Quick Start Guide

Virtual Contact Center Agent Console

Control Panel

Agent Status

<table>
<thead>
<tr>
<th>State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>Changing your state to Available indicates you are ready to accept an interaction*.</td>
</tr>
<tr>
<td>Busy</td>
<td>While processing an interaction, your status changes to Busy. Incoming interactions are blocked in busy state.</td>
</tr>
<tr>
<td>Post Processing</td>
<td>While wrapping up an interaction, your status changes to Post Processing. Incoming interactions are blocked in this state.</td>
</tr>
<tr>
<td>Working Offline</td>
<td>You are working, but not available for inbound interactions except direct agent calls and transferred calls.</td>
</tr>
<tr>
<td>Take Break</td>
<td>Changing your state to Take Break places you on break. Indicates you are logged in but not working. You must change your status to navigate in the application.</td>
</tr>
<tr>
<td>Log Out</td>
<td>Logs you out of the Agent Console</td>
</tr>
</tbody>
</table>

*An interaction is a call, a chat, an email, a voicemail handled by the Virtual Contact Center.

Control Panel Menu

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Profile</td>
<td>Define agent account settings</td>
</tr>
<tr>
<td>My Recording</td>
<td>Record custom messages to be played to callers</td>
</tr>
<tr>
<td>FAQ</td>
<td>Access the FAQ feature of your contact center to get answers for most frequently asked questions.</td>
</tr>
<tr>
<td>Collaborate</td>
<td>Connect to a customer computer remotely for co-browsing capabilities</td>
</tr>
<tr>
<td>Help</td>
<td>Access information resources for an in-depth guidance on Virtual Contact Center</td>
</tr>
</tbody>
</table>

Interaction Tabs

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Access all controls required for handling calls</td>
</tr>
<tr>
<td>Chat</td>
<td>Access all controls required for handling chat interactions</td>
</tr>
<tr>
<td>Email</td>
<td>Access all controls required for handling emails</td>
</tr>
<tr>
<td>Status</td>
<td>View the real time status of agents and queues using the directories.</td>
</tr>
<tr>
<td>Notices</td>
<td>Access messages broadcast from your contact center supervisors</td>
</tr>
</tbody>
</table>
QUICK START GUIDE
Virtual Contact Center Agent Console

Using status codes
Status codes are defined by your administrator and describe the reason for your status change.

1. Select a status change button.
2. From the drop down of status codes, select an appropriate code.

Handling calls
- **Outbound:** To dial out, enter a phone number in the phone field and click Dial. Your phone rings first. Answer your phone to initiate the call or click a phone number in the CRM record to automatically dial out.
- **Inbound:** When an inbound call is offered to you, the Phone tab blinks red and your phone rings. Answer the phone to accept the call.

Transferring a call
You can transfer a call to another agent or a queue or an external party. During an active call, announce to the caller about the intended transfer.

To an agent:
- **Blind Transfer:** Click Agents tab to view the status of other agents in the Agent Directory. Select an agent and click Blind Transfer. The call is transferred to the selected agent.
- **Consult Transfer:** Switch to line 2, select an available agent in the Agent tab. Click Make a call from the context menu. Once the call connects, click Transfer Lines for a warm transfer.

To another queue:
1. In the Queue Directory, check the status of a queue to transfer the call to.
2. Select a queue and click Transfer.

To an external party:
1. While on an active call on line 1, switch to line 2.
2. Enter the phone number in the phone field. Click Dial.
3. Wait for the party to answer, then click Transfer Lines.

Setting up a conference
1. During an active call on Phone Line 1, announce to the caller about the intended conference.
2. Switch to Phone Line 2 and call the desired third party.
3. Wait for the party to answer, click Join Lines.

Checking the status of other agents and queues
Status tab provides real time status overview of queues and fellow agents.

- **Queue Status:** Click the tab and then click the Queues tab to view the status of queues you are a member of.
- **Agent Status:** Click the tab and then click the Agents tab to view the status of agents in your agent group.

Favorites: Bookmark frequently-used queues; bookmark agents you interact with most often.

Recents: View the status of queues you have previously transferred calls to; view agents you’ve initiated interactions with.

Using transaction codes
When you end an interaction, you may be prompted to select transaction codes. These codes are configured by your administrator and describe the outcome of an interaction. Select an appropriate code from the list and click save.

Handling a chat
When an inbound chat is offered to you, the Chat tab blinks red. Click Accept button. A chat session is established. After processing the request, click End Chat.

Inserting FAQs in a chat
During an active chat session, you can insert information by browsing through the FAQ knowledge base or by referring to a specific shortcut. In the Insert FAQ entry box, enter the desired shortcut. A link to the FAQ inserts in the chat. Click Send.

Accepting an email
When an inbound email is offered to you, the Email tab blinks red. Click Accept Email. The inbound email creates a case. After processing the request, click End Post Processing.

Agent to agent call or chat
- To call another agent, check the agent’s status in the Agents tab. Select the agent and click Make a call from the context menu.
- To chat with another agent, check the agent’s status in the Agents tab. Select the agent and click Start a chat.

Platform Switch
When you receive platform switch notification, stay logged in until you finish your current phone call. After the final notification, you have ten minutes to log out. Log Out and log back in.

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