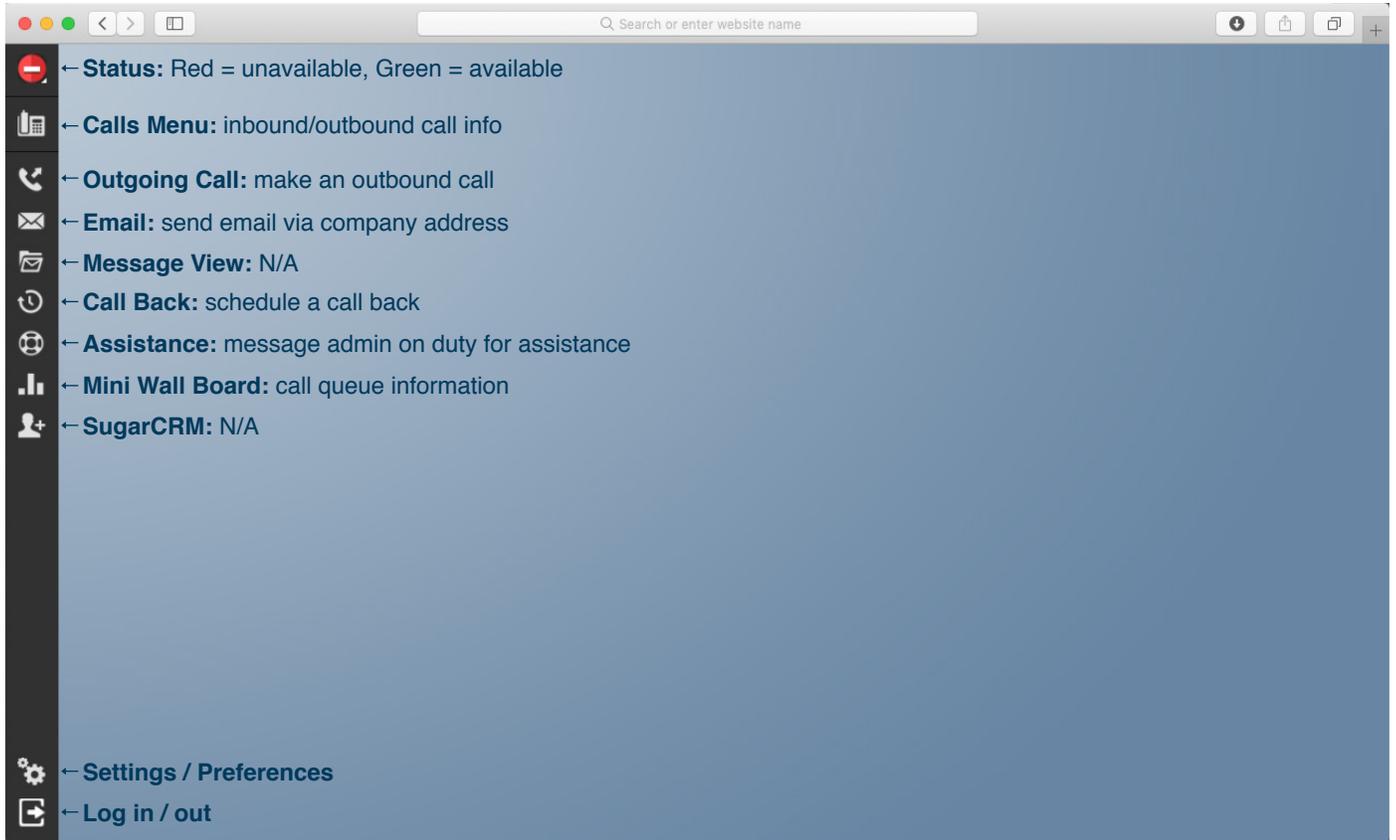




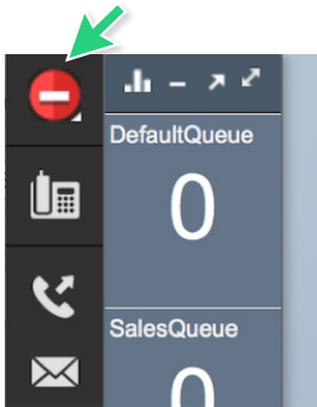
Contact Center Agent

OFFICIAL USER GUIDE

Home screen

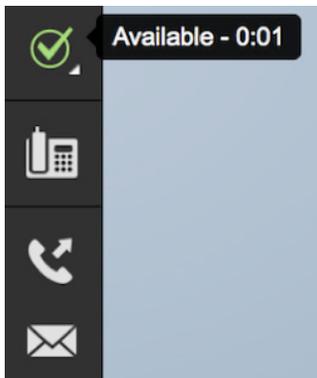


AVAILABLE / UNAVAILABLE

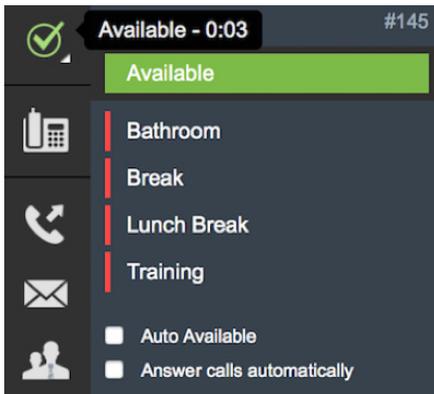


When you're on a call or doing wrap-up codes you will see the red minus sign (**unavailable**) as your status in the upper left corner.

Your status will always be **unavailable** when you first log in unless you have selected "auto available" in your preferences.

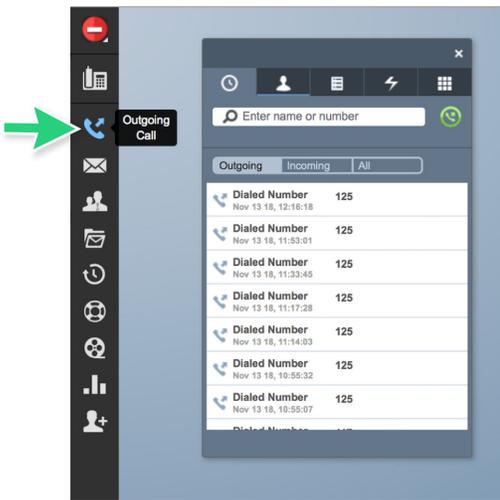


To go **available** click the red minus sign and a green check mark will appear. This means you're ready to take calls.



To go **unavailable** again, to say, go on a break – click the green check and a drop-down list of **unavailable** options will appear. These selections will allow the supervisor/admin to correctly see the hours worked throughout the day and when breaks were taken.

MAKING AN INTERNAL / EXTERNAL OUTBOUND CALL



Always dial out from inside this platform to ensure correct reporting data for your admin/supervisor.

Click the **outgoing call** icon.

Your dial pad/contact list will appear. You have four options for dialing:

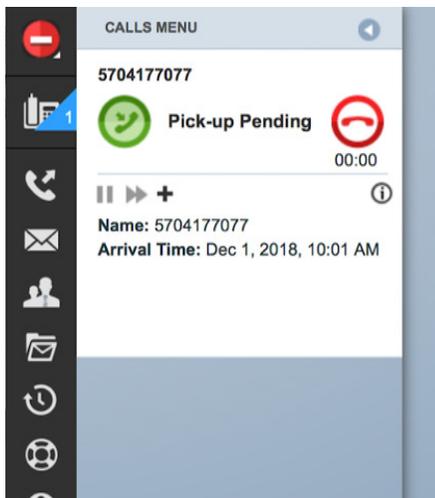


Enter the name or number and click the green phone icon.

Find them on the outgoing/incoming call list.

Find them on the users list if it's an internal call.

Use your dialpad to dial the number.



IMPORTANT PHONE FUNCTIONALITY

Once you click the green phone icon to place the outbound call, the contact center will alert your desk phone, it will start to ring, and you'll see this window on your screen.

You need to answer your desk phone to initialize the outbound call.

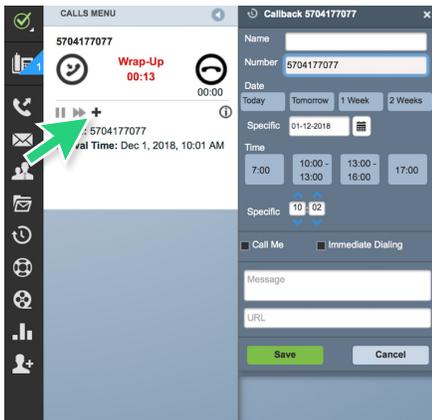
This is how the contact center and your desk phone connect to each other to gather information for the reports.

Keep in mind everything is monitored and reported within call center.

SCHEDULING A CALLBACK

You have two options for scheduling a callback:

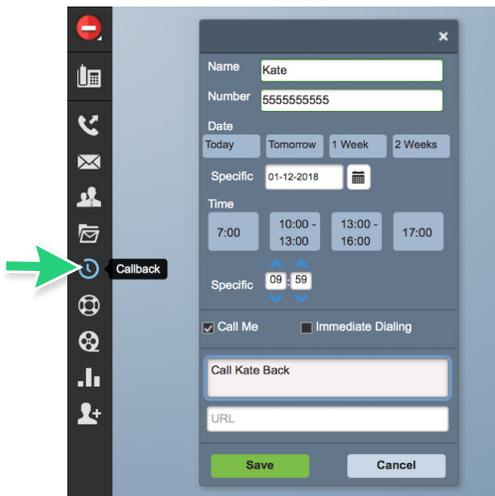
1. While on a call you can schedule a **callback** directly from the call itself.
2. You can select the **callback** icon from the menu and schedule the date/time you'd like to be alerted.



To schedule a callback while on a call:

Click the “+” icon on the calls menu and the round **callback** icon will appear. The **callback** window will open, and it will automatically copy and paste the number into the **callback** widget. From here, you need to:

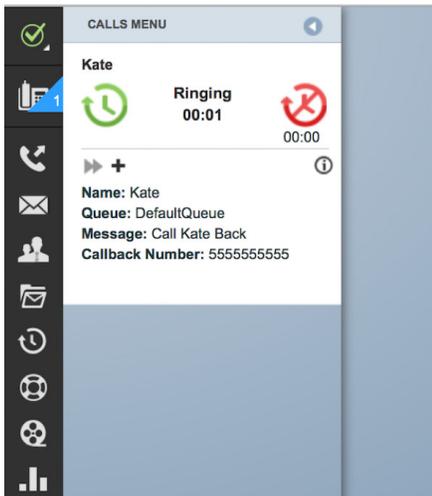
1. Include the name of the person needing a **callback**.
2. Pick a date and time. This can be a window of time, or a specific date/time.
3. If you are required to call this person back select the “call me” check box. Please remember that your status needs to be “available” in order for the **callback** to alert you.
4. If this is a call anyone can take within the queue then schedule the **callback** and include notes for the outbound dialer.



To schedule a callback from the menu:

1. Include the name and number of the person needing a **callback**.
2. Pick a date and time. This can be a window of time, or a specific date/time.
3. If you are required to call this person back select the “call me” check box. Please remember that your status needs to be “available” in order for the **callback** to alert you.
4. If this is a call anyone can take within the queue then schedule the **callback** and include notes for the outbound dialer.

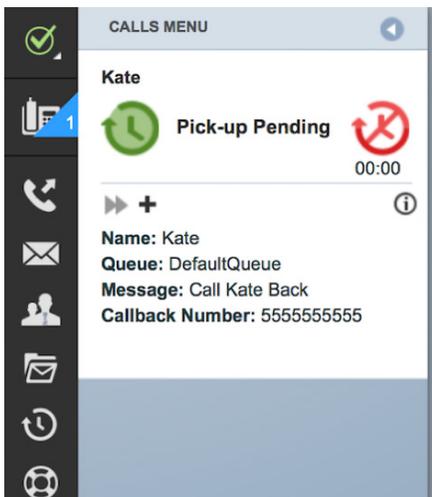
SCHEDULING A CALLBACK (CONT.)



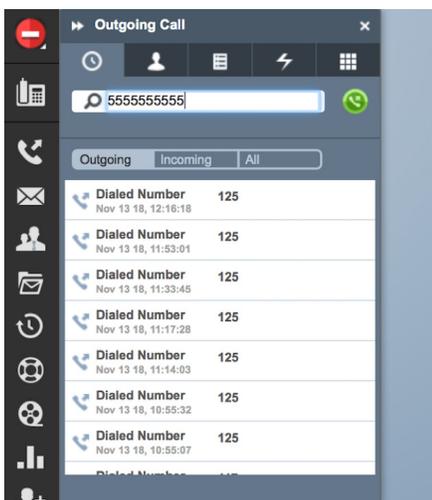
The callback process:

When it's time for a **callback** to occur, the call menu will pop out with the call information. Click the green **callback** icon and it will copy and paste the phone number into your dial pad.

*The **callback** feature is basically an alarm, much like you can set on your mobile phone to alert yourself of a task. Once the "alarm" pops up you do need to complete standard call out procedures.*



If you selected the "call me" option, and at your scheduled **callback** time you're unavailable, the call me option will wait until you are available again to give you your **callback** alert. If "call me" was not selected, an available agent at that time and date will receive the **callback** alert with your notes.



Once the number has been pasted in the outgoing call window, click the green phone icon to place the outgoing call.