use the Monitoring tab in Supervisor Console to review and actively monitor agents, queues, groups, and campaigns.

Real-time monitoring and reporting provides critical contact centre metrics and gives supervisors an ability to manage their call centre agent teams effectively. Authorized supervisors can monitor live agent and customer interactions by barging in.

Authorized supervisors are able to see in real time the status of their contact centre through a web browser; their Service Levels vs. Goal, the number of calls in progress, the number of calls waiting, the longest-waiting interaction per queue or skill, and real-time agent status graphs indicating the percentage of time in various states, such as on call, waiting, wrap up, on break, and more.

Supervisors have the ability to monitor only a given group of agents and queues.

Benefits

- Complete visibility into your call centre operations
- Customer service quality assurance

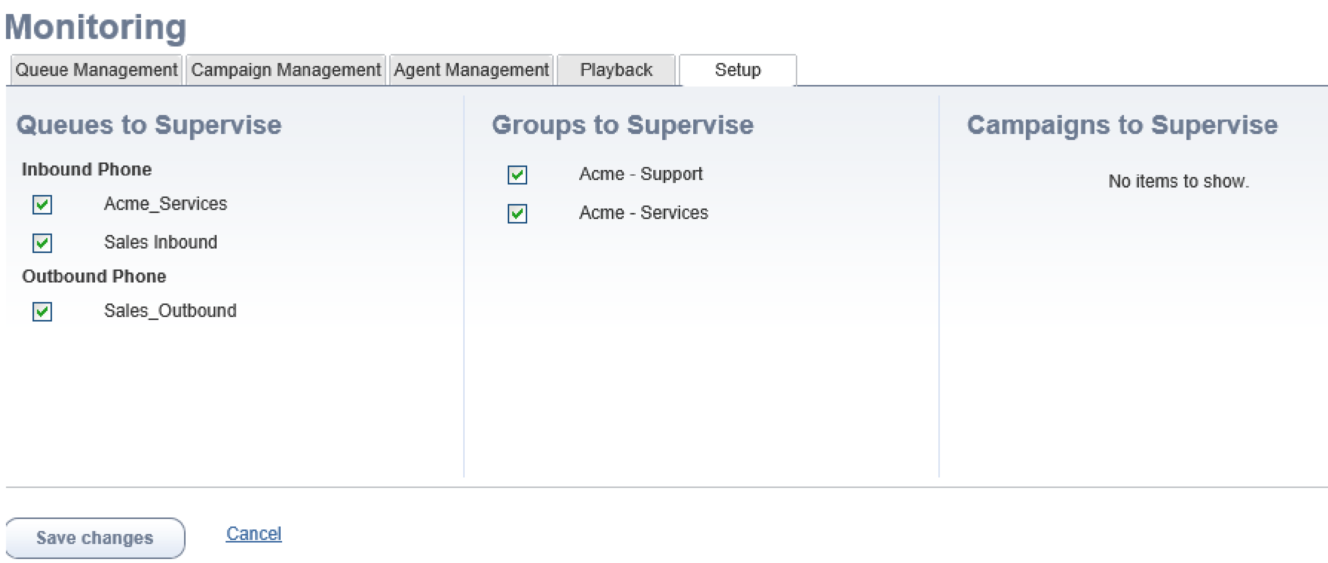
Set up Monitoring

You can closely monitor the activity level of queues and agent groups you supervise in real time. Your contact centre administrator defines your supervisory assignments. You have the flexibility to opt in and out of these assigned queues, groups, and campaigns.

To set up queues and groups to monitor:

1. Log in to Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.
   The **Monitoring** window opens.

   Note: Supervisors can open the Monitoring window in a separate pop-up window. Click the arrow on top-right corner of the Agent Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Agent Console, click the arrow again.
3. Click the **Setup** tab.
   Supervisor Console lists the queues and groups you are allowed to monitor.



4. Select the queues and groups you want to monitor, then click **Save Changes**.
   The Supervisor Console applies your settings.

Monitor Queues

Monitoring a queue allows you to obtain the metrics of each queue from the beginning of the day, for the last 30 minutes, or in real time. For each queue supervised, you can obtain statistics on the:

- Number of interactions that entered the queue
- Number of interactions accepted by agents
- Number of abandoned interactions
- Average wait time

- Average processing time
- Targeted service level
- Current service level

The following table lists and describes the data available in Queue Management:

Field	Description
Time Zone	Select from the available time zones when monitoring queues and agents as a supervisor. The Time Zone appears under **From beginning of day** only.
Queue	Lists all the queues monitored by you categorized by media.
#Entered	Number of interactions that entered the queue from the beginning of the day, or in the last 30 minutes.
#Accepted	Number of interactions accepted by agents the queue from the beginning of the day, or in the last 30 minutes.
#Abandoned	Number of interactions abandoned. ▪ An abandoned interaction is an inbound phone call, or a chat that enters the queue but is not accepted resulting in the customer terminating the interaction. ▪ An email is considered abandoned when an agent pulls emails but deletes them before opening. An abandoned interaction may also result from a faulty IVR flow.
Average Wait	Average waiting time for an interaction before being processed.
Average Processing	Average time taken to process an interaction from the time it is accepted until post processing.
SLA - Activity	The current activity level for the queue.
SLA - Target	The targeted service level for the queue.
SL Wait Time	the Service Level time limit before which the targeted percentage of interactions should be processed.
Busy	Number of interactions currently being processed by agents. This is applicable to real time statistics only.
Waiting	Number of interactions waiting in each queue to be processed.
Longest Wait	The longest waiting time for an interaction.

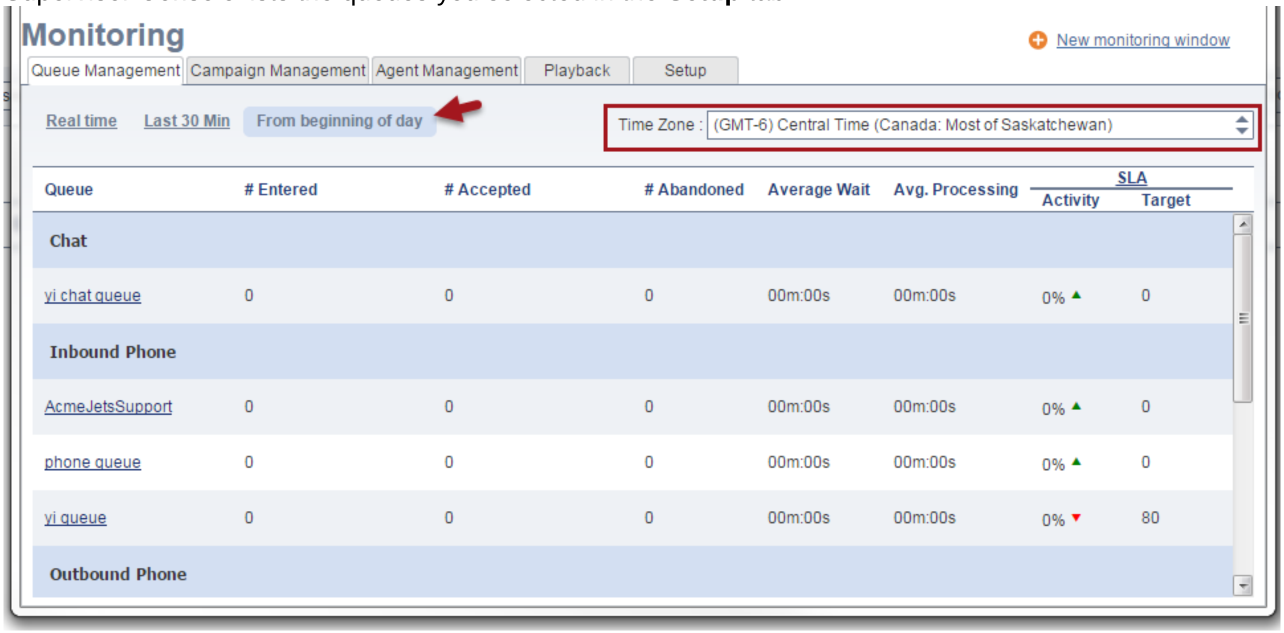
An abandoned interaction is an inbound phone call, or a chat that enters the queue but terminated by the customers before being accepted by an agent. An email is considered abandoned when an agent pulls emails but deletes them before opening. An abandoned interaction may also result from a faulty IVR flow. The Queue Management tab in the Monitoring window provides statistics on the abandoned interactions in the last 30 minutes or from the beginning of the day for each queue.

To monitor a queue:

1. Log in to the Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**.
   If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs. The Monitoring window opens.

   Note: Supervisors can open the Monitoring window in a separate pop-up window. Click the arrow on top-right corner of the Agent Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Agent Console, click the arrow again.

3. Go to the **Queue Management** tab.
   Supervisor Console lists the queues you selected in the **Setup** tab.



4. Select **Real time**, **Last 30 Min**, or **From beginning of day**.
   Each option provides a set of monitoring options.
5. You can choose a different **Time Zone** if you have selected **From beginning of day**.
6. Click a queue name to display the agents for that queue.
7. In the list of agents assigned to a queue, click an agent to display a summary of that agent's activity such as skill level, current status, and time on status.

Notes:
-The monitoring data is updated even when the supervisor status is **Break**.
-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Monitor Campaigns

Supervisors assigned with monitoring privileges can control and monitor campaigns by tracking the real-time status of each campaign. The Campaign Management tab also provides an overview of campaign calls.

Based on your privileges set by the administrator, you can:

- **Monitor campaigns**: Allows you to track real-time statistics of campaigns and view campaign details, such as start and end time, daily calling schedule, and Retry attempts.
- **Control Campaigns**: Allows you to start, pause, purge, and end campaigns.

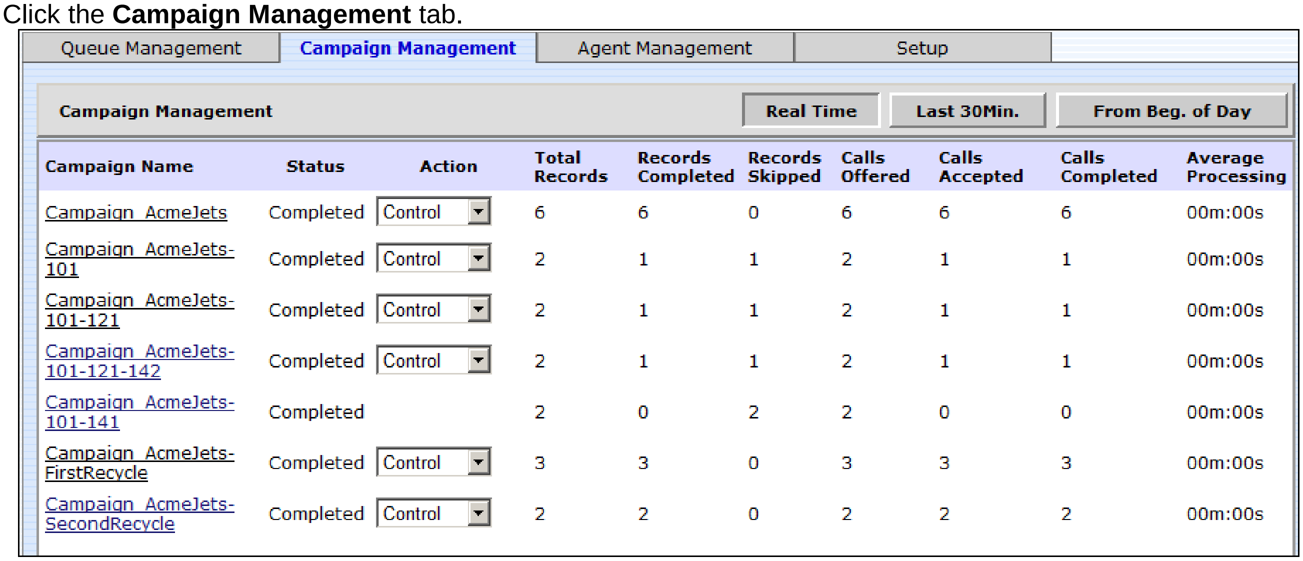
To access the Campaign Management tab:

1. Log in to the Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.

2. From the Control Panel menu, select **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.
   The Monitoring window opens.

   Note: Supervisors can open the Monitoring window in a separate pop-up window. Click the arrow on top-right corner of the Agent Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Agent Console, click the arrow again.

3. Click the **Campaign Management** tab.



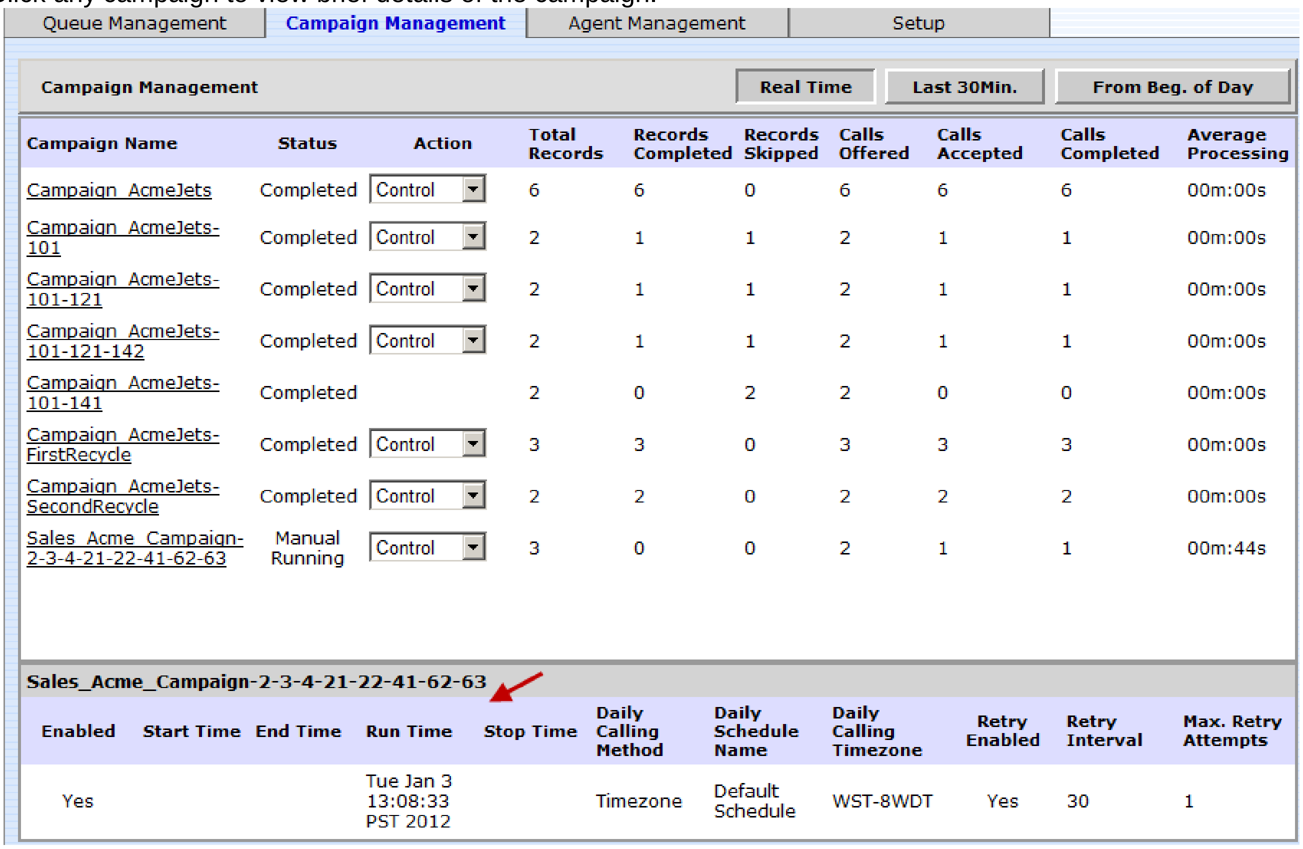
The **Campaign Management** tab presents the following information about campaigns:

Campaign Details	Description
Campaign Name	Campaign name defined by the administrator
Status	Campaign status indicates if the campaign is completed or running.
Action	Action allows you to start, schedule, or stop a campaign. ▪ **Start**: Starts a campaigns immediately. ▪ **Schedule**: Starts a campaign on schedule defined by the administrator. ▪ **Stop**: Stops a campaign immediately.
Total Records	Total number of records fetched by the campaign manager from the data source.
Records Completed	Total number of records completed by the campaign. A record is considered completed if calls generated for the record are accepted and completed by one or more agents, and no more retries are scheduled, or the number of retry attempts has reached the maximum allowed.
Records Skipped	A record is considered skipped if a call generated for the record is skipped by an agent. There will be no more call generated by the record.
Calls Offered	Total number of calls been offered to an agent. If the same call/interaction is offered to multiple agents multiple times, the count of calls offered does not increase, since the offer event belongs to the same call.
Calls Accepted	Total number of calls accepted by agents.
Calls Completed	Total number of calls accepted and processed by agents. This statistic includes retry calls.
Average Processing	Average time for completing a call, including the post-processing time.

4. Click one option:

- **Real Time** for real time status and statistics of campaigns.
- **Last 30 Min** for status and statistics of campaigns in the last 30 minutes.
- **From beginning of day** for status and statistics of campaigns from the start call time of the campaign for the day.

5. Click any campaign to view brief details of the campaign.



Queue Management | Campaign Management | Agent Management | Setup

Campaign Management — Real Time | Last 30Min. | From Beg. of Day

Campaign Name	Status	Action	Total Records	Records Completed	Records Skipped	Calls Offered	Calls Accepted	Calls Completed	Average Processing
Campaign_AcmeJets	Completed	Control	6	6	0	6	6	6	00m:00s
Campaign_AcmeJets-101	Completed	Control	2	1	1	2	1	1	00m:00s
Campaign_AcmeJets-101-121	Completed	Control	2	1	1	2	1	1	00m:00s
Campaign_AcmeJets-101-121-142	Completed	Control	2	1	1	2	1	1	00m:00s
Campaign_AcmeJets-101-141	Completed		2	0	2	2	0	0	00m:00s
Campaign_AcmeJets-FirstRecycle	Completed	Control	3	3	0	3	3	3	00m:00s
Campaign_AcmeJets-SecondRecycle	Completed	Control	2	2	0	2	2	2	00m:00s
Sales_Acme_Campaign-2-3-4-21-22-41-62-63	Manual Running	Control	3	0	0	2	1	1	00m:44s

Sales_Acme_Campaign-2-3-4-21-22-41-62-63

Enabled	Start Time	End Time	Run Time	Stop Time	Daily Calling Method	Daily Schedule Name	Daily Calling Timezone	Retry Enabled	Retry Interval	Max. Retry Attempts
Yes			Tue Jan 3 13:08:33 PST 2012		Timezone	Default Schedule	WST-8WDT	Yes	30	1

Notes:
-The monitoring data is updated even when the supervisor status is **Break**.
-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Monitor Agents

As an authorized supervisor, you can track agent status in real time, for the last 30 minutes, or from the beginning of the day. Moreover, you can barge into active calls between agents and customers (Agent Whisper), or eavesdrop on a conversation between an agent and a customer (Automatic Monitoring). The Agent Management tab in the Monitoring window provides the following options for monitoring:

- View the current status, time in the status, duration since logged in, time spent processing interactions, and more.
- Access real-time agent status graphs indicating the percentage of time in various states, such as on call, waiting, wrap up, on break, and more.
- Monitor live agent and customer interactions by barging into calls.

- Monitor agent performance by accessing the audio recordings of the agent's phone interactions.

The following table summarizes the data available for monitoring agents in real time:

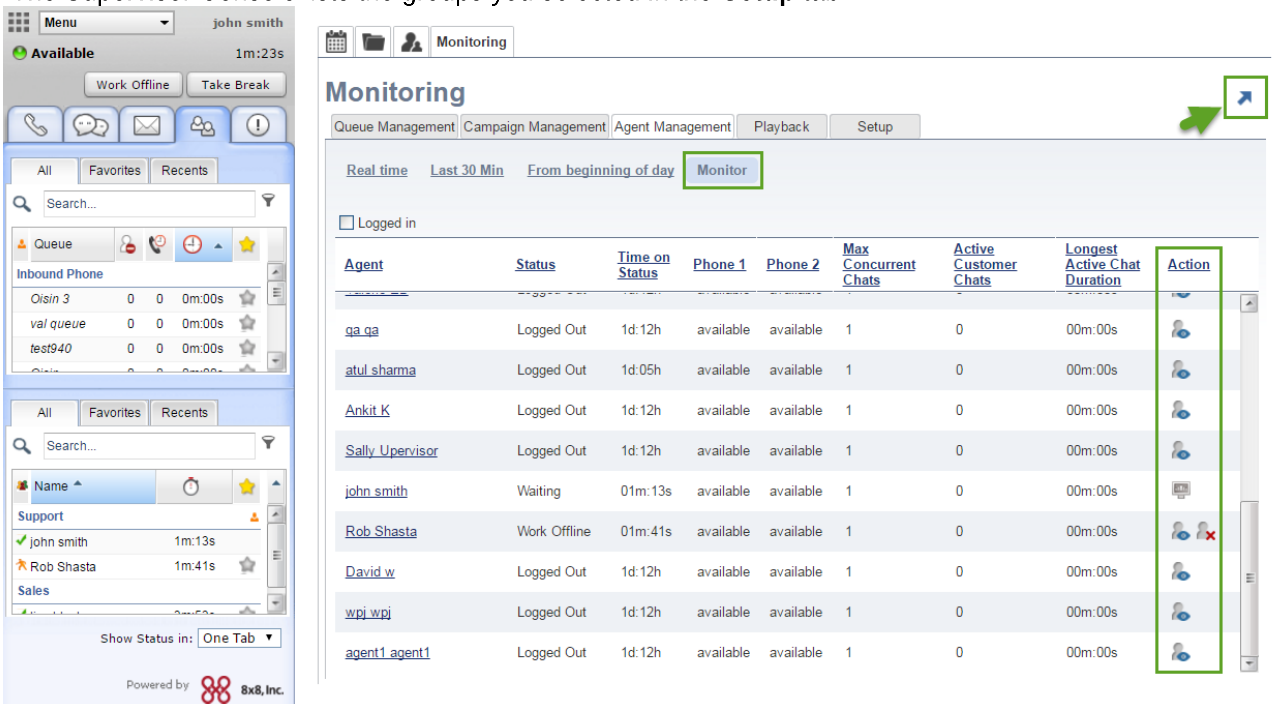
Agent Management	Description
Time Zone	Select from available time zones when monitoring queues and agents as a supervisor. The Time Zone appears under **From beginning of day** only.
Agent	Lists all the agents monitored by you.
Current Status	Current status of agents.
Status Code	Status code indicating the reason for current status. For example: Working offline to wrap up case work. Available if your contact centre subscribes to status codes.
Time on Status	The duration in the current status.
Phone Line 1	Shows if an agent is on the live call on Phone line 1.
Phone Line 2	Shows if an agent is on the live call on Phone line 1.
Active Queues	Number of queues an agent is active.
Last Login	The time at which an agent logged in. Shown in tenant time zone.
Total Time Login	Total duration of login since the beginning of the day by tenant time zone.
Total Time Transaction	Total time spent on handling interactions.
Maximum Concurrent Chats	Shows the maximum concurrent chats allowed for an agent.
Active Customer Chats	Shows the number of active chats for an agent.

To monitor agents:

1. Log in to the Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.
   The **Monitoring** window opens.

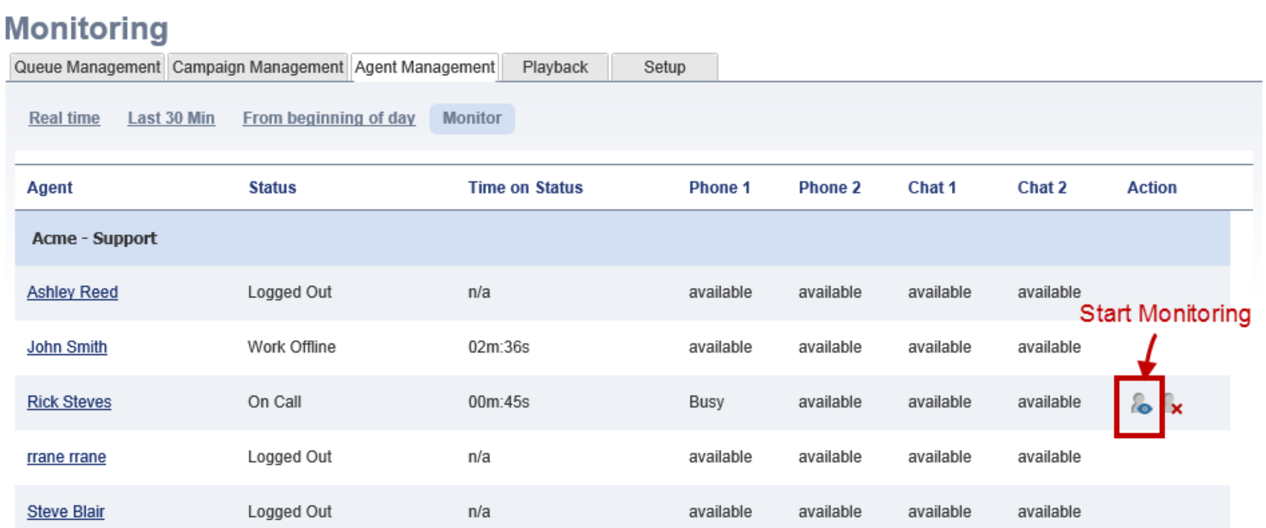
   Note: Supervisors can open the Monitoring window in a separate pop-up window. Click the arrow on top-right corner of the Agent Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Agent Console, click the arrow again.

3. Click the **Agent Management** tab.
   The Supervisor Console lists the groups you selected in the **Setup** tab.



4. To begin monitoring, click **Monitor** in the header area.
   For agents on live calls, is enabled under the **Action** column.

5. Select an agent you wish to monitor and click under the **Action** column.

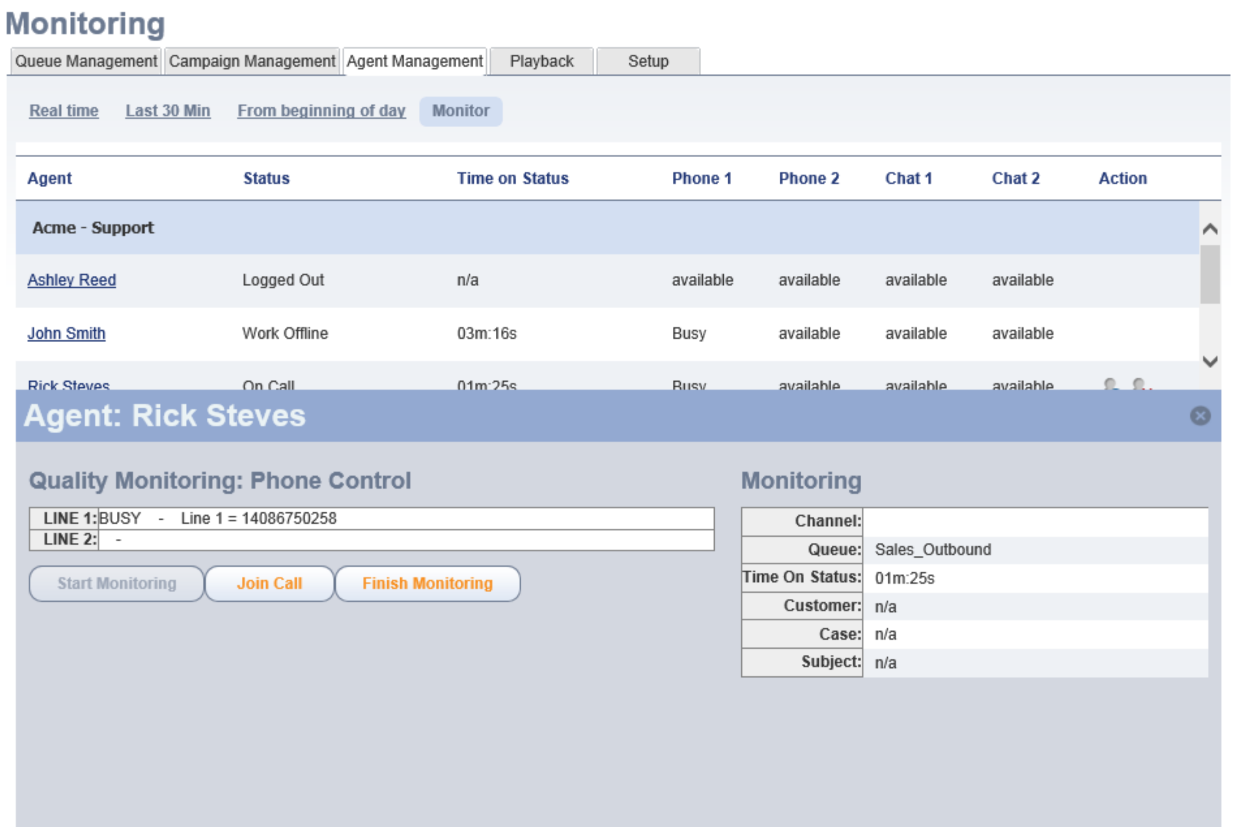


   OR
   Click an agent's name to view the monitoring controls.

6. Click **Start Monitoring**.
   Your supervisor phone rings.

7. Accept the call to listen in.

8. Perform one of the following tasks:
   - To end monitoring the call, click **Finish Monitoring**.
   - To participate in the call, click **Join Call**. End the call when done.



Notes:
-The monitoring data is updated even when the supervisor status is **Break**.
-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Retrieve Agent Call Recordings

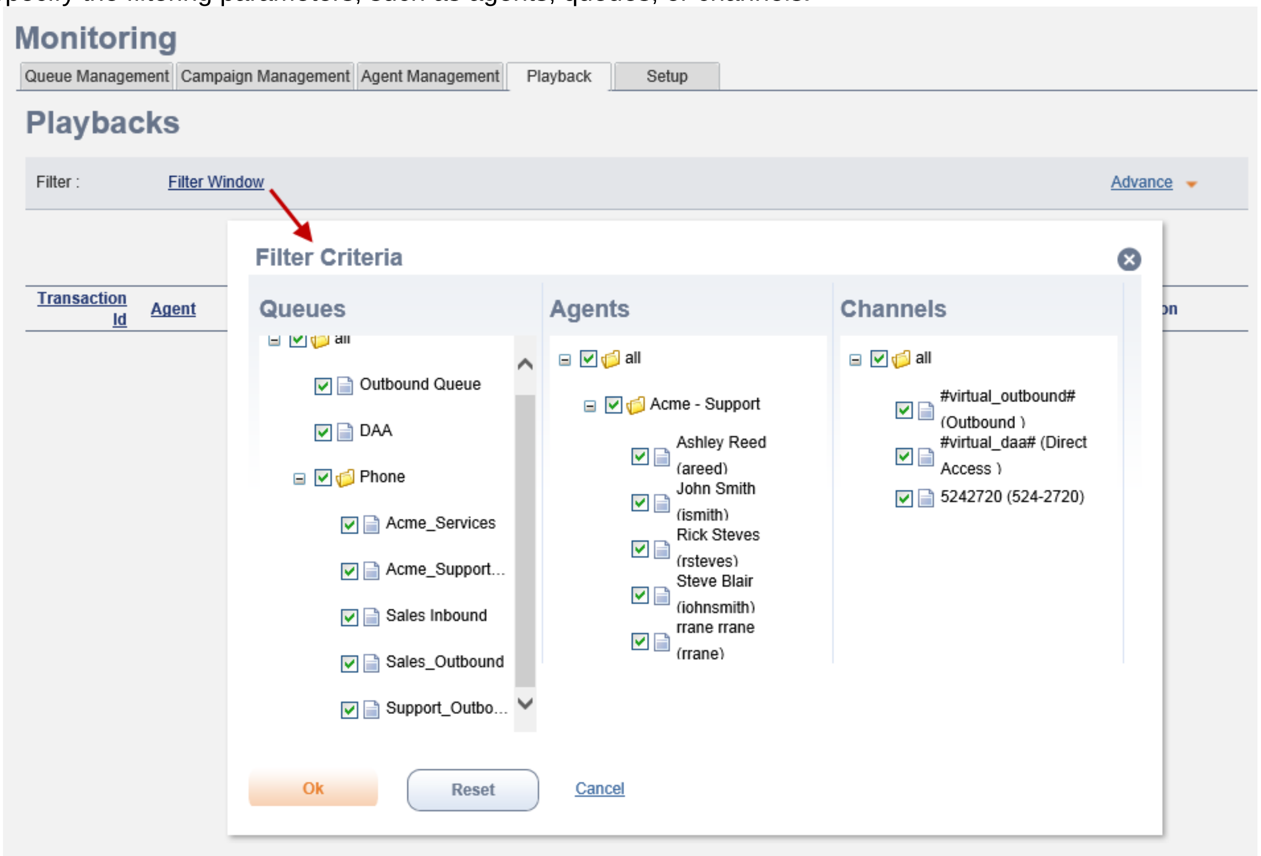
As a supervisor, you can listen in on active calls handled by agents you supervise. You can access and play back call recordings from the Playback tab. With the ability to filter and search, you can get to the call recording you are looking for quickly. Call recordings are displayed in graphical waveform to quickly view and navigate to specific areas of recorded conversation.

The advanced search allows you to look up recordings based on transaction ID, contact (phone number), start date, and duration. For example, you can search for all recordings specific to a customer in the last week.

To play call recordings:

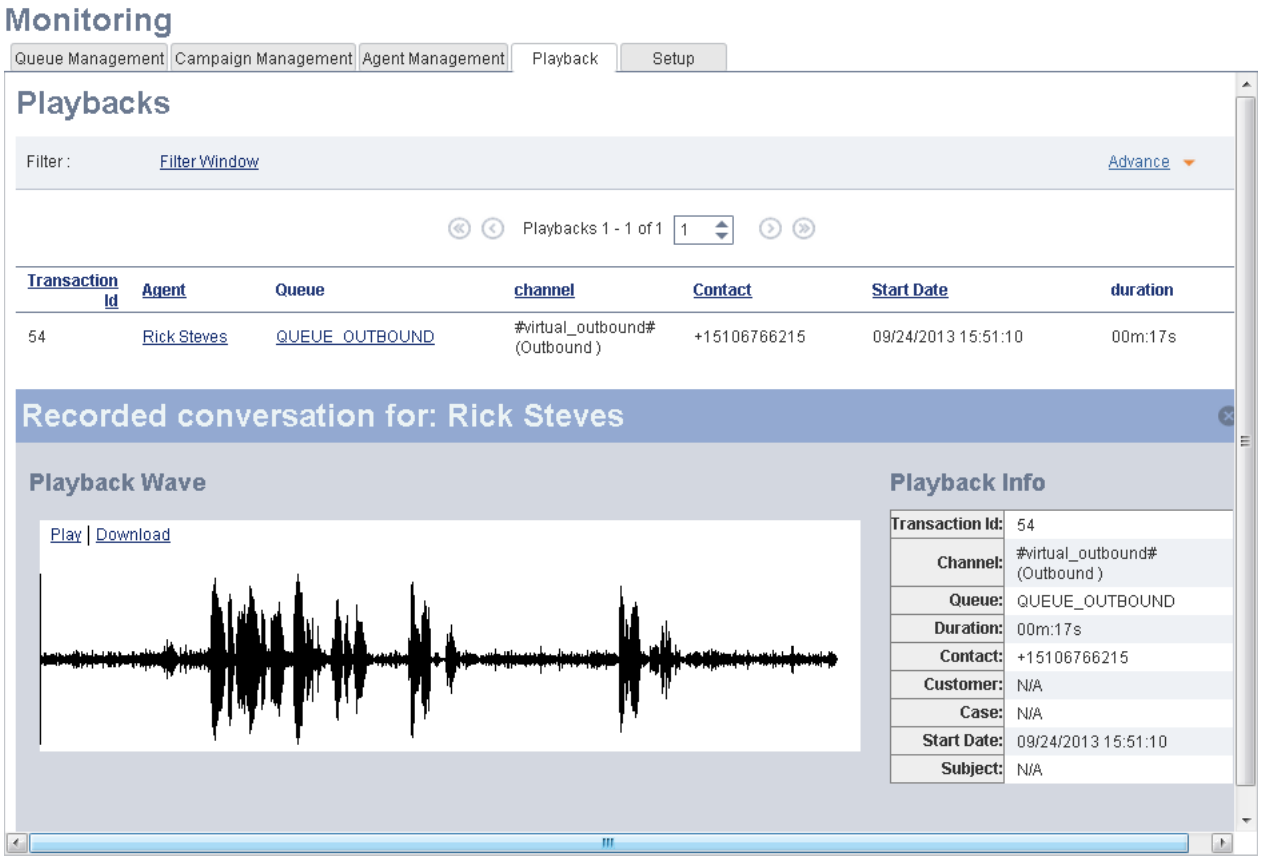
1. Click the **Playback** tab in the **Monitoring** window.
   A list of all call recordings shows.

2. To filter, click **Filter**.
3. Specify the filtering parameters, such as agents, queues, or channels.



4. To search, click **Search** and look up by transaction ID, contact (phone number), start date, and duration. For example, you can search for all recordings specific to a customer in the last week.

5. Click the desired recording for a waveform display. You can click on the waveform and navigate easily.



Note: Mouse-driven waveform display requires HTML5-compliant browsers such as Chrome and Firefox. Internet Explorer does not support browser-embedded playback.

Chat Recording

We offer supervisors the capability to access transcripts of chat conversations between agents and customers. Using the Monitoring privilege, supervisors can access internal (agent-to-agent) and external (customer-to-agent) chat transcripts. Hosted Contact Centre saves all chat messages automatically, and cannot be disabled.

Features

As a supervisor, you can:

- Access saved chat interactions using the **Monitoring > Playback** tab.
- Discern between internal and external records.
- Search chat records by specific data fields.
- Filter chat records by queue, agent, or channel.
- Sort the records by column headers.

- Select a different time zone to view the chat record. Ability to choose different time zones.
- Search for content within a chat record.
- Access transaction details, such as duration of chat, the channel and queue it was directed through, and more.
- Access pre-chat metadata (when available) for each interaction.
- Download the transcript.
- Pop out the chat transcript window from the **Monitoring** tab.

Limitations

Images shared during a chat are not saved while downloaded.

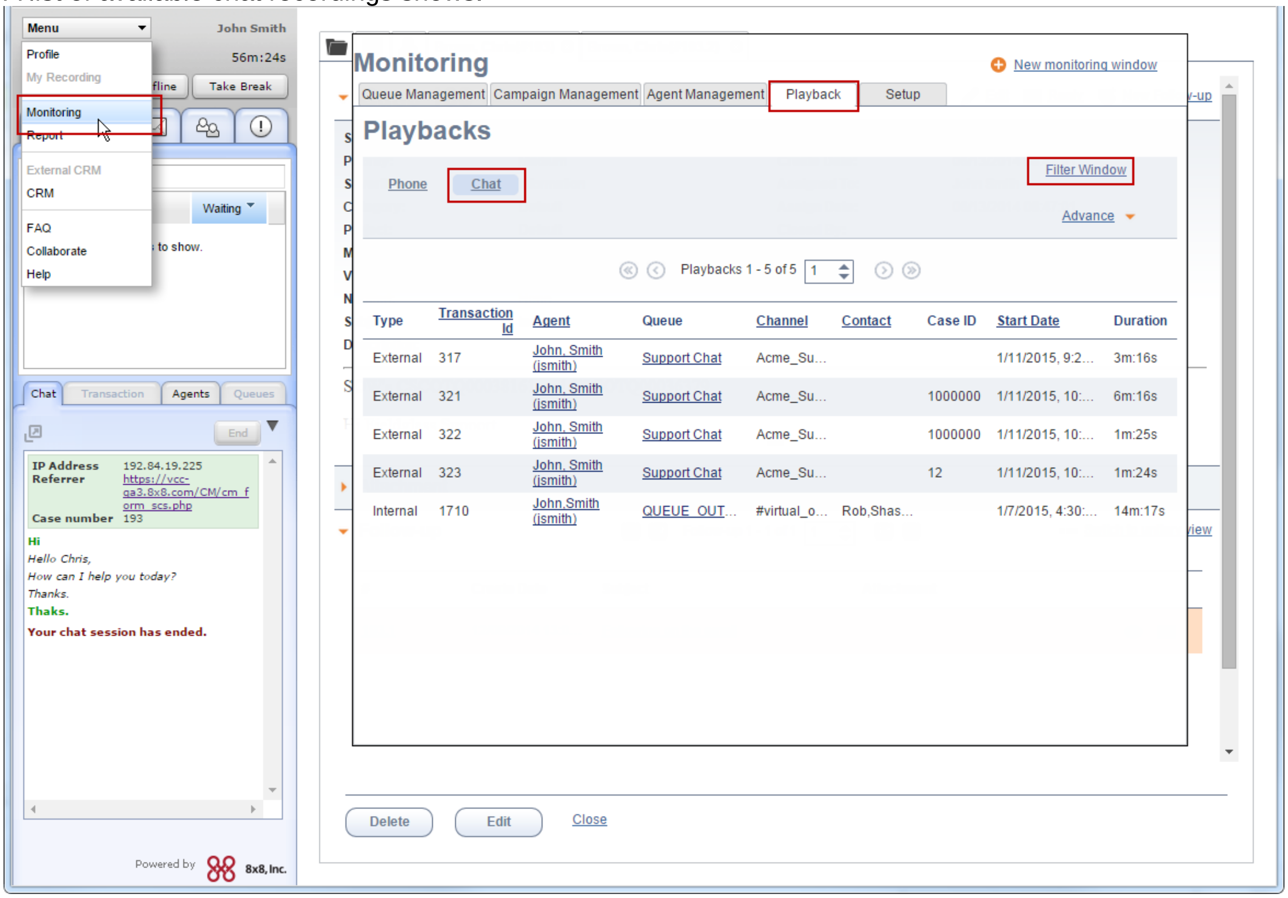
How to Access Chat Recordings

As a supervisor, you can log in to Agent Console, sort, search, and filter for desired chat recordings.

To view chat transcripts:

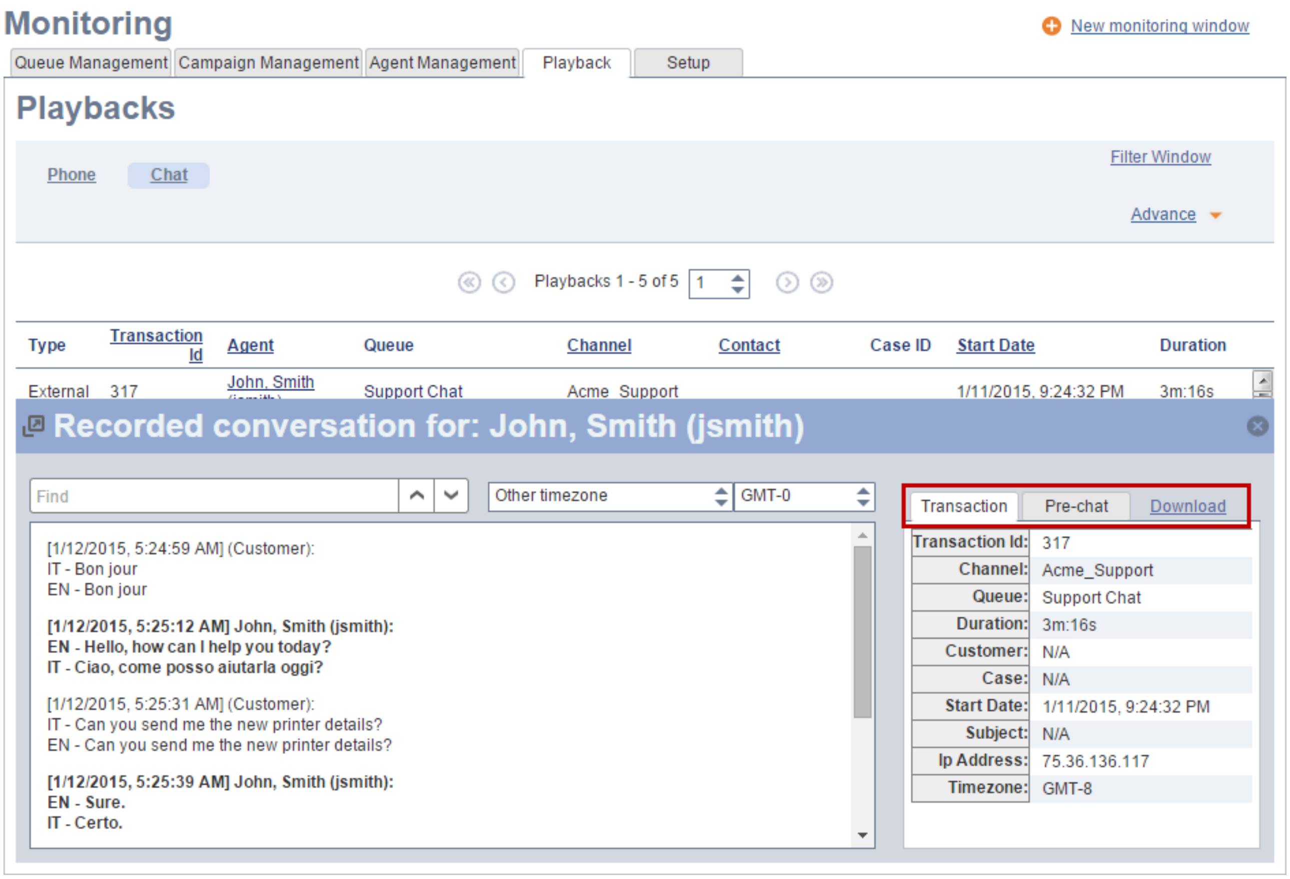
1. Log in to Agent Console.
2. From the Control Panel menu, select **Monitoring**.
3. In the **Monitoring** window, select the **Playback** tab.

4. Select **Chat** to access all chat recordings.
   A list of available chat recordings shows.



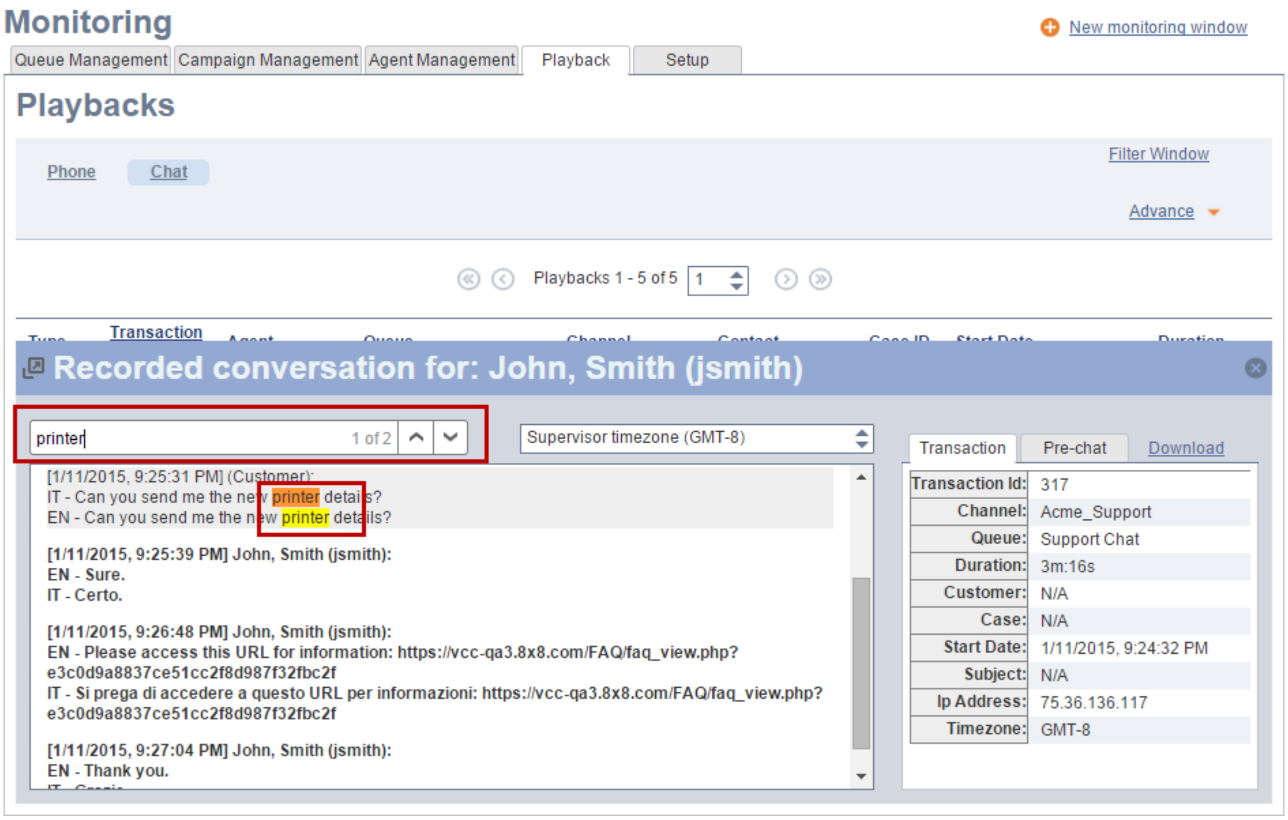
- To filter, click **Filter Window**. Select the desired filter criteria for queues, agents, and channels.
- To sort, click any desired column header. The list gets sorted alphabetically, numerically, or by date.
- For a custom search, use the **Advanced Search** option. Create a desired search query, and click **Search**.

5. Click the desired chat recording from the list to view the detailed transcript.



- To view the transaction details, click the **Transaction** tab on the right-hand side.
- To view the pre-chat metadata, click the **Pre-chat** tab. The tab shows only if the chat included a pre-chat form.
- To download the chat transcript, click **Download** on the right-hand side. It saves the transcript as a text file.

6. To search for a keyword within the transcript, enter the keyword in the search box. If found, all instances of the string are highlighted within the record.



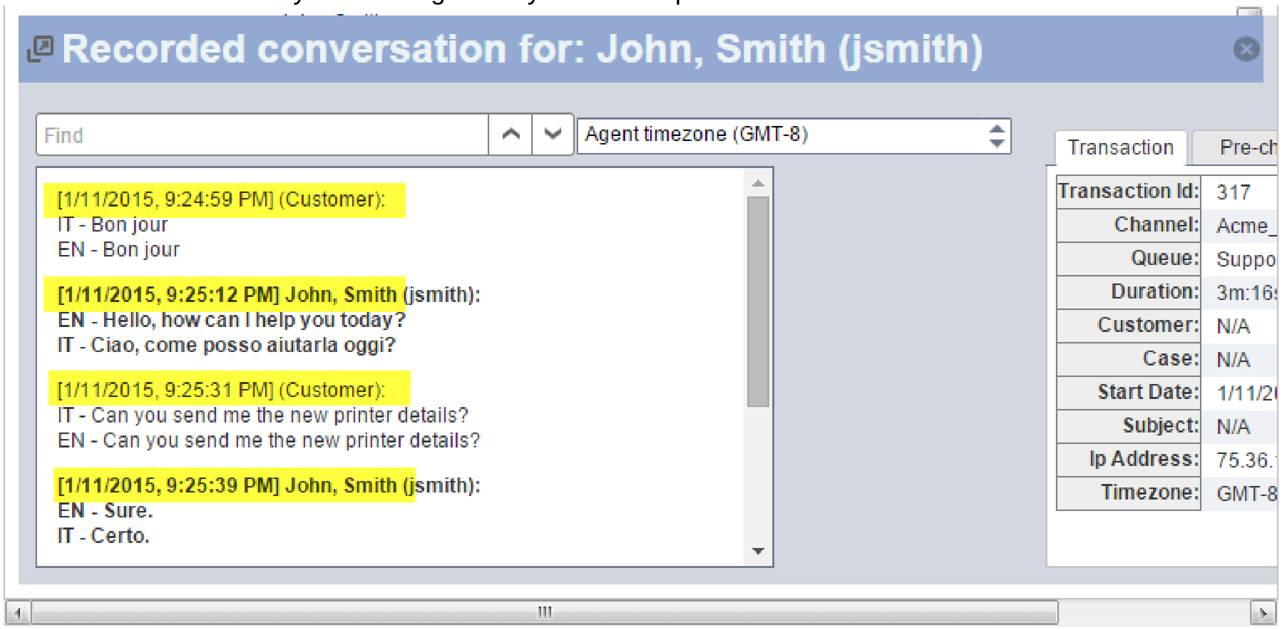
7. To pop out the chat recording window, click .

How to Select a Time Zone

By default, each chat recording is shown in the tenant time zone. You can select a time zone from the following choices:

- **Supervisor time zone**: Shows the chat time in the supervisor's time zone.
- **Contact time zone**: Shows the chat time in the contact's time zone.
- **Agent time zone**: Show the chat time in the agent's time zone.

- **Other time zone**: Allows you to change to any available option for GMT.

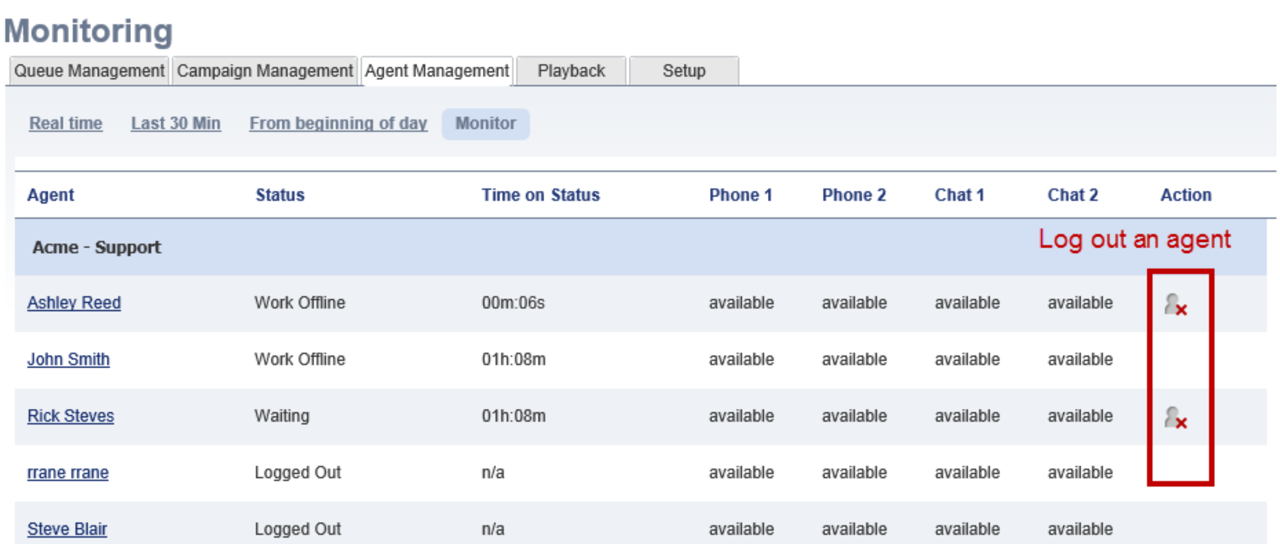


Log an Agent Out

If an agent forgot to log out at the end of the day, you can log the agent out of Agent Console using the Monitoring feature. You can log out only the agents supervised by you.

To log an agent out of Agent Console:

1. Log in to Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console log out feature.
2. Go to the **Agent Management** tab in the **Monitoring** tab.
3. Click **Monitor** in the header area.



In the list of agents, the Supervisor Console displays next to agents who are currently logged in.

4. Click next to the desired agent.
   Supervisor Console logs the agent out, and updates the agent's status to **Logged Out**.

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.