



Advanced Center Agent User Guide

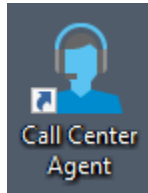
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Call Center Agent Application

The Advanced Call Center uses a separate system to route calls and therefore requires the use of an application different from the MaxUC Client. If you are a MaxUC softphone user, this application will be used in addition to MaxUC.

You will find a Call Center Agent program on your desktop or in your Start menu.

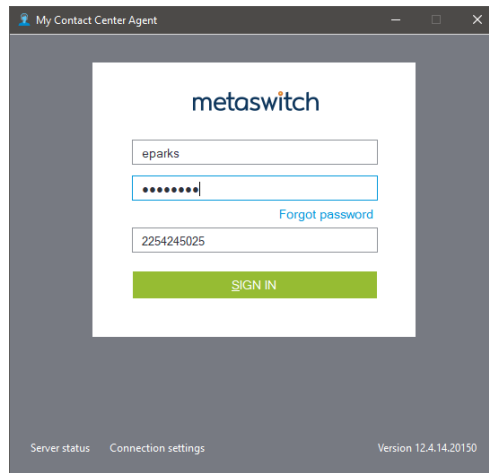


The screenshot shows the "My Contact Center Agent - Available" window. The interface includes a user profile section, a status indicator, and a table of queue information. Red callout boxes point to various elements: "Logged In User" points to the user name; "Current State" points to the "Available" status; "Available Queues" points to the table; "Queue Information" points to the table headers; "Menu" points to the top right menu icon; "Chat" points to the chat icon; "Outbound Dialer" points to the dialer icon; and "Phonebook" points to the phonebook icon.

Queue	Type	Calls	Wait Time	Agents	Available
Default chat queue	Chat	0	00:00:00	2	2
Default email queue	Email	0	00:00:00	2	2
Loan Officers	Voice	0	00:00:00	2	2
PALs	Voice	0	00:00:00	2	2

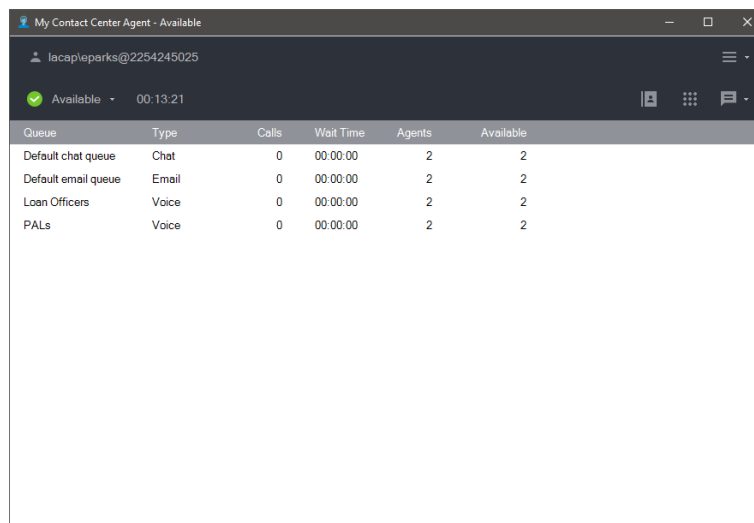
Logging in and Out

When you open the Call Center Agent application, you will be presented a login screen.



Enter your login credentials and include the phone number where you will be taking calls. Most of the time, the phone number will be your direct phone number and the last number used will stay in place. Should you be taking calls at a different location, be sure to change the phone number to the new number.

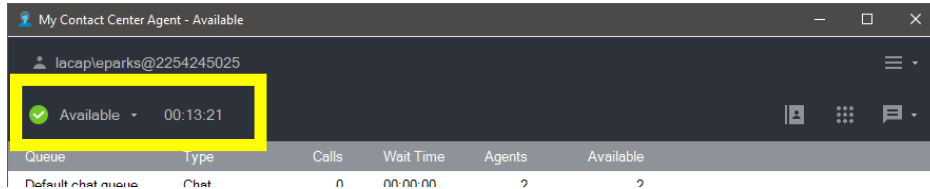
Once you are logged in, you will be shown the Agent Screen with your Current Status and available queues. At the top-left, you will also see the phone number used when logging in so you can confirm it is correct.



To log out of the Call Queues, go to the 3-bars Menu (top-right) and select either *Sign Out* or *Exit*. You may also close the application using the X on the window and you will be asked to confirm your choice.

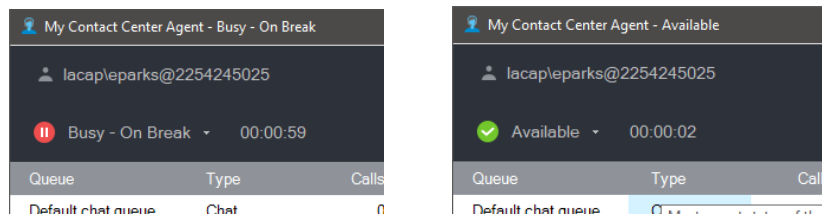
Changing Availability

Once you are logged in, your Availability state will be indicated at the top-left of the window, right above the list of queues.



Going Unavailable

By clicking, the icon or the word for the state will toggle your state between *Available* and *Busy – On Break*.

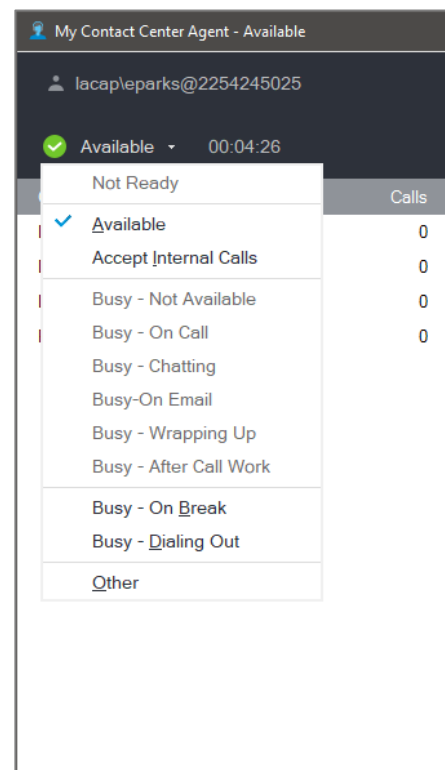


Other Unavailable States

If you click the down arrow next to the State, you will see several other choices. Any of the grayed-out options will automatically be selected based on whether you are on a call, in wrap-up, or other state. You may select any of the other choices depending on what you are doing at a particular time.

If more States are added for additional choices (i.e. – At Lunch), these states will be added under the *Other* category.

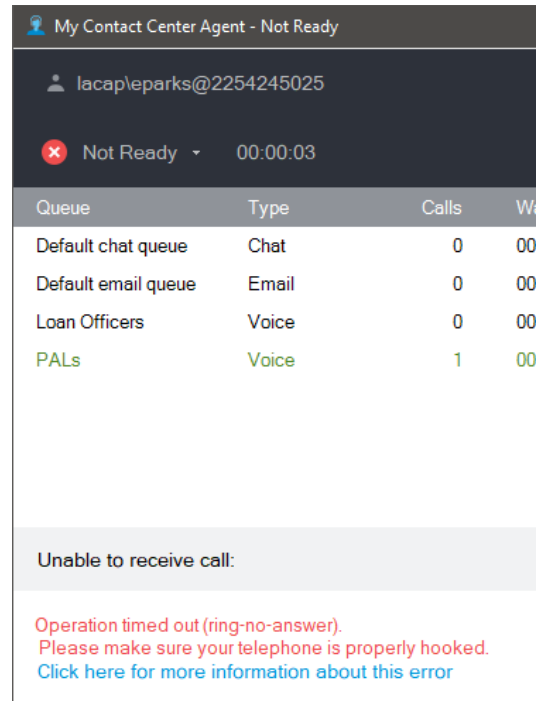
Note that you will not receive call unless you are in an Available state.



Missed Calls

If you are presented a call and you do not answer the call, the system will automatically place you into a Not Ready state.

If you are ready to take calls again, be sure to click the Status icon to return you to an Available state.



The screenshot shows the 'My Contact Center Agent - Not Ready' interface. At the top, the agent's email is 'lacapleparks@2254245025'. Below that, a status bar shows 'Not Ready' with a red 'x' icon and a timer of '00:00:03'. A table below lists the agent's current queue assignments:

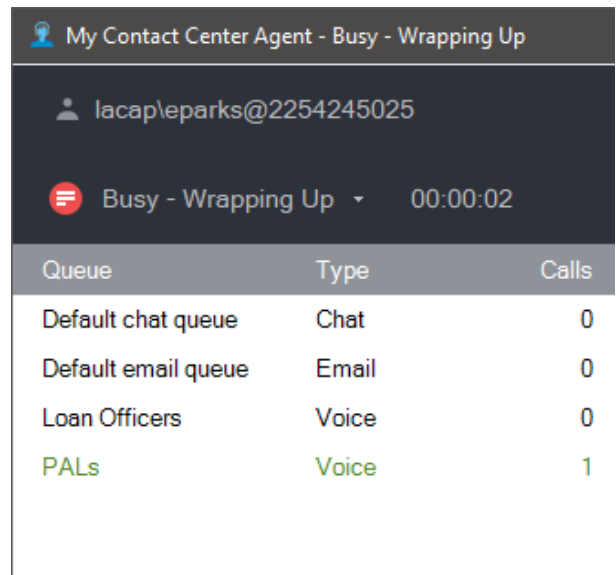
Queue	Type	Calls	W
Default chat queue	Chat	0	00
Default email queue	Email	0	00
Loan Officers	Voice	0	00
PALs	Voice	1	00

Below the table, a message states: 'Unable to receive call: Operation timed out (ring-no-answer). Please make sure your telephone is properly hooked. Click here for more information about this error'.

Wrap Up

When you complete a call, you will be placed into a Wrap Up state. During this time, you are considered Not Available and you will not be presented a call. This time is given to you after a call to allow you time to finish up any work from the call before another call is sent to you.

If you are ready to take another call before the timer expires, you may manually click the Status button to return you to an Available state.



The screenshot shows the 'My Contact Center Agent - Busy - Wrapping Up' interface. At the top, the agent's email is 'lacapleparks@2254245025'. Below that, a status bar shows 'Busy - Wrapping Up' with a red '≡' icon and a timer of '00:00:02'. A table below lists the agent's current queue assignments:

Queue	Type	Calls
Default chat queue	Chat	0
Default email queue	Email	0
Loan Officers	Voice	0
PALs	Voice	1

Receiving Calls and Call Control

When you are Available and are presented a call, the call will ring to your desk or softphone and you may answer it normally.

Incoming Calls

In the Call Center Agent application, information on the call will be displayed at the bottom of the screen.

Live Queue Stats

Queue	Type	Calls	Wait Time	Agents	Available
Default chat queue	Chat	0	00:00:00	2	1
Default email queue	Email	0	00:00:00	2	1
Loan Officers	Voice	0	00:00:00	2	1
PALS	Voice	1	00:00:04	2	1

A call is being transferred, please wait...

Queue and Caller ID

PALS
GAGE TELEPHONE 2257534243 - USA (Louisiana)

Once you are connected to a call, the Call Control options will then be displayed.

Updated Status

Queue	Type	Calls	Wait Time	Agents	Available
Default chat queue	Chat	0	00:00:00	2	0
Default email queue	Email	0	00:00:00	2	0
Loan Officers	Voice	0	00:00:00	2	0
PALS	Voice	0	00:00:00	2	0

Call Control Buttons

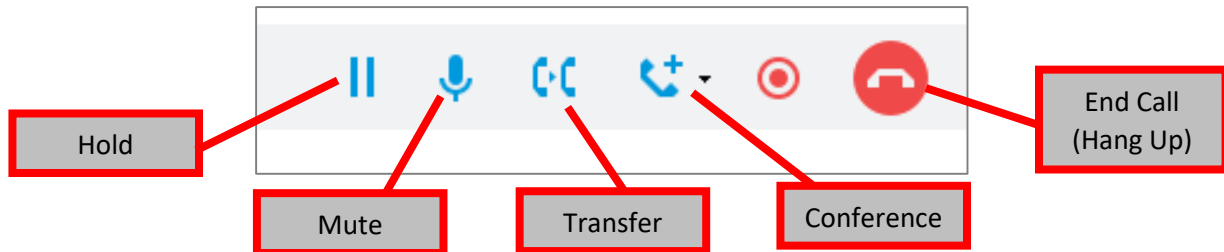
Current Call Information: [Pause] [Mute] [Hold] [Transfer] [End Call]

Queue and Caller ID


PALS
GAGE TELEPHONE 2257534243 - USA (Louisiana)

Call Control Options

When connected to a call, you will use the Call Control buttons throughout the life of the call. All your commonly used call control options are available within the Call Center Agent screen. If you hover over each of the icons, it will pop up a bubble with a description of what each button does.




Hold

Press the Hold (pause) button the caller will then hear the Message on Hold. The Hold button will then change to what looks like a Play button. 

To resume the call, press the Resume (play) button and the call will again be connected.

Mute

Pressing the Mute (microphone) button will mute your side of the conversation and the caller will not be able to hear you. The caller is not on Hold and will hear silence while you are muted. When activated, the icon will turn RED. 

Click the same button again to unmute yourself.

Transfer

If you need to transfer the call, click the Transfer button and the Transfer Call window will open up giving you choices on how and where to send the call.

Destination – Selecting *Queue* will display a list of the other configured Advanced Call Queues within the system. You can also see if there are agents logged in and available as well as if there are other calls waiting.

To transfer to a specific Queue, highlight the queue and click OK. The call will begin ringing to an available agent in that queue or be placed in line if not.

When choosing Third Party for the Destination, you then have other options for the Transfer.

The Transfer Type can be either *Blind/Cold* or *Controlled/Warm*. A Blind transfer will begin to ring the destination immediately and disconnect your phone. A Controlled transfer allows you to stay on the line to announce the call before connecting it to the destination.

The Destination Number is where you will enter where you will be sending the call. This can be internal extension numbers, internal direct phone numbers, or external phone numbers. The pull-down will keep the latest numbers for where you have sent calls. You may also use Speed Dials if they are configured or select a record from the Phone Book.

Click OK to complete the Transfer. If *Controlled/Warm* Transfer is chosen, it will have you confirm when to connect the caller to the destination.

The screenshot shows the 'Transfer Call' dialog box. Under 'Destination', the 'Third Party' radio button is selected. Under 'Transfer Type', the 'Controlled/Warm' radio button is selected. The 'Caller ID Options' section has 'Use default' selected. The 'Destination Number' field is empty. There is a 'Speed Dial' section with two empty input fields. A 'Phone Book...' button is visible at the bottom right. 'OK' and 'CANCEL' buttons are at the bottom.

The screenshot shows the 'Transfer Call' dialog box with the 'Queue' radio button selected. A message says 'Select this option to send the caller back to a queue'. Below is a table titled 'Available Queues':

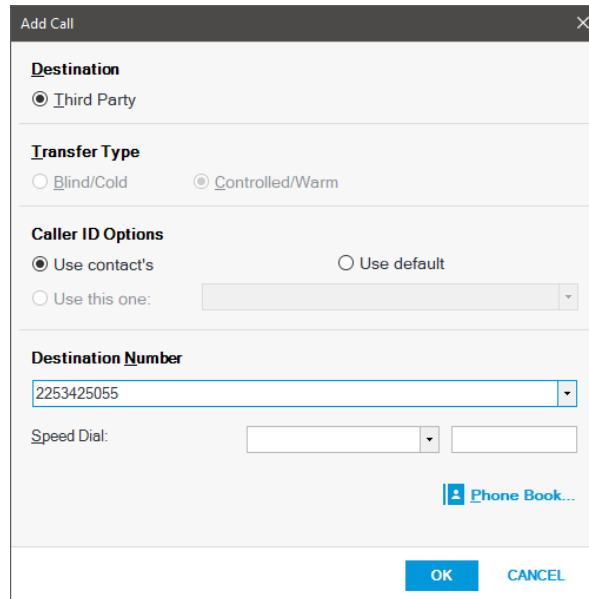
Queue	Calls	Agents	Available
Collections	0	0	0
Indirect Lending	0	0	0
Loan Officers	0	2	0
PALs	0	2	0
Plastics	0	0	0
Real Estate	0	0	0

'OK' and 'CANCEL' buttons are at the bottom.

The screenshot shows the 'Transfer Call' dialog box. Under 'Destination', the 'Third Party' radio button is selected. Under 'Transfer Type', the 'Blind/Cold' radio button is selected. The 'Caller ID Options' section has 'Use contact's' selected. The 'Destination Number' field contains '2253425055'. There is a 'Speed Dial' section with two empty input fields. A 'Phone Book...' button is visible at the bottom right. 'OK' and 'CANCEL' buttons are at the bottom.

Conference Calls

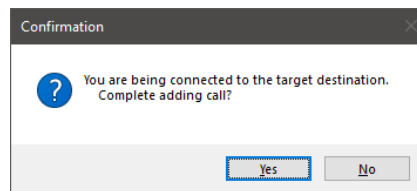
You may Add another person to the Live Call by using the Add Call (conference) button. Clicking the button will bring up the Add Call dialog box.



Enter the phone number to Add to the call in the Destination Number field. This can be internal extension numbers, internal direct phone numbers, or external phone numbers. The pull-down will keep the latest numbers for where you have sent calls. You may also use Speed Dials if they are configured or select a record from the Phone Book.

Click OK when finished. The original call will be placed on Hold and a call will begin ringing to the second participant.

You will then be prompted to Complete Adding the Call. Click Yes when the second participant answers and you are ready for them to join the call.



As more calls are added, you may remove certain participants by clicking the down arrow next to the Conference button. A list of participants are shown and you can choose which participant to remove from the list.

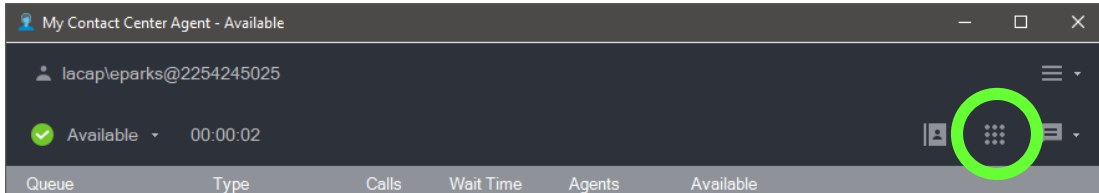


Placing Outbound Calls

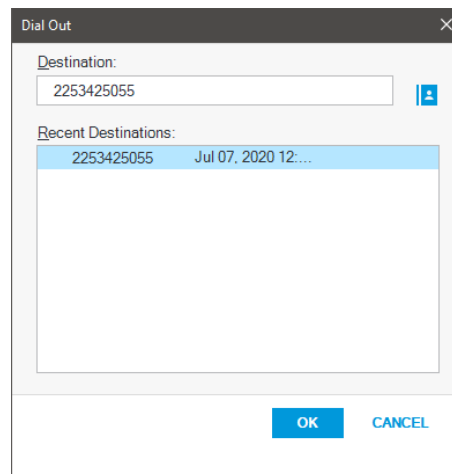
If you need to place an outbound call, you do have the option to use the desk or softphone to make the call. However, the Advanced Call Queue does not know that you are on a call and may send a call to you while you are on the phone.

To prevent this, you will need to initiate the call through the Call Center Agent application.

Open the dialer by clicking the Dial Pad found at the top-right of the application.



You will then be shown the dialer window where you will input the number you wish to call. This can be internal extension numbers, internal direct phone numbers, or external phone numbers. The Recent Destinations will keep the latest numbers you've dialed for quick access. You may also use the Phone Book.



Click OK when finished entering the phone number and your desk or softphone will begin to ring. When you answer, the call will begin to ring to the destination.

Should you need to make menu choices with key presses, use the dial pad on the desk or softphone.

There is no dial pad option in the Call Center Agent application.

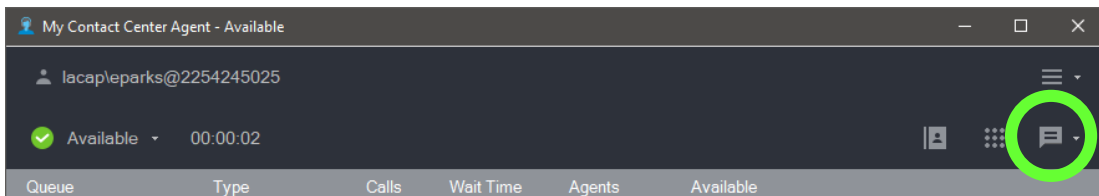
When connected, all Call Control options will become available.

Internal Chat

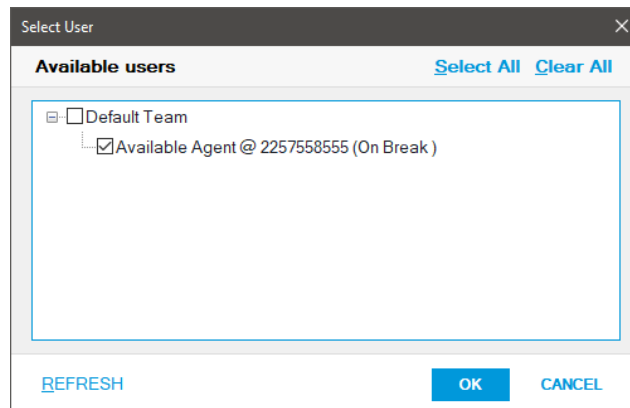
The system has an Internal Chat function that will be used for chatting with other Advanced Call Center Agents as well as chats with outside parties.

You will not be able to chat with other MaxUC clients through the application.

To initiate a chat with another Advanced Call Center Agent, click the Chat button found at the top-right of the application window.



You will be shown a list of all other Agents that are signed in along with their current state.



Select an available team member from the list, click OK, and a chat window will open.

