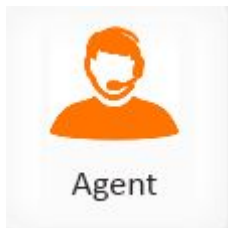


## **Agent Screen**



The agent screen is used by the customer service representative to perform inbound and outbound communication with customers.

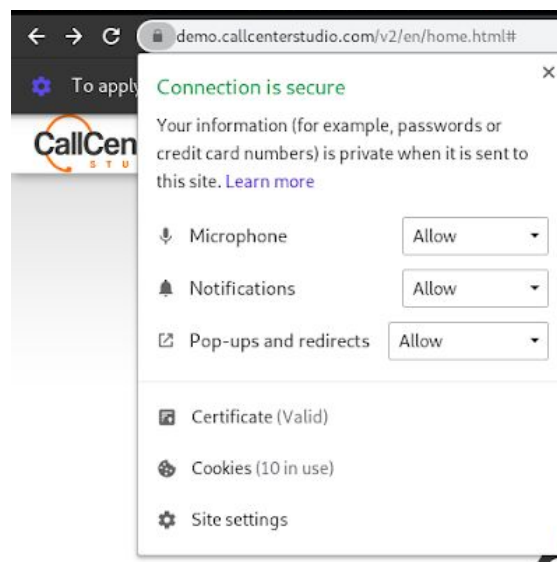
---

## **Audio Settings**


This section contains information to help agents in troubleshooting errors regarding the sound settings in Call Center Studio.

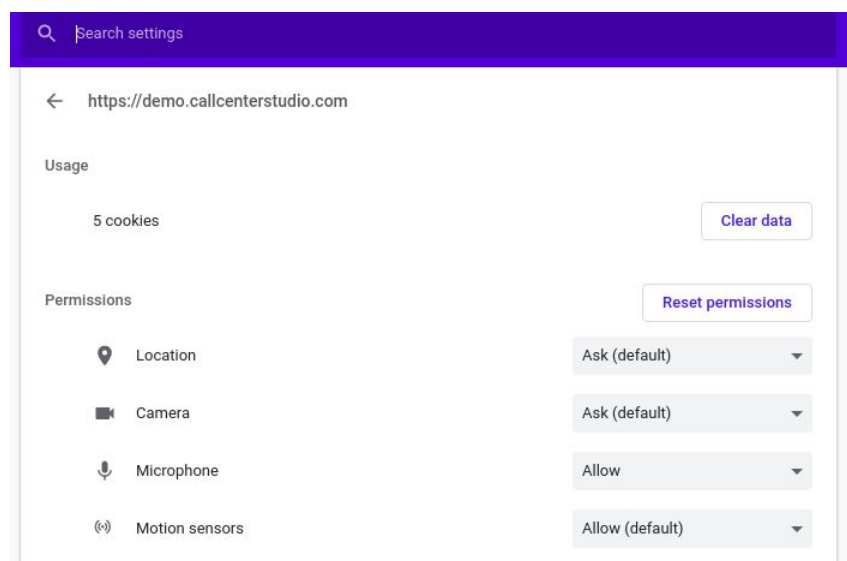
## **URL Settings**


1. Click the security button to the left of the URL when clicked the following settings will be displayed:



*Note: Microphone, Notifications, and Pop-ups and redirects have all been changed to “Allow” for the agent tenant screen.*

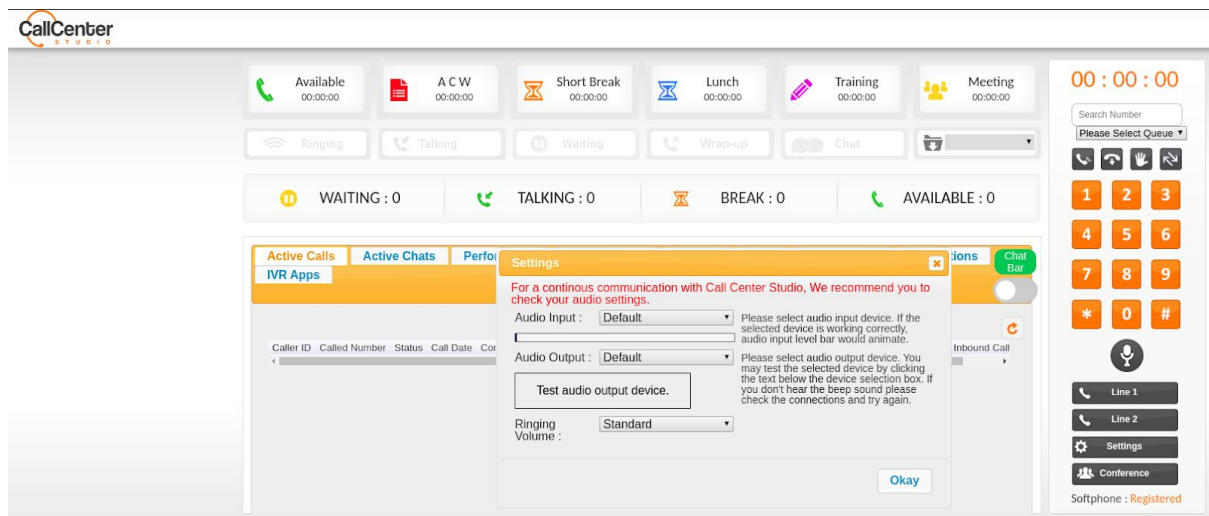
2. If these settings are not initially shown, click site settings,  Site settings, once pressed the page settings screen will appear as shown below:



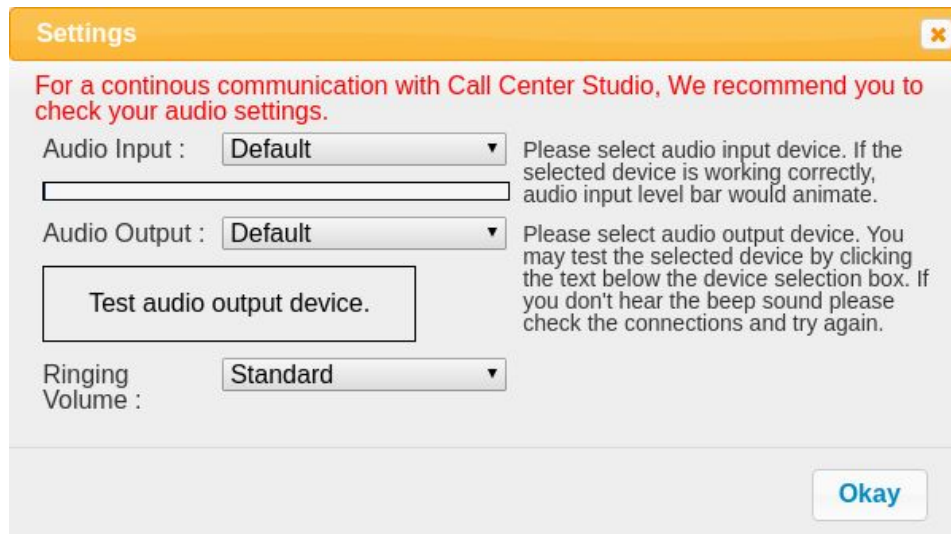
3. Look through the settings list and select "Allow" for the microphone, notification, and Pop-ups and redirects.
4. Click the exit button, , to the right of the settings tab, and return to the Agent Screen.

## Agent Screen Audio Settings

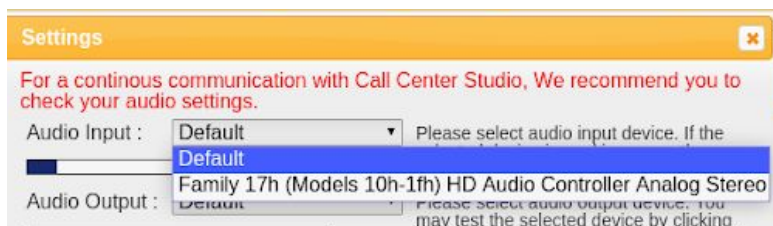
1. Once in the agent module, the following screen will appear:



2. Every time the agent logs into the Agent Screen, the tenant sound setting pop-up window will appear as shown below:

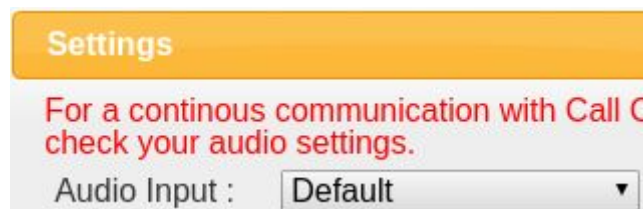


3. Click the “Audio input” dropdown box a dropdown menu will appear:



*Note: In the dropdown menu, the agent should select the desired audio input method.*

5. Select the desired audio input. An example is shown below:

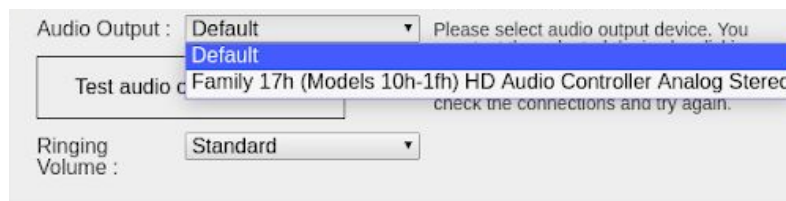


- 
6. After selecting the desired audio input method, use the vertical soundbar shown below to determine if the audio input device is working correctly:



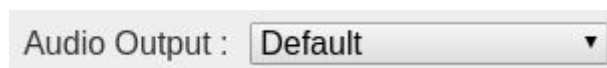
*Note: The audio input level bar will illuminate in dark blue when speaking, to test the proper audio input connection.*

7. Click the “Audio Output” dropdown box a dropdown menu will appear an example is shown below:

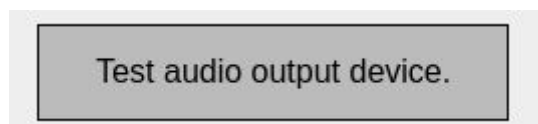


*Note: In the dropdown menu, the agent should select the desired audio output method.*

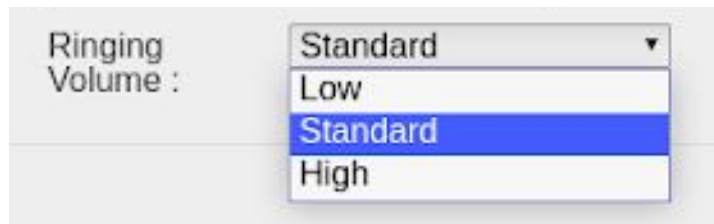
8. Select the desired audio output; an example is shown below:



9. After selecting the desired audio output method, click the "Test audio output device." button if working correctly, a beep will be heard in the agent's selected audio output device, the switch is shown below:

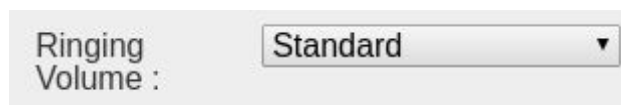


10. Click the Ringing Volume input box a dropdown menu will appear as shown below:



*Note: Ringing volume is based on the agent's preference, three volumes can be selected: Low, Standard, and High.*

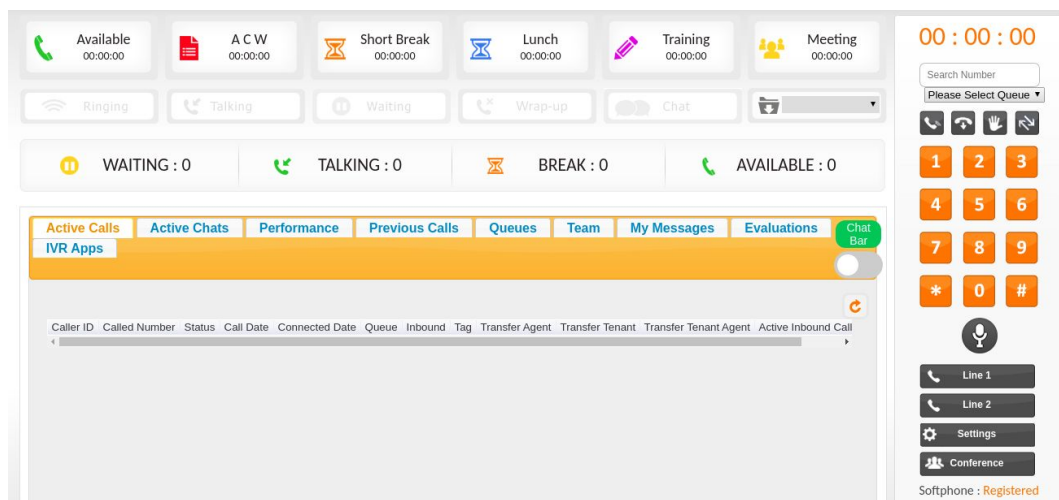
11. Select the desired ringing volume; an example selection is shown below:



12. Once all audio settings have been selected and tested, click the "Okay" button,



. The agent screen will be displayed, as shown below:



## **Agent Statuses**





Agent statuses are used to track agent productivity. Supervisors can view the statuses of agents in real-time. The default and custom statuses are explained in detail below.

### **Default Statuses**

At the top of the agent screen, the six Call Center Studio default agent statuses are listed, an image of these statuses is shown below:





Each status is used differently, as described below:

 <b>Available</b> 00:00:00	Tracks agents' time in available status. For agents to make and receive calls, the available status must be selected.
 <b>A C W</b> 00:00:00	Tracks agents' time in After Call Writeups.
 <b>Short Break</b> 00:00:00	Tracks agents' time on breaks.
 <b>Lunch</b> 00:00:00	Tracks agents' time at lunch.



---

 <p>Training 00:00:00</p>	Tracks agents' time in training.
 <p>Meeting 00:00:00</p>	Tracks agent's time in meetings.

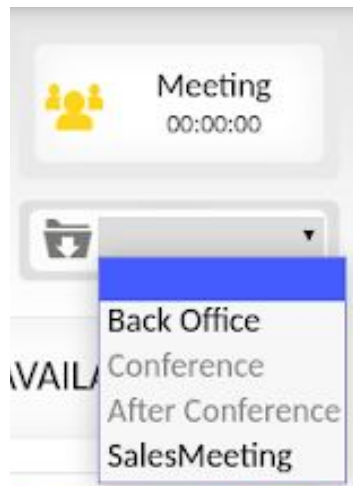
*Note: Agents have to click the status that defines their current situation for proper tracking to occur. Supervisors can change the status of an agent when necessary. (See supervisor section)*

---

## **Custom Statuses**

Custom statuses can be created and defined by the administrator. The following information demonstrates how an agent can select a custom status.

1. Below the meeting tab is a dropdown menu with a folder containing a downward-facing arrow, click this dropdown box below:



*Note: Back office, Conference, and After Conference are built-in statuses and can be made active by administrators (See Statuses Section).*

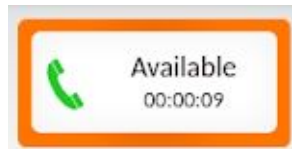
2. SalesMeeting status was created to provide an example of what a custom status looks like; the agent simply needs to click the status (note the agent will not be able to view the time in custom status, but the time can be viewed under the supervisor tab).

---

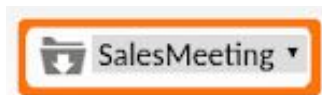
### **Selecting a Status**

To select a Status, click the desired status from the default menu, select a custom status (See Custom Status section for more info). The chosen status will be outlined in orange; examples are shown below:

Active Default Status Example:



Active Custom Status Example:



### **Changing a Status**

To change status, click a different status.





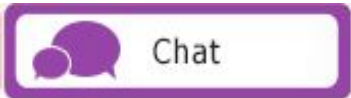
## Call Statuses

Call Statuses are used so that the agent can know the status of the call, such as ringing, talking, waiting, wrap-up, and chat.

The call statuses are not illuminated until a call is made, the unilluminated statuses are shown below:



The five call statuses when illuminated are defined below:





	Will light-up as shown when an incoming call or outgoing call is in progress.
	Will light up as shown when an incoming or outgoing call is answered.
	Will light up when a call has been placed on hold by the agent.
	Pause, used after chatting and calling (through campaigns) for the agent to wrap-up any tasks with the customer. The agent can then reselect "Available" status to continue answering customers. (Wrap-up time can be changed in the Administrator section under Queues).
	Will light up when the agent is chatting with a customer.

## Call Center at a Glance

Metrics regarding the queue and team performance are available to the agent. The “Call Center at a Glance” is a valuable resource for agents to use for time management and decision making. The “Call Center At a Glance” bar is displayed below:



The “Contact Center At a Glance” metrics are defined below:

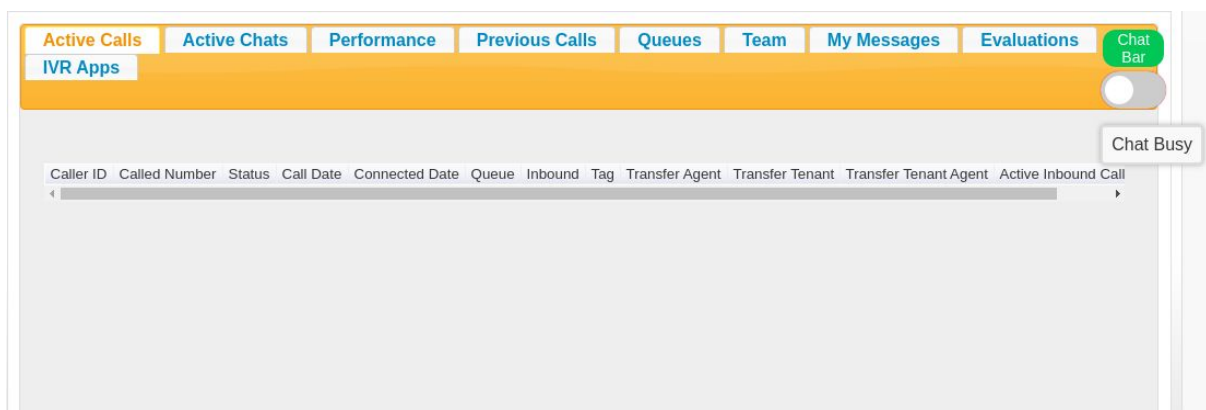
 WAITING : 0	Displays the number of consumers waiting in the queue assigned to the agent
 TALKING : 0	Displays the number of agents talking to consumers in the queue assigned to the agent
 BREAK : 0	Displays the number of agents on break in the queue assigned to the agent
 AVAILABLE : 0	Displays the number of agents available in the queue assigned to the agent

---

## **Agent Panel**

The agent panel allows agents the ability to monitor their active calls, active chats, and performance. Also, the agent can view previous call history from this panel. Also, agents can monitor queue metrics such as total calls, answered calls, short calls, abandon calls, answer speed, and total talking time. Agents can view team status and times in status, and they can send messages to the supervisor, team, or a specific team member. Lastly, agents can see evaluations and use IVR applications all within the control panel.

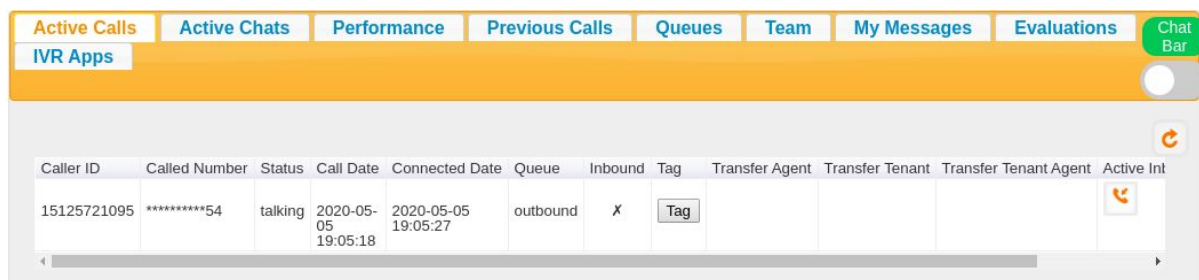
An example of the agent screen is shown below:




## Active Calls

The agent panel's active calls tab provides information about the agent's current call, such as the queue, the consumer name, the status of the call, the duration of the call, and the phone number. Agents can also tag a call if desired when the call is in progress from this screen.

An example of the active calls tab with an active call is shown below:



Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****54	talking	2020-05-05 19:05:18	2020-05-05 19:05:27	outbound	X	<button>Tag</button>				

---

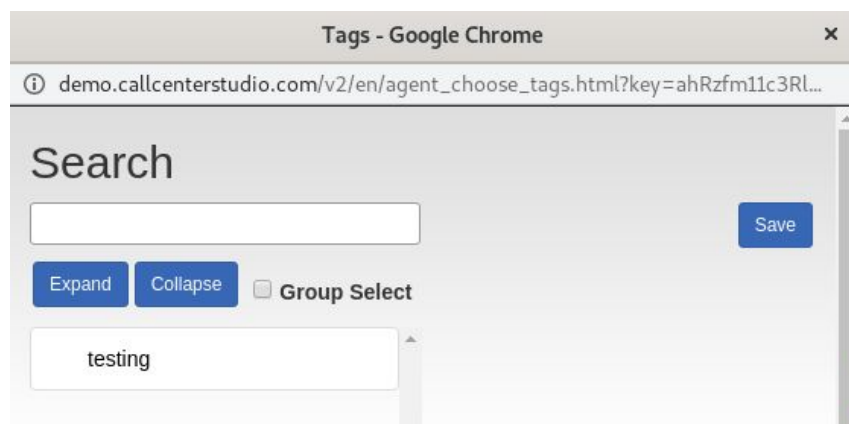
### Tagging an Active Call

Calls can be tagged while the agent is talking to the consumer.

*Note: If a call is tagged while the call is in progress, more tags cannot be added by the agent after the call is finished.*

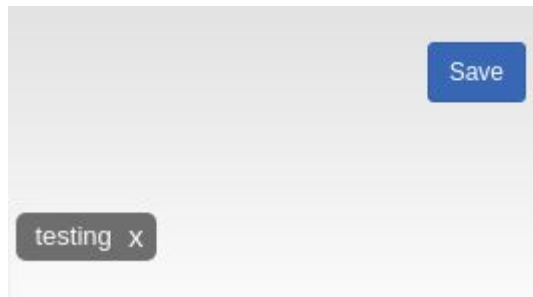
1. While the call is in progress a tag can be assigned to the call by clicking the tag

button, , once click the following pop-up window will be displayed:






- 
2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag(s) from the tag list (Group tag selections can be made by checking the “Group Select” checkbox. Once a tag has been selected, it will be displayed as shown below:



*Note: Tags can be deselected from the call by clicking the X to the right of the tag name.*

3. Once all the desired tag selections have been made, click the save button, .

*Note: More tags can be added while on the call if necessary by repeating steps 1 - 3.*

---

## **Active Chat**

Active Chat shows all of the agent's active chats. Details such as queue, client name, status, duration, tag, and phone number can be viewed in the active chat tab.

The following image is an example of the agent active chat window with a live chat:



---

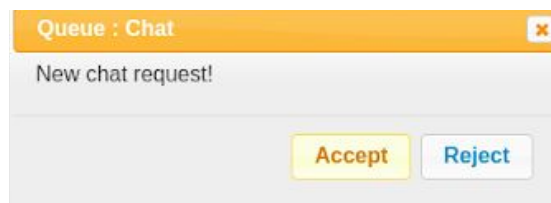
### Answering a Chat

On the agent screen, the following will occur when an incoming chat appears:

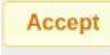
The ringing call status will illuminate:



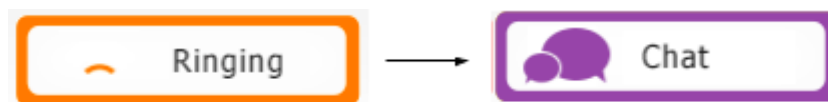
The following pop-up will appear:



- Select the cancel button, , to reject the chat.
- Select the accept button, , to accept the chat

1. Click the accept button, , the following transitions will occur:

The ringing status will change to chat status:



The chat window will appear:

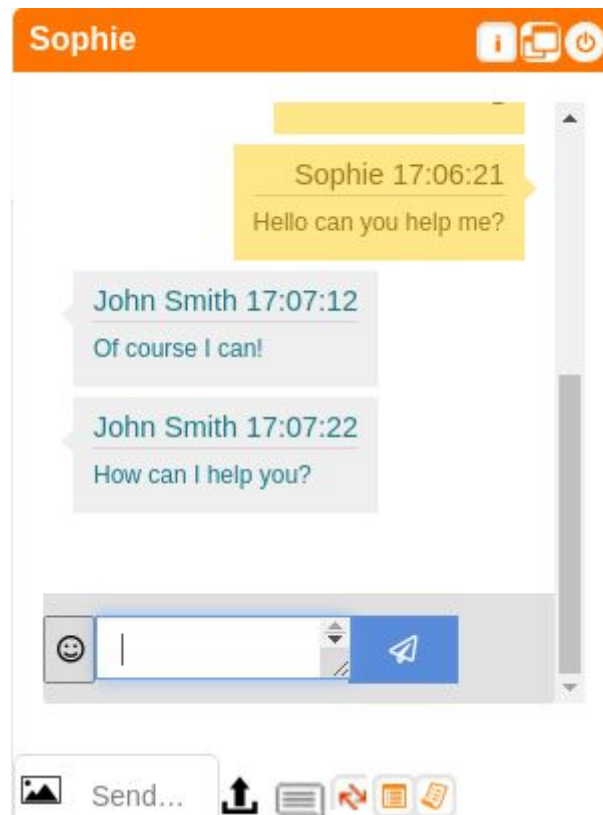


The active chat tab will show the current chat:

Active Calls	Active Chats	Performance	Previous Calls	Queues	Team	My Messages	Evaluations	Chat Bar
IVR Apps								1
Queue ▲	Client Name	Status	Duration	Tag	Phone Number			
Chat	Matt Christina	chatting	00:00:05	Tag				

## Chatting

Using the chat pop-up window shown below:



The following functions can be completed:

---

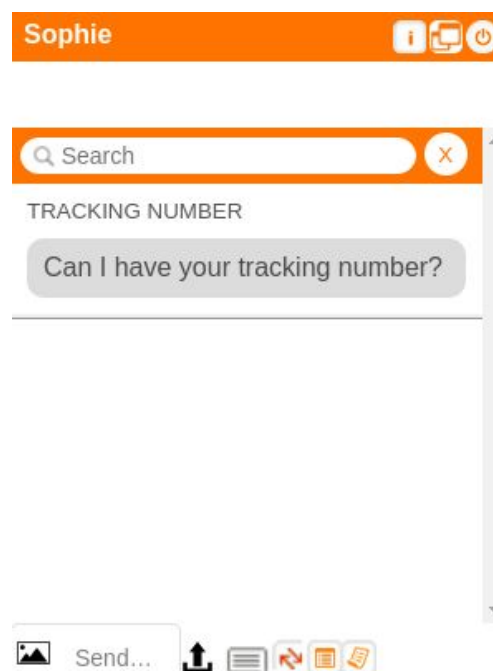
### Sending a Chat Message

1. Click the message input box, , type the desired message.
2. Click the send button, .

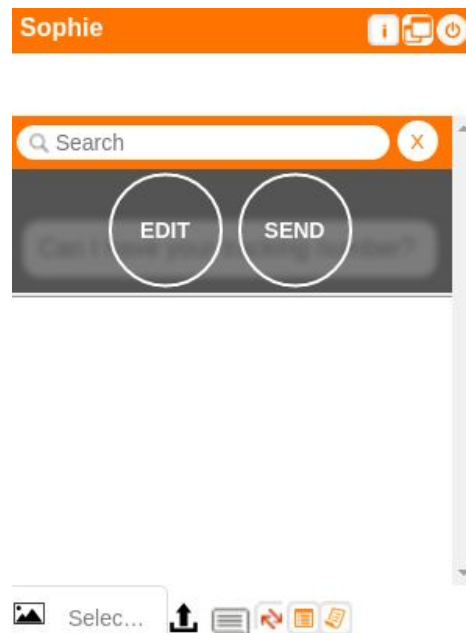
### Sending a Template Message


Template messages are used by agents to increase response time and efficiency. See *Chat Widgets Section, Template messages* for information on creating a template message.



1. Click the open template messages button, , the following screen will appear in the chat window:



- Click the desired template message. The following will appear:




*Note: If multiple template messages are present, the search input box, , can be clicked, type the desired subject of the template message to filter the results.*

- The Template message can be sent directly by clicking the send button, , or the message can be edited by clicking the edit button, . Once the edit button is clicked the template message will appear in the message input box as shown below:




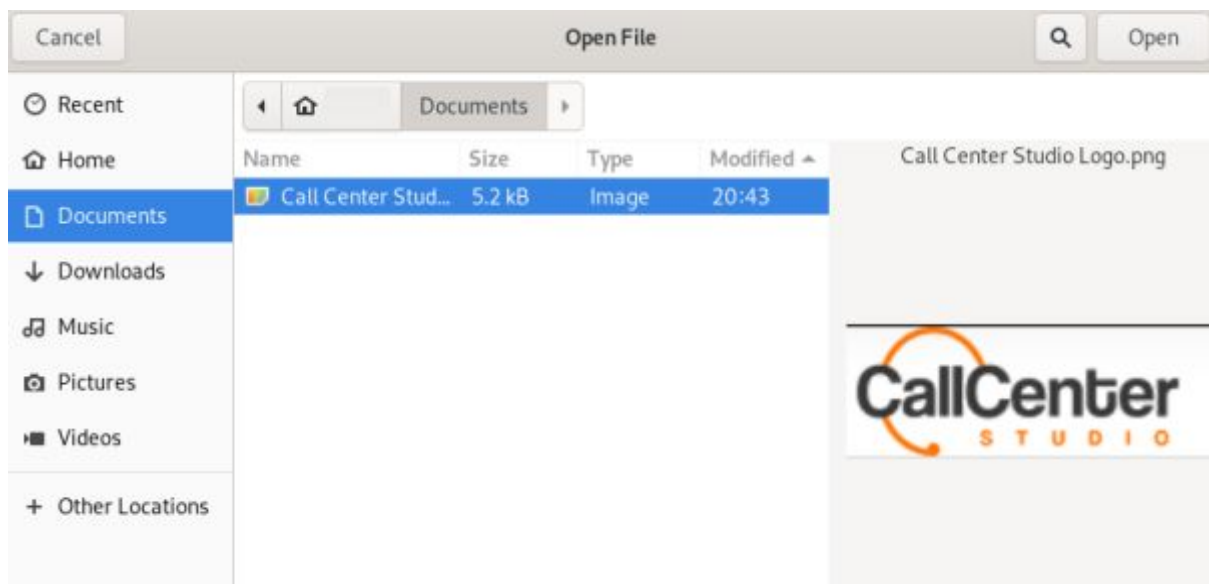
4. Edit the Template message as desired.

5. Click the send button, .

### Sending a File

*Note: Sending a file feature can not be used when “Restricted File Sharing” is checked for the chat widget. The following image shows how the agent chat screen changes when this checkbox is selected:*


1. Click the send file window,  Send..., the following popup will appear:





2. Click the desired file. The file will appear in the send file window, as shown below:



3. Click the send file button, , the file will appear in the chat window, as shown below:




---

### Parking a Chat


Parking allows the customer to be placed on hold. Agents can answer other chats when the customer responds the same agent will receive the chat.

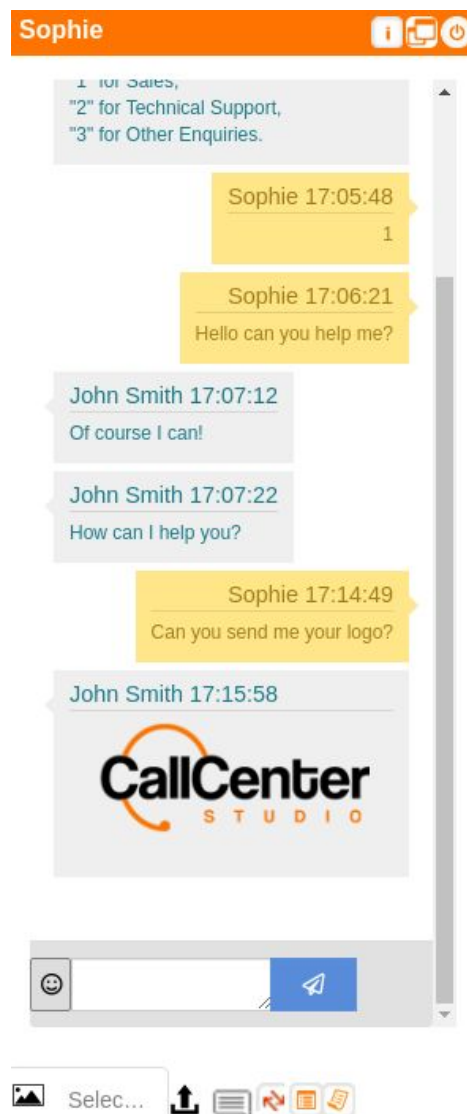
1. Click the park button, , the following pop-up window will appear:



2. Click the yes button, .


### Expanding the Chat Window

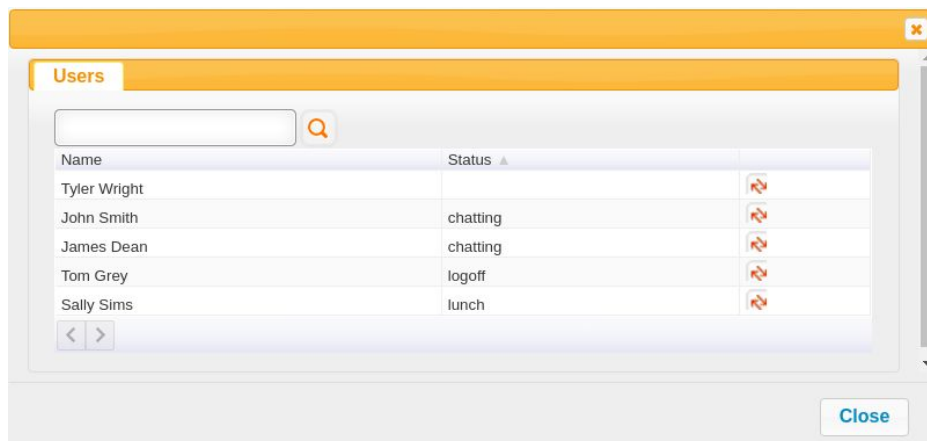
1. Click the change size button, , the chat window will enlarge an example is shown below:




---

### Transferring a Chat

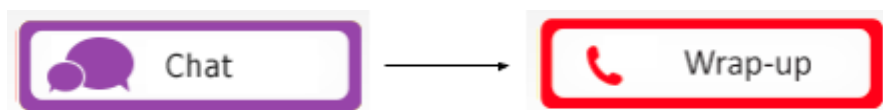
1. Click the transfer button, , the following pop-up will be displayed:



2. In the search input box, type the user's name if the agent is available, select the transfer button, , to the right of the status column. The following transition will take place:

The chat window will disappear.


The chat status will change to wrap-up status:



The available button will illuminate:



### *Pulling Data from a CRM Using a Web Service for a Chat*

1. Click the custom field button, , the following pop-up screen will appear:




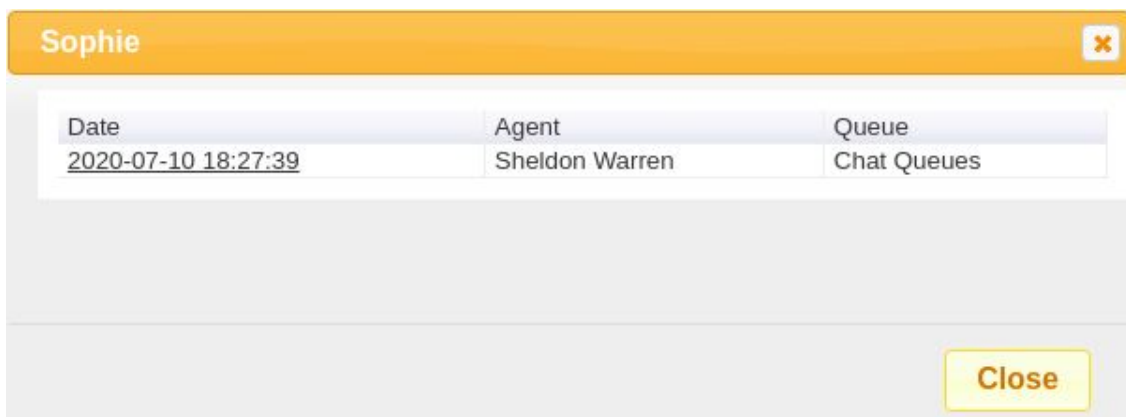
Note: Currently, the custom field example is not pulling information from the web service because the screen is blank. When using a web service, data about the customer from the

---

CRM can be viewed here. (If desired, this feature can be completed, talk to the assigned Call Center Studio Project manager.)

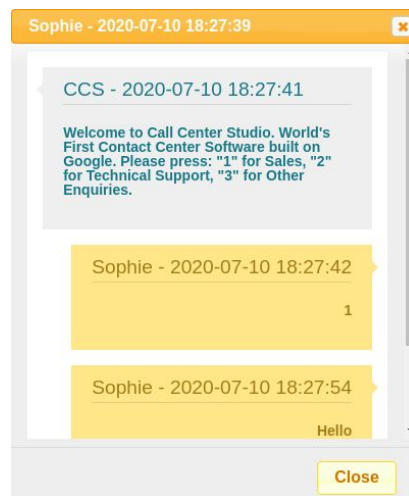
Viewing Customer Previous Chat History on a Chat

1. Click the view history button, , the following pop-up screen will appear:




*Note: Previous customer chat history can be viewed if the customer inputs the same email address. The tenant uses the email to keep track of the chat records.*

- 
- Click the desired underlined date located in the date column. The following pop-up screen will be displayed:




- After viewing, click the “Close” button,



- Then click the other “Close” button, , to exit the previous chat history window.

---

### Finishing a Chat

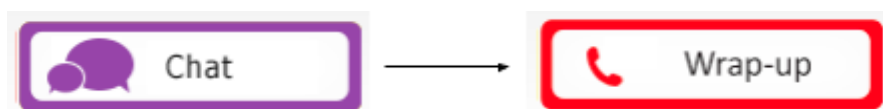
1. Click the finish chat button, , the following pop-up screen will appear:



2. Click the yes button, . The following transitions will occur:

The chat window will disappear.

The chat status will change to wrap-up status:



The available button will illuminate:





The performance tab monitors an agent’s daily self-performance.

Active Calls

Active Chats

Performance

Previous Calls

Queues

Team

My Messages

Evaluations

Chat Bar

IVR Apps

Total Calls	Total Talk Time	Total Avg Talk Time	Total Local Release	Inbound Calls	Inbound Talk Time	Inbound Avg Talk Time	Inbound Local Release	Answer Sp
8	00:06:34	00:01:18	6	0	00:00:00	00:00:00	0	0

Total Holds	Total Duration	Available	Break	Lunch	Break + Lunch	Meeting	Training	ACW	Back Office	Talking	Ringing	Wrap-up	Dialing	Cl
2	01:28:22	00:53:54	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:01:11	00:05:17	00:00:00	00:00:00	00:03:21	00


The previous call tab lists the last 19 calls that the agent has made or received. Quick metrics on these calls can also be viewed under the performance tab and the ability to tag previous calls. An image of a “Previous Call” tab is displayed below:

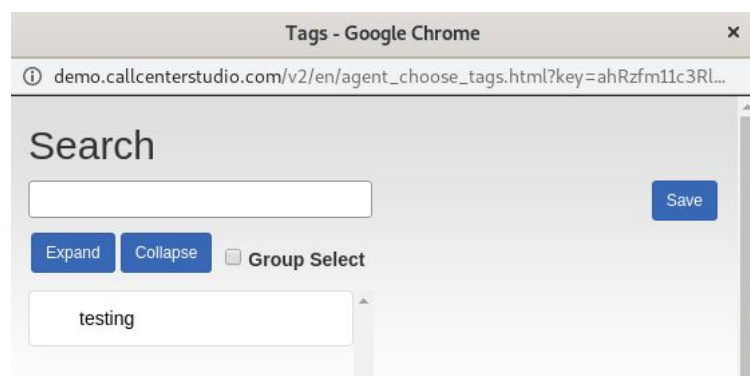
Active Calls	Active Chats	Performance	Previous Calls	Queues	Team	My Messages	Evaluations	Chat Bar
IVR Apps								
Caller	Called	Queue	Call Date ▾	Start Date	Finish Date	Duration	Tag	
 <a href="#">15125721095</a>	 <a href="#">*****54</a>	outbound	2020-05-05 19:05:18	2020-05-05 19:05:27	2020-05-05 19:09:24	00:03:57		
 <a href="#">15125721095</a>	 <a href="#">*****54</a>	outbound	2020-05-05 18:49:19	2020-05-05 18:49:26	2020-05-05 18:49:58	00:00:32	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****54</a>	outbound	2020-05-05 18:33:04	2020-05-05 18:33:12	2020-05-05 18:33:18	00:00:06	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****54</a>	outbound	2020-05-05 18:32:22		2020-05-05 18:32:57	00:00:00	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****54</a>	outbound	2020-05-05 18:30:27	2020-05-05 18:30:52	2020-05-05 18:32:11	00:01:19	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****20</a>	outbound	2020-05-05 16:34:47		2020-05-05 16:35:44	00:00:00	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****77</a>	outbound	2020-05-05 16:32:39	2020-05-05 16:33:08	2020-05-05 16:33:48	00:00:40	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****20</a>	outbound	2020-05-05 16:17:56		2020-05-05 16:18:17	00:00:00	<button>Tag</button>	
 <a href="#">15125721095</a>	 <a href="#">*****63</a>	outbound	2020-05-04 17:10:38	2020-05-04 17:10:49	2020-05-04 17:15:08	00:04:19	<button>Tag</button>	

---

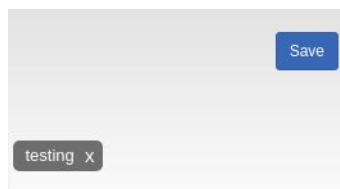
### Tagging a Previous Call

*Note: If a call is tagged in the previous call screen,, more tags cannot be added after the save button is clicked.*


1. Click the tag button, , located on the far right of the call metrics, once clicked, the following pop-up window will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by checking the “Group Select” checkbox. Once a tag has been selected, it will be displayed as shown below:



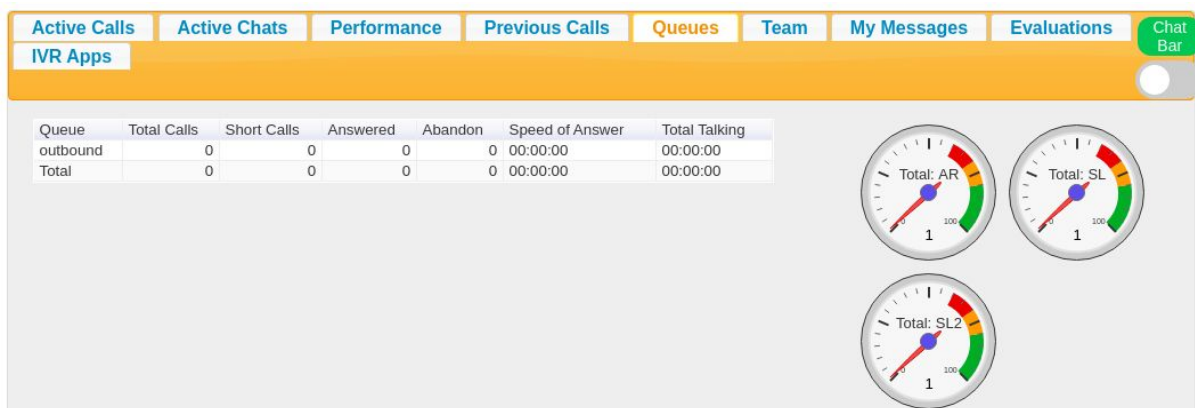
*Note: Tags can be deselected from the call by clicking the X to the right of the tag name.*

- Once all the desired tag selections have been made, click the save button, .

## Queue

The Queue tab gives the agent brief performance metrics on how the assigned queue is performing. Metrics such as total calls, short calls, answered calls, abandoned calls, answering speed, and total talking time can be found under the Queue tab.

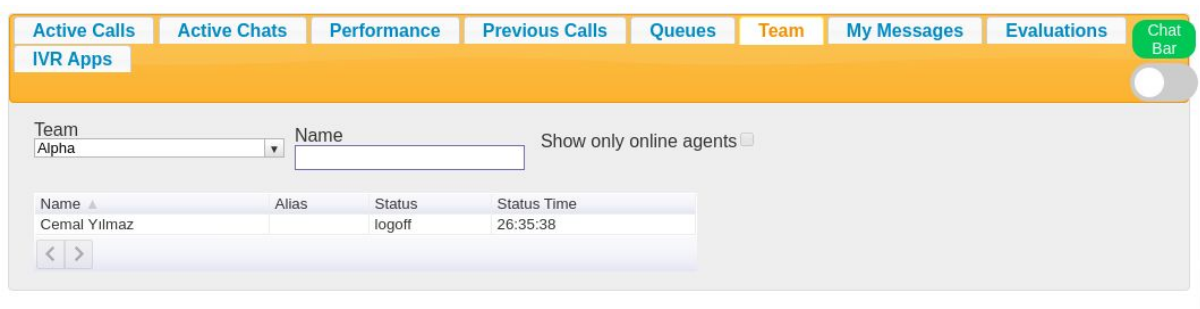
An example “Queue” tab is shown below:



## **Team**

The administrator or supervisor can make and assign agents to teams. If the agent has been assigned a team, quick metrics on team members such as name, status, and status time can be viewed here.

An example of the team tab is shown below:



The screenshot shows the 'Team' tab selected in the top navigation bar. Below the navigation bar, there is a dropdown menu for 'Team' set to 'Alpha', a text input field for 'Name', and a checkbox for 'Show only online agents'. Below these fields is a table with the following data:

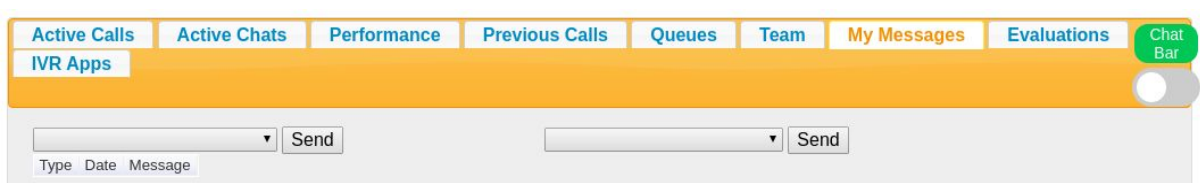
Name	Alias	Status	Status Time
Cemal Yilmaz		logoff	26:35:38

Navigation arrows are visible at the bottom left of the table.

## **My Messages**

The My Messages tab is used by the agent to send messages to a supervisor and team members.

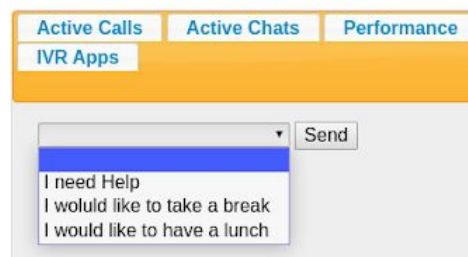
An example of the My Messages tab is shown below:



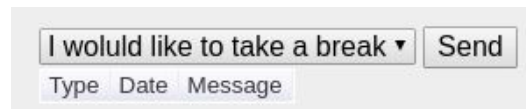
The screenshot shows the 'My Messages' tab selected in the top navigation bar. Below the navigation bar, there are two identical message input fields. Each field consists of a dropdown menu for 'Type', a text input for 'Date', a text input for 'Message', and a 'Send' button.


### Sending a Default Message to a Supervisor

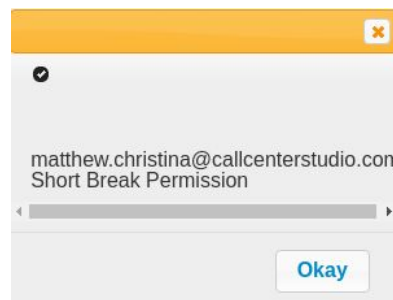
1. Click the first dropdown box (on the left) an example dropdown listing of default messages is shown below:



2. Click the desired message an example selection is shown below:



3. Click the send button, . The following notification pop-up window will be displayed on the supervisor screen:



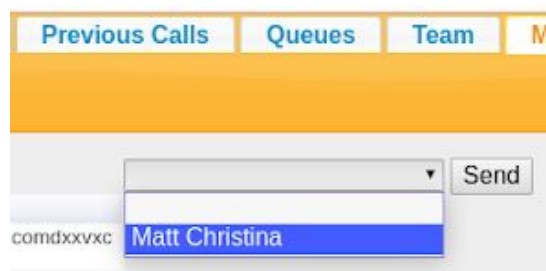
*Note: Previously sent messages can be viewed by the agent, as shown below:*

Type	Date	Message
Customer Representative	28/5/2020 17:23:41	sheldon.warren@callcenterstudio.comhello
	28/5/2020 17:23:41	hello

---

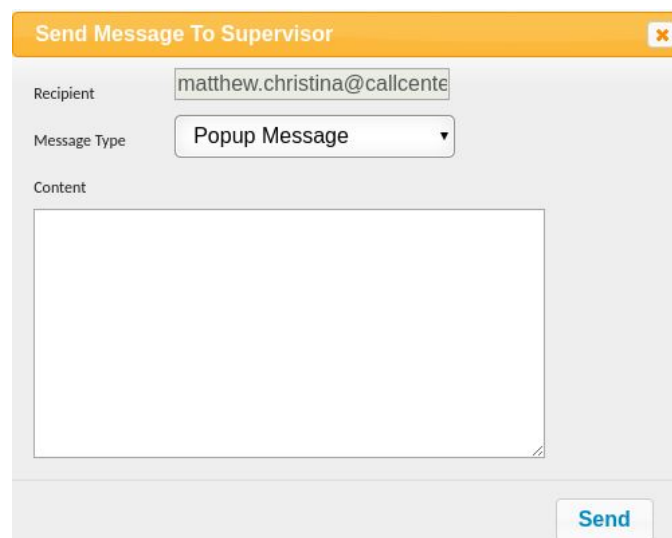
*Sending a Custom Message to a Supervisor*

1. Click the second dropdown box (on the right) the following dropdown menu will appear:



*Note: If the agent is assigned a team, and there are multiple supervisors, all the supervisors' names will be listed in the dropdown menu.*

2. Click the desired supervisor (if multiple) the following pop-up window will appear:

A screenshot of a pop-up window titled 'Send Message To Supervisor'. The window has a yellow header bar with a close button (X) in the top right corner. Below the header bar, there are three fields: 'Recipient' with the value 'matthew.christina@callcente', 'Message Type' with a dropdown menu showing 'Popup Message', and 'Content' with a large text area. At the bottom right of the window, there is a 'Send' button.

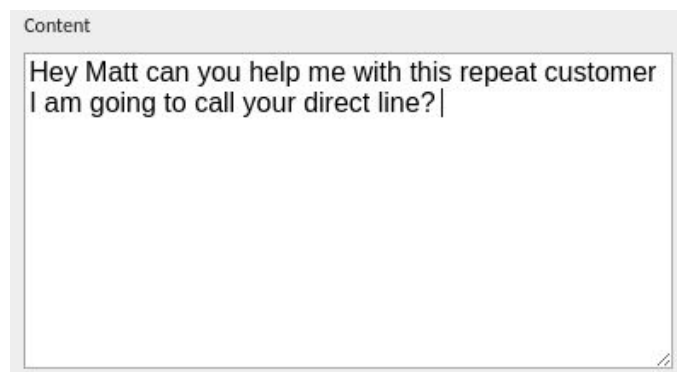
3. Click the message type input box the following dropdown menu will be shown:


A screenshot of a web form titled "Send Message To Supervisor" in an orange header. The form has three fields: "Recipient" with the value "matthew.christina@callcente", "Message Type" with a dropdown menu showing "Popup Message", and "Content" with a text input box. The dropdown menu is open, showing "Message" and "Popup Message" as options, with "Popup Message" highlighted in blue.

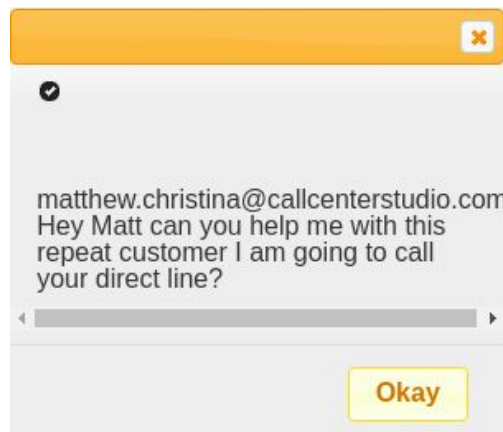
4. Select the desired message type. Note the default message type is Popup Message. An example selection is shown below:

A close-up of the "Message Type" dropdown menu. The label "Message Type" is on the left, and the dropdown box shows "Popup Message" with a downward arrow.

5. Click the content input box, and compose the message. An example message is displayed below:

A screenshot of the "Content" input box. The label "Content" is at the top left. The text area contains the message: "Hey Matt can you help me with this repeat customer I am going to call your direct line?".

6. Click the send button, . The following notification pop-up window will be displayed on the supervisor screen:



*Note: Previously sent messages can be viewed by the agent as shown below:*

Type	Date	Message
	5/5/2020 20:41:48	Hey Matt can you help me with this repeat customer I am going to call your direct line?



## **Evaluations**

Supervisors can evaluate agent performance based on calls and chats. Agents can view evaluations under the evaluations tab. Details can be seen under this tab, such as Caller, date, duration of the call, evaluation score, and call recording. Agents can also view supervisor comments, messages, or make objections on the evaluated score.

An example of the evaluation tab with an agent evaluation is shown below:

Active Calls

Active Chats

Performance

Previous Calls

Queues


Team

My Messages

Evaluations


Chat Bar

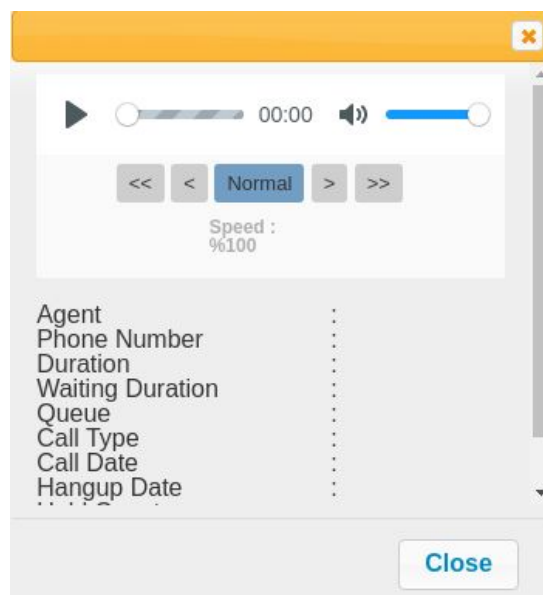
IVR Apps

Caller	Called	Call Date	Hangup Date	Queue	Duration	Score	Evaluation Date	Evaluating User	Recording	Objectior
15125721095	*****43	2020-05-05 20:23:50	2020-05-05 20:25:14	outbound	49	10	2020-05-06 16:32:51	matthew.christina@callcenterstudio.com		<a href="#">Object To</a>

---

Listening to Call Recording from an Evaluation

1. Click the “Recording” button, , under the recording column on the evaluation. The following pop-up will be displayed:




2. Click the play button, , to listen to the recording.

*Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:*




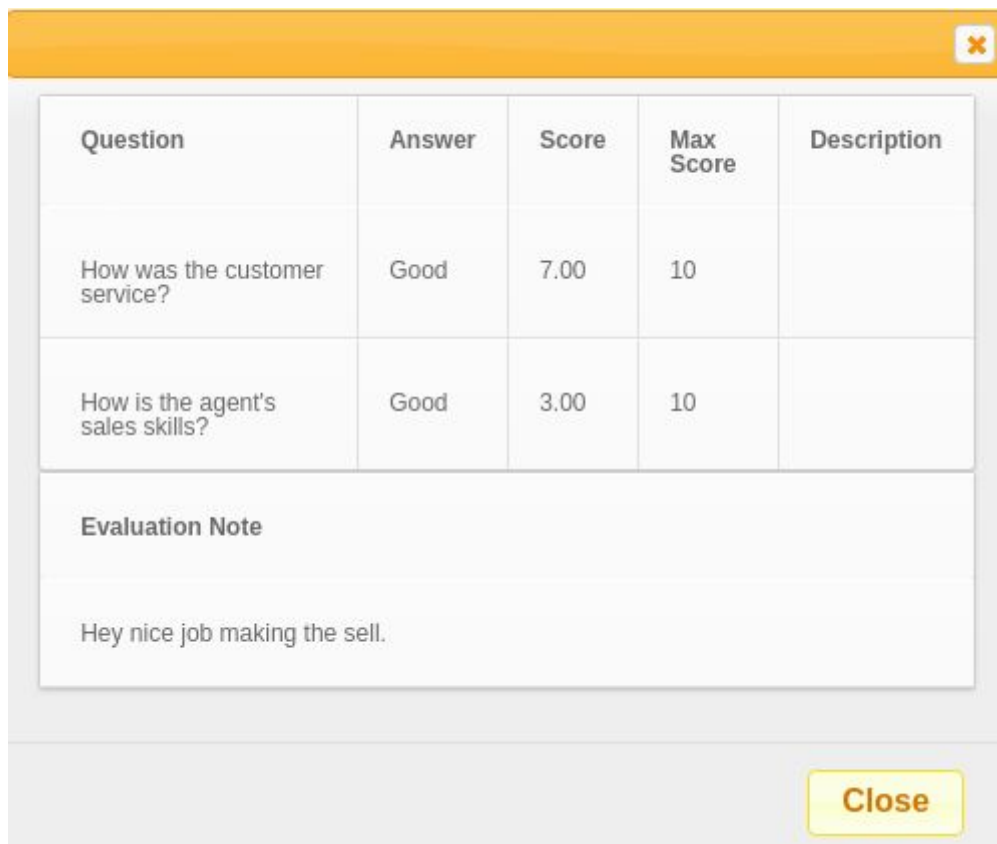
*Note: volume can be adjusted using the bar shown below:*



3. Click the close button,  .

### Viewing Supervisor Comments from an Evaluation

1. Click the “Detail” button,  , under the evaluation detail column on the evaluation. The following pop-up will appear:



The pop-up window displays evaluation data in a table format. It includes a close button in the top right corner. The table has five columns: Question, Answer, Score, Max Score, and Description. Below the table is a section for the Evaluation Note.

Question	Answer	Score	Max Score	Description
How was the customer service?	Good	7.00	10	
How is the agent's sales skills?	Good	3.00	10	

**Evaluation Note**

Hey nice job making the sell.

**Close**

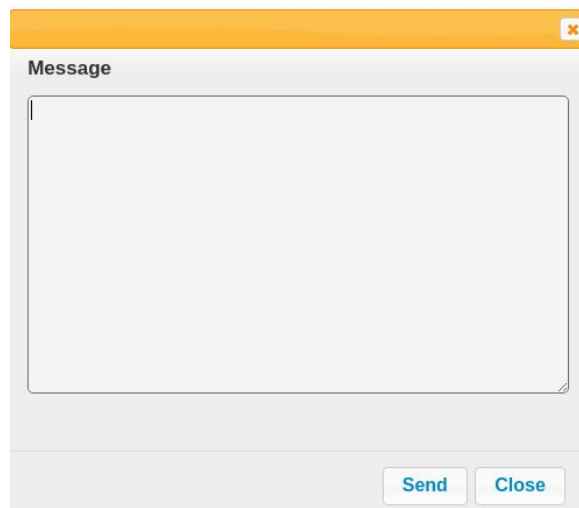
*Note: Evaluations questions, answers, agent scores, max scores, and evaluation notes can all be viewed from the evaluation detail pop-up window.*

- 
3. To exit the evaluation window, click the close button,


A yellow rectangular button with the word "Close" in orange text.

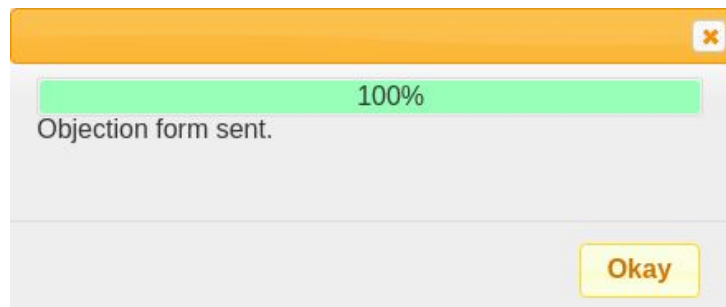
*Commenting on an Evaluation*


1. Click the “Object To” button, Object To, under the objection column on the evaluation. The following pop-up will appear:



2. Click the message input box, type a message to be sent to the supervisor.

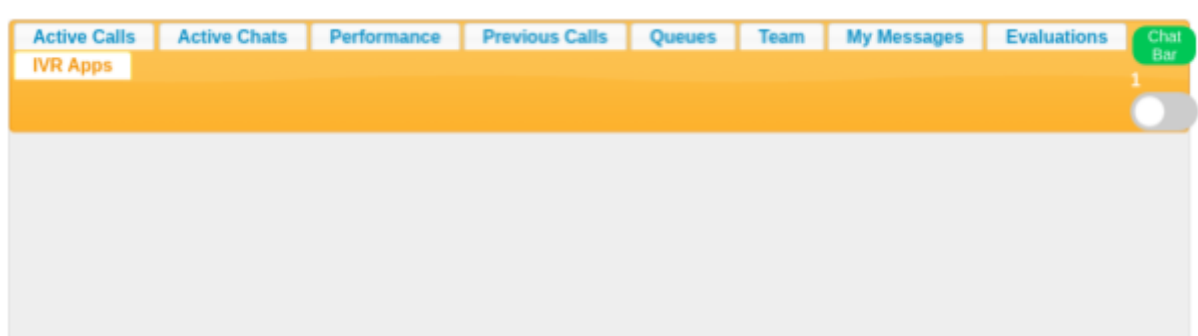
3. Click the send button, , the following confirmation window will be displayed:



4. Click the okay button, , to return to the agent screen.

### **IVR Apps**

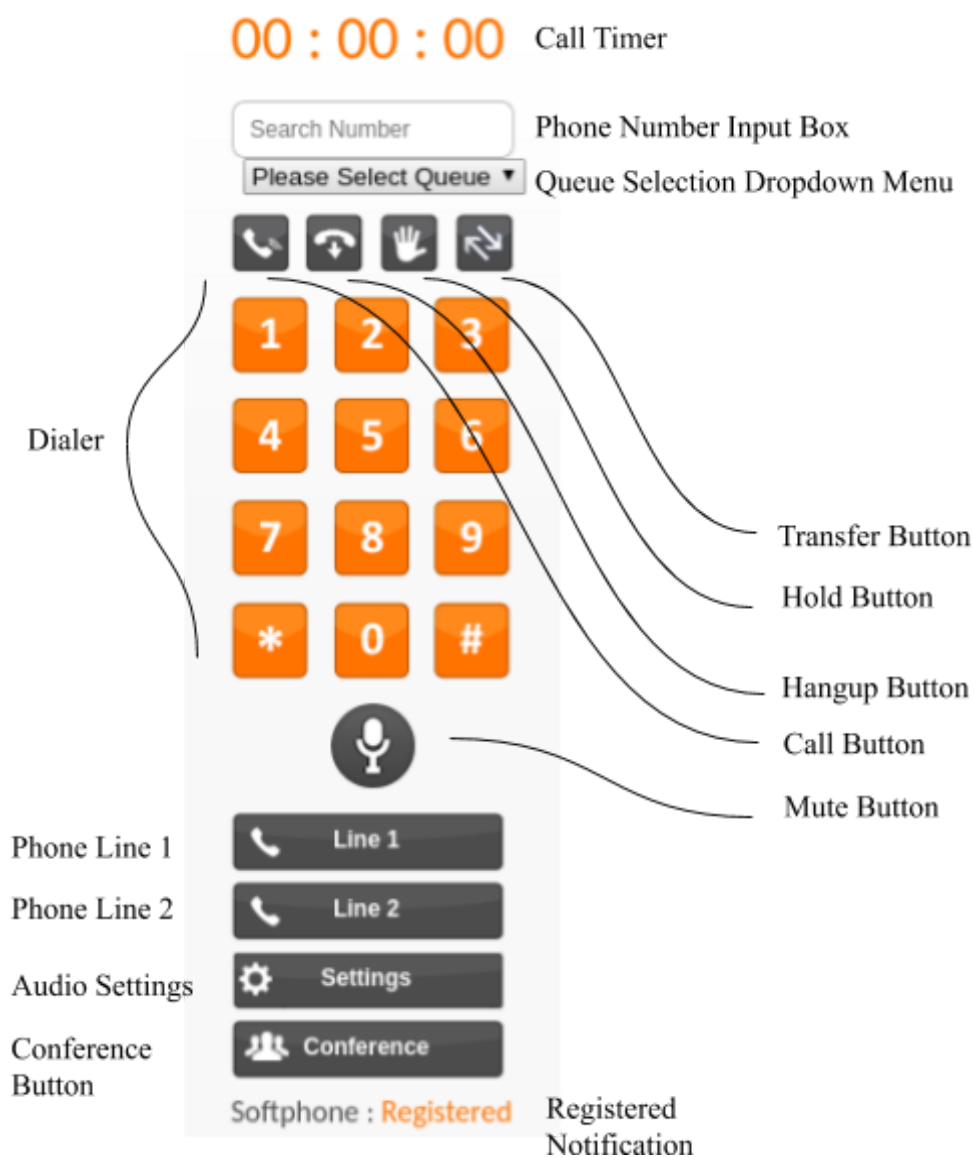
The IVR apps section is displayed here. It is blank because there are numerous IVR apps that the Call Center Studio development team can add according to your operation. (For more information on IVR apps or to have one added, contact the assigned Call Center Studio Program Manager).



## Softphone

The softphone is used by the agent for manual dialing, transferring, talking to multiple customers, conference calls, settings adjustments, holds, and hangups.

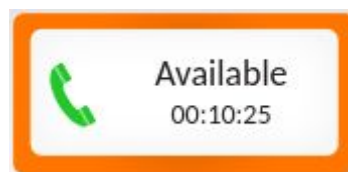
An example of the softphone with descriptions is shown below:



---

## **Receiving a Call**

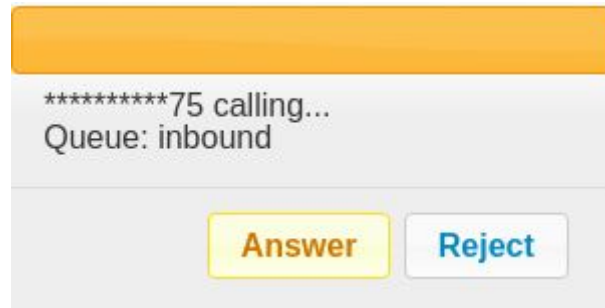
1. Check registered notification, **Softphone : Registered**, located at the bottom of the softphone (see softphone image). If “Registered” is not visible, check the network connection.
2. Click Available Status, once clicked, the status will be highlighted in orange, as shown below:



3. Click the queue selection dropdown menu, **Please Select Queue ▼**, select the desired queue, an example queue selection is shown below:



4. When an inbound call comes in the following pop-up window will be displayed:



The following transitions also occur:

*Line 1 shown in gray will change to green, as shown below:*



*Ringing will illuminate in orange, as shown below:*



*The “Available” button will transition, as shown below:*

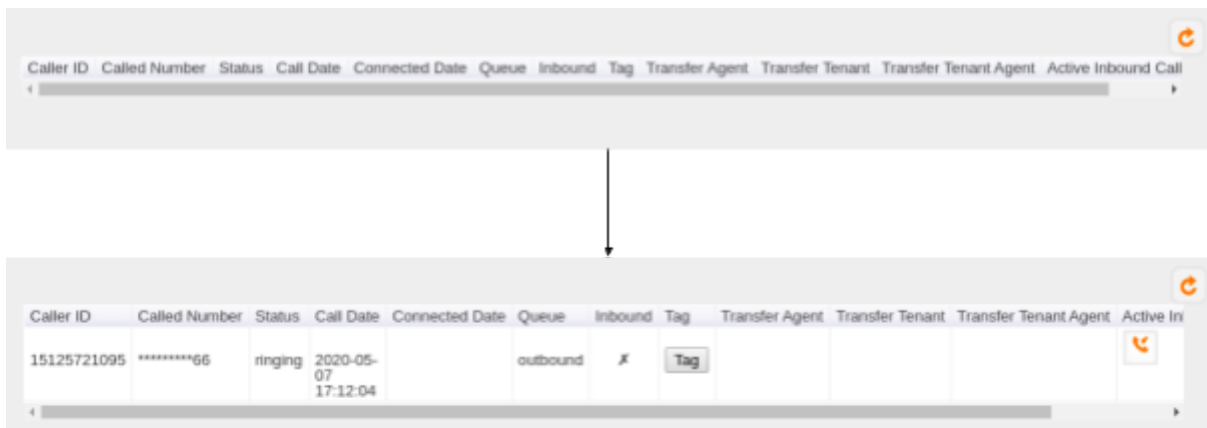





The Call Timer will start timing the ringing time, as shown below:

00 : 00 : 00 → 00:00:10

The Agent panel will display the call, as shown below:



Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Inbound Call
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

- Click the Answer button, **Answer**. The following transitions will occur:

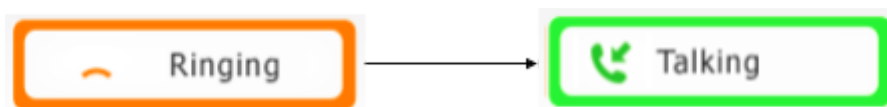
The available button will transition, as shown below:




The Call Timer will start timing the call as shown below:

00 : 00 : 00 → 00:00:10


The illuminated ringing status will transition to illuminated calling status, as shown below:



The displayed call status in the Agent panel will change from ringing to talking, as shown below:

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

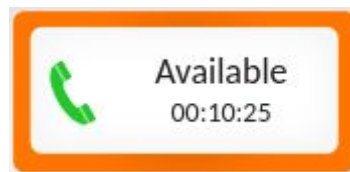
↓

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				

---


## **Making a Call**

1. Check registered notification, **Softphone : Registered**, located at the bottom of the softphone (see softphone image). If “Registered” is not visible, check the network connection.
2. Click Available Status, once click it will be highlighted in orange, as shown below:




3. Click the queue selection dropdown menu, **Please Select Queue ▼**, select the desired queue, an example queue selection is shown below:



4. Click the phone number input box, , type the desired phone number using the Dialer (as displayed in the softphone image) or use the computer's keyboard, an example is shown below:

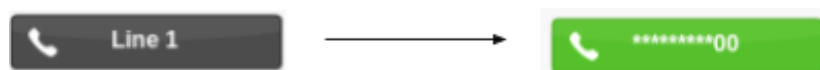


5. Click the Call Button, , or the Enter key (found on keyboard), once the call is dialed the following will take place as shown below:

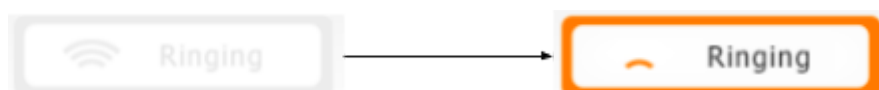
*The available button will transition, as shown below:*



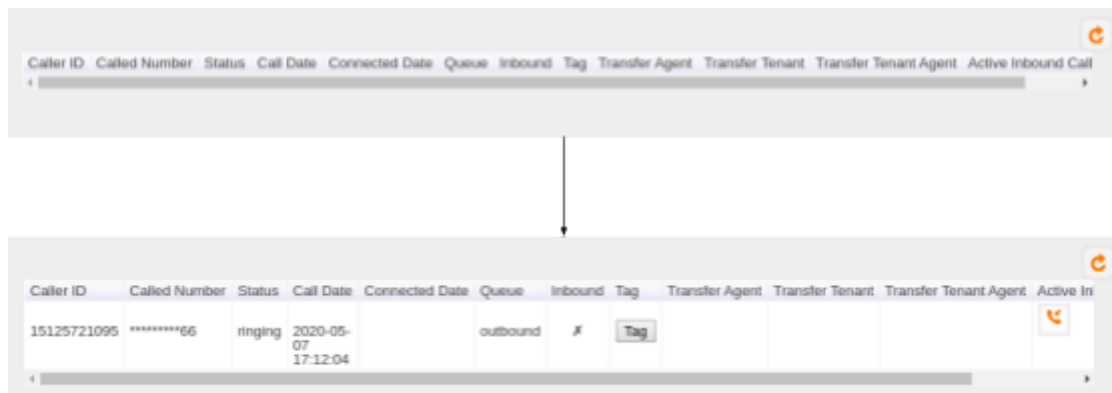
*Line 1 shown in gray will change to green, as shown below:*




*Ringing will illuminate in orange, as shown below:*



The Agent panel will display the call, as shown below:



The diagram shows a call being selected from a list and then opening in a detailed agent panel. The agent panel displays the following information:

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Inbound Call
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

6. Once the call is answered, the following will take place, as shown below:


The Call Timer will start timing the call as shown below:

00 : 00 : 00 → 00:00:10


The illuminated ringing status will transition to illuminated calling status, as shown below:




The displayed call status in the Agent panel will change from ringing to talking, as shown below:

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

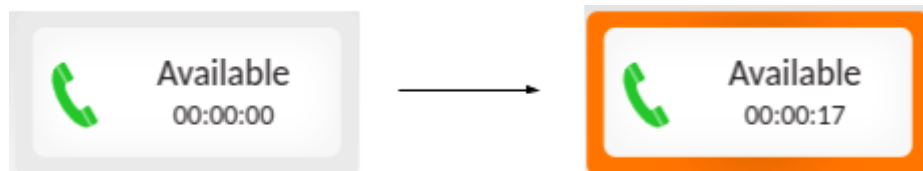
↓

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				

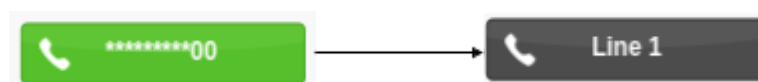
## Ending a Call

- Click the Hangup Button, , the following transitions will take place as explained below:

*The available button will illuminate again in orange (timer will begin again for available status):*



*The illuminated in green line 1 will transition to gray:*




---

*The Call Timer will stop the call, as shown below:*

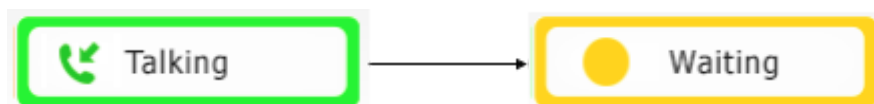
00:00:10

*Note: The call timer will display the most recent call time.*

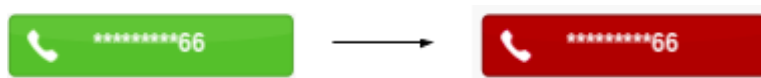
### **Putting a Call on Hold**

1. While a call is in progress, click the Hold Button, , the following transitions will take place as explained below:

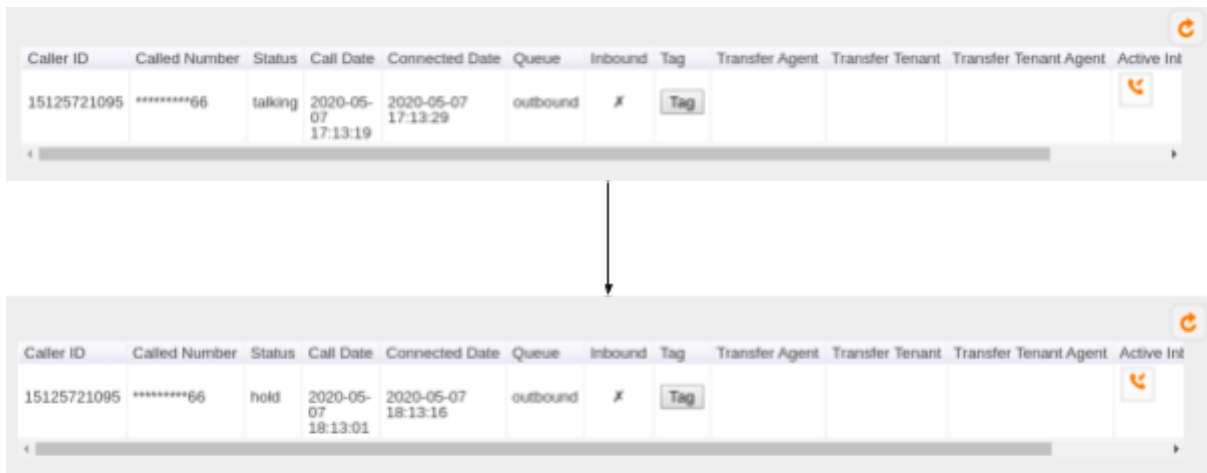
*The talking status will transition to the waiting status, as shown below:*




*Line 1 will change from green to red, as shown below:*




*The displayed call status in the Agent panel will change from talking to holding, as shown below:*



Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				

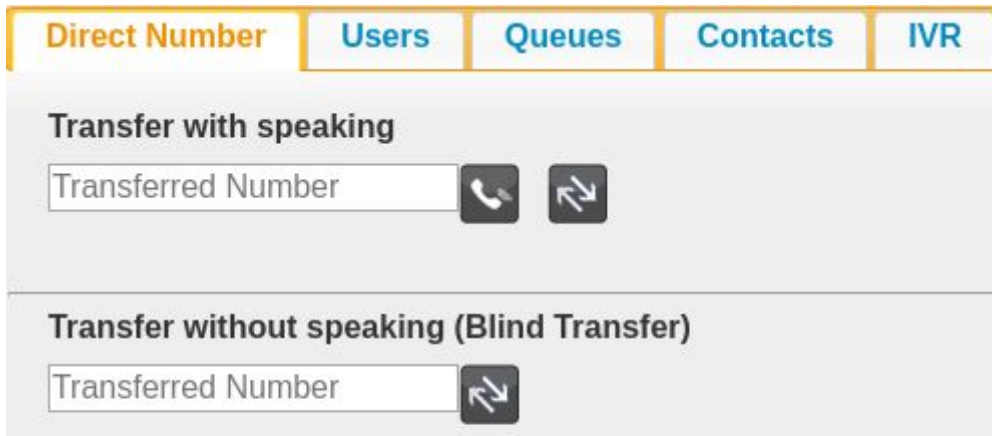
Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****66	hold	2020-05-07 18:13:01	2020-05-07 18:13:16	outbound	X	Tag				



---

### **Performing a Call Transfer**

1. While on a call click the transfer button, , the following input box will appear:



The screenshot shows a software interface for performing a call transfer. At the top, there is a horizontal menu with five tabs: "Direct Number", "Users", "Queues", "Contacts", and "IVR". The "Direct Number" tab is currently selected and highlighted in orange. Below the tabs, the interface is divided into two main sections. The first section is titled "Transfer with speaking" and contains a text input field labeled "Transferred Number". To the right of this input field are two icons: a telephone handset and a transfer button (two arrows forming a square). The second section is titled "Transfer without speaking (Blind Transfer)" and also contains a text input field labeled "Transferred Number". To the right of this input field is a single transfer button icon.

*There are four ways to transfer:*

#### **Direct Number**

To transfer via direct number:

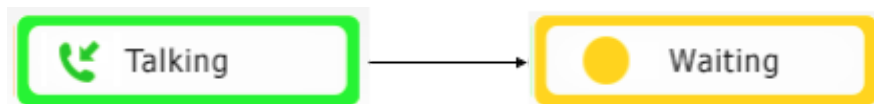
### Transfer with speaking

1. Click the Transfer with speaking input button,  
type the desired number for the transfer.

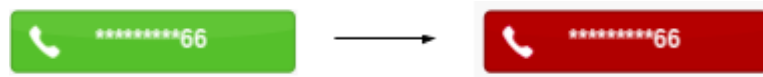


2. Click the call button, , the following will take place,

*The talking status will transition to the waiting status, as shown below:*




*Line 1 will be placed on hold:*



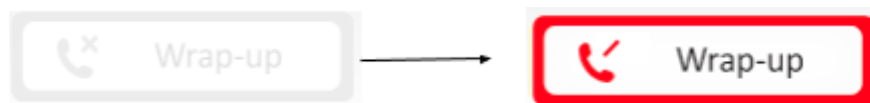
*Line 2 will illuminate in green:*



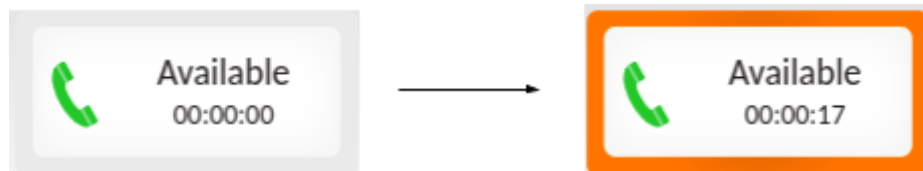
3. Once Line 2 answers the phone, the agent can explain the situation to the caller on line 2.

4. After explaining the situation, click the transfer button, , the transition will take place:

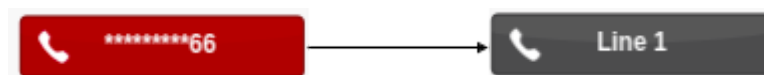
*Wrap-up call status will illuminate:*



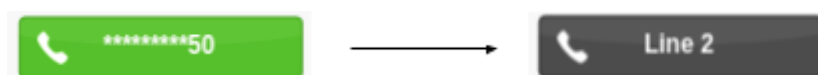
*The available button will illuminate again in orange (timer will begin again for available status):*



*The illuminated in red, line 1 will transition to gray:*

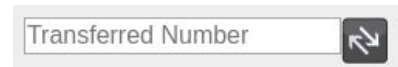


*The illuminated in green, line 2 will transition to gray:*



### Transfer without speaking

1. Click the Transfer without speaking the input button, type the desired number for the transfer.



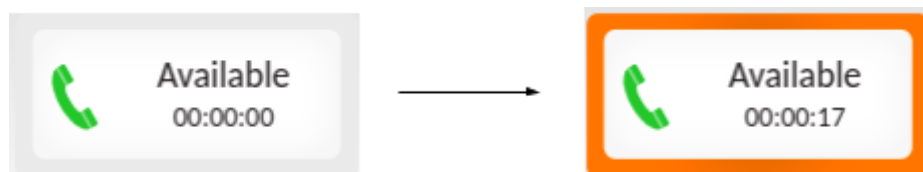
2. Click the transfer button, the following will take place.



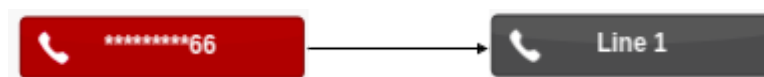
*Wrap-up call status will illuminate:*




*The available button will illuminate again in orange (timer will begin again for available status):*

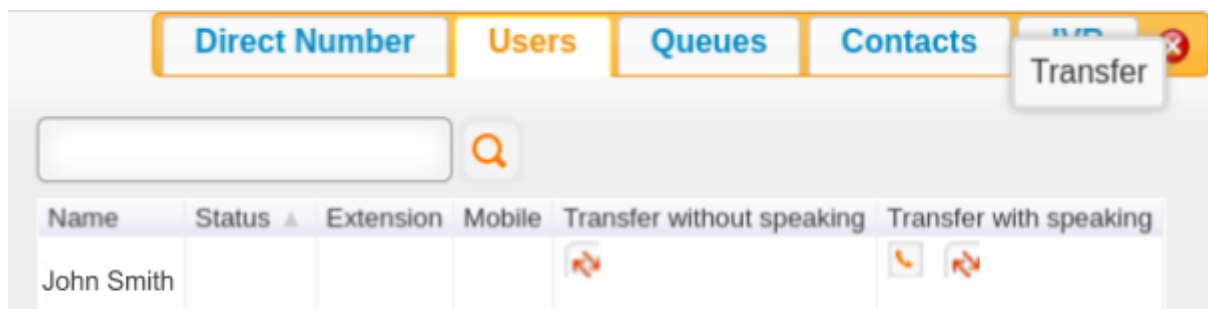


*The illuminated in redline 1 will transition to gray:*



## Users


1. To transfer a call to a Call Center Studio user, click the “Users” tab . The following screen will be shown below:



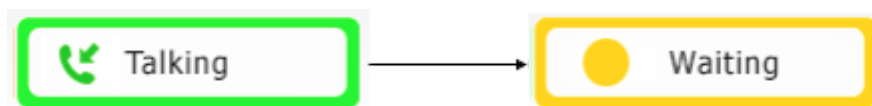
## Transfer with speaking

1. Click the search input, type the desired user’s name, as shown below:

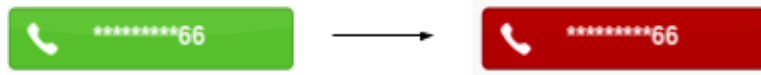


2. Click the call button,  located under the Transfer with speaking column, for the desired user. The following will take place:

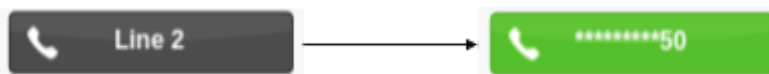
*The talking status will transition to the waiting status, as shown below:*





*Line 1 will be placed on hold:*



*Line 2 will illuminate in green:*



3. Once Line 2 answers the phone, the agent can explain the situation to the user on line 2.
4. After explaining the situation, click the transfer button,  located to the right of the call button , the transition will take place:

*Wrap-up call status will illuminate:*



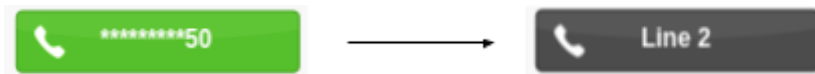
*The available button will illuminate again in orange (timer will begin again for available status):*



*The illuminated in redline 1 will transition to gray:*



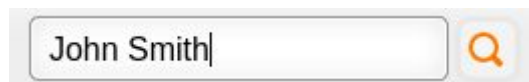
*The illuminated in green line 2 will transition to gray:*




---

### Transfer without speaking

1. Click the search input, type the desired user's name, as shown below:

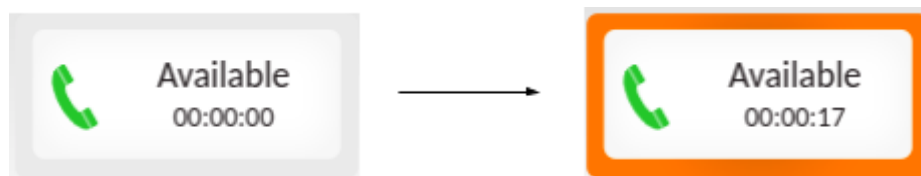


2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

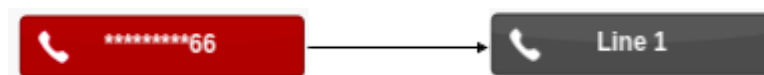
*Wrap-up call status will illuminate:*



*The available button will illuminate again in orange (timer will begin again for available status):*



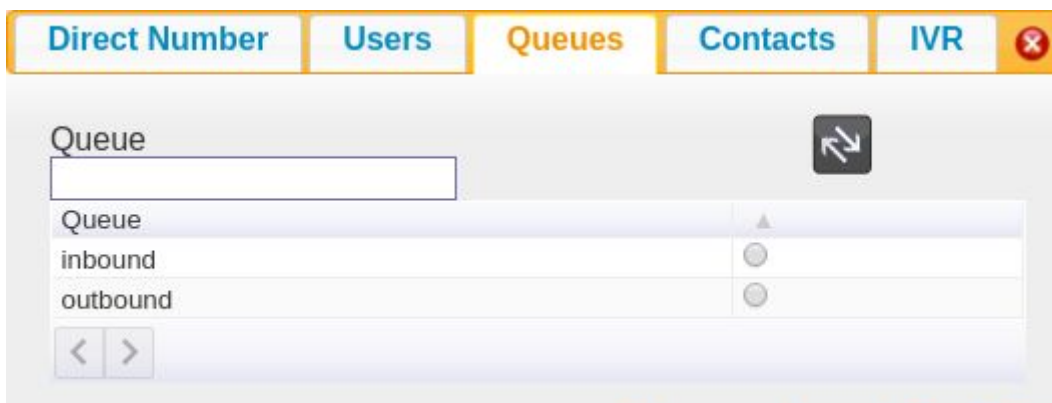
*The illuminated in redline 1 will transition to gray:*



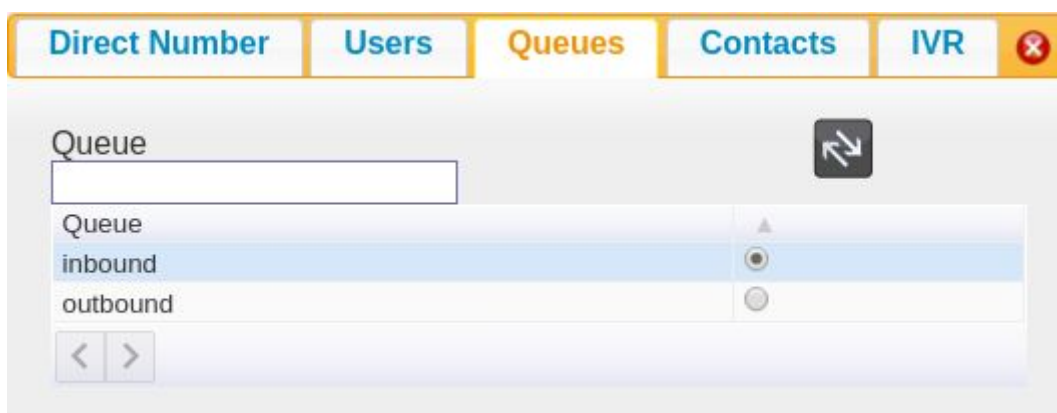


## Queues

1. To transfer a call to another queue, click the queues tab **Queues**. The following screen will be shown below:

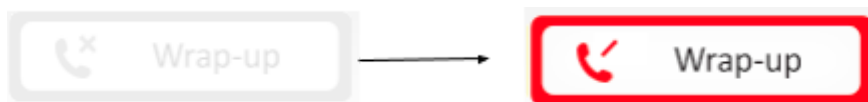


2. Use the search box or directly search for a queue. Click the radio button for the desired queue; an example is shown below:

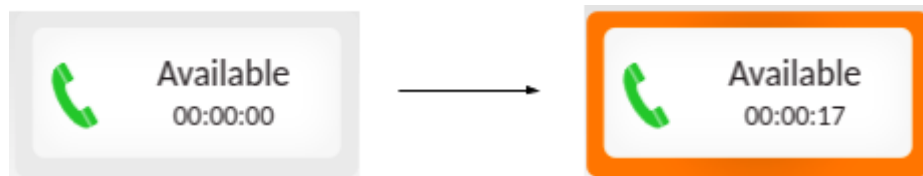


3. Click the transfer button, , the following will take place.

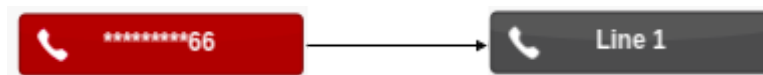
*Wrap-up call status will illuminate:*



*The available button will illuminate again in orange (timer will begin again for available status):*




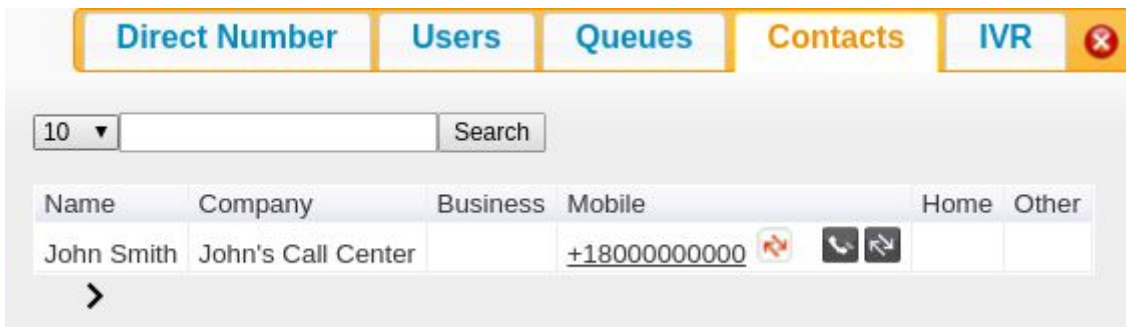
*The illuminated in redline 1 will transition to gray:*



---

## Contacts

1. To transfer a call to contact, click the contacts tab . The following screen will be shown below:



The screenshot shows the 'Contacts' tab selected in the top navigation bar. Below the tabs is a search bar with a dropdown menu showing '10' and a 'Search' button. Below the search bar is a table with columns: Name, Company, Business, Mobile, Home, and Other. The table contains one row for 'John Smith' with company 'John's Call Center' and mobile number '+18000000000'. To the right of the mobile number are three icons: a red 'X', a black phone handset, and a black double-headed arrow. Below the table is a right-pointing arrow icon.


Name	Company	Business	Mobile	Home	Other
John Smith	John's Call Center		+18000000000		

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### Transfer with speaking

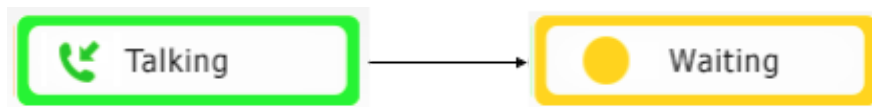
1. Click the search input, type the desired contact's name, as shown below:



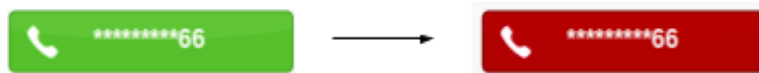
2. Click the call button,  located under the mobile column, for the desired contact.

The following will take place:

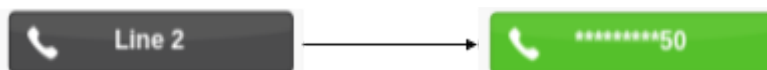
*The talking status will transition to the waiting status, as shown below:*





*Line 1 will be placed on hold:*



*Line 2 will illuminate in green:*



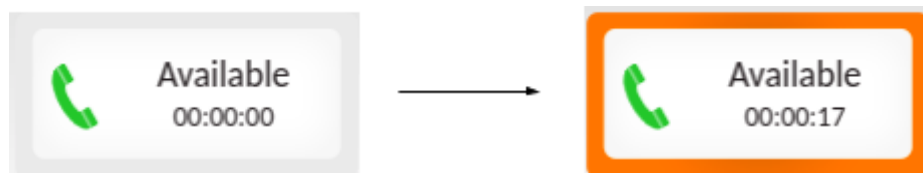
3. Once Line 2 answers the phone, the agent can explain the situation to the contact on line 2.

4. After explaining the situation, click the transfer button,  located to the right of the call button , the transition will take place:

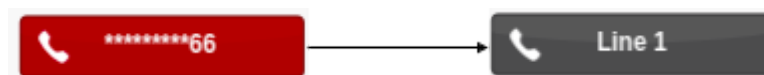
*Wrap-up call status will illuminate:*



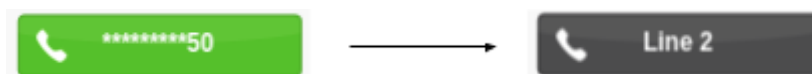
*The available button will illuminate again in orange (timer will begin again for available status):*



*The illuminated in redline 1 will transition to gray:*



*The illuminated in green line 2 will transition to gray:*




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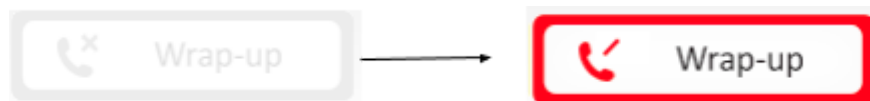
### Transfer without speaking

1. Click the search input, type the desired contact's name, as shown below:

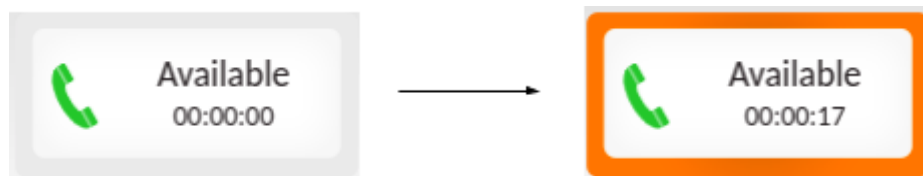


2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

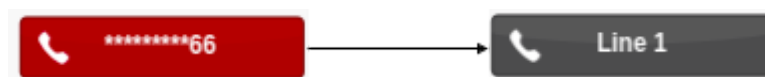
*Wrap-up call status will illuminate:*



*The available button will illuminate again in orange (timer will begin again for available status):*




*The illuminated in redline 1 will transition to gray:*



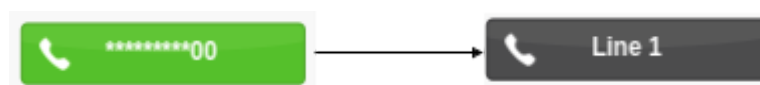
## IVR

1. To transfer a call to an IVR, click the contacts tab **IVR**. The screen below shows some IVR examples:



2. Click the radio button, ☐, for the desired IVR.
3. Click the transfer button, . The following transitions will occur:

*The illuminated in green line 1 will transition to gray:*



*The Call Timer will stop the call, as shown below:*

00:00:10

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*Note: The call timer will display the most recent call time.*

*Wrap-up call status will illuminate:*



### **Making a Conference Call**

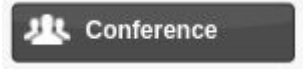
Conference calls are used so that the agent can talk to two people at the same time, such as a supervisor and a customer. There are two ways to perform a conference call:

- Using the Transfer button
- Using Line 2 directly



### Using the Transfer button

1. After placing or receiving a call on line 1, click the transfer button (any of the transfer methods that provide a transfer with speaking option can be used, See *Performing a Call Transfer Section*)
2. After line 2 is in talking status (do not hit the transfer button), click the conference

button, , the following transitions will take place:

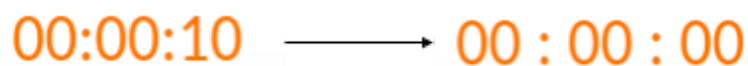
*Line 1 will change to green, indicating that the conference call is now active on line 1:*



The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:



The Active calls will be displayed like the example below:

Active Calls

Active Chats

Performance

Previous Calls

Queues

Team

My Messages

Evaluations

IVR Apps




Chat Bar

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****54	talking	2020-05-11 16:26:59	2020-05-11 16:27:44	outbound	X	<div>Tag</div>				<div></div>
15125721095	*****53	hold	2020-05-11 16:26:17	2020-05-11 16:26:34	outbound	X	<div>Tag</div>				<div></div>

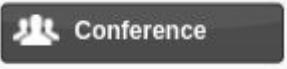
*Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.*

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Using Line 2 Directly

1. After placing or receiving a call on line 1, click the hold button, .
2. Click, Line 2, .
3. Click the phone number input box, , type the desired phone number using the Dialer (as displayed in the softphone image) or a computer keyboard, an example is shown below:

+18140000000|

4. Once Line 2 's in taking status, click the conference button, , the following transitions will take place:

*Line 1 will change to green, indicating that the conference call is now active on line 1:*





The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:

00:00:10 → 00 : 00 : 00

The Active calls will be displayed like the example below:

<div> <div>Active Calls</div> <div>Active Chats</div> <div>Performance</div> <div>Previous Calls</div> <div>Queues</div> <div>Team</div> <div>My Messages</div> <div>Evaluations</div> <div>Chat Bar</div> </div>											
IVR Apps											
Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****54	talking	2020-05-11 16:26:59	2020-05-11 16:27:44	outbound	X	Tag				
15125721095	*****53	hold	2020-05-11 16:26:17	2020-05-11 16:26:34	outbound	X	Tag				

*Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.*