EVOLVE IP
WORK ANYWHERE™

Evolve Contact Suite: eAgent

Users Guide v5.22.1

www.evolveip.net | info@evolveip.net | 1.877.459.4347

EVOLVE IP, LLC

Evolve Contact Suite: eAgent Users Guide v5.22.1

© Evolve IP, LLC

CORPORATE HEADQUARTERS

630 Allendale Road

King of Prussia, PA 19406

Main Phone: 610-964-8000

PAGE LEFT
INTENTIONALLY
BLANK

Table of Content

Getting Started....2
Introduction....3
Overview....3
General Agent Information....6
Agent FAQs....7
Are there currently any Known Limitations....12
Known Limitations....12
Outstanding Bugs....13
Agent Intelligence Center....14
Overview....14
Editing the Agent Overview....15
Add a New Card....17
Restore to Default....20
Add a New Dashboard....21
Adding a New Dashboard....21
Deleting a Dashboard....23
Agent Profile....25
Overview....25
Adding an Agent Avatar....25
Contacts....28
Using Contacts....28
Directory Tab....29
Contacts Tab....30
Searching for a Contact....31
Adding and Removing a Favorite....33
CRM Panel....36
Overview....36
Contacts....37
History....38
Notes....40
Handling Callback Interactions....41
Overview....41

Assigning Callbacks 43
Active Interaction 43
Historical Interactions 45
Callback Panel 47
Handling Callbacks 50
Handling Call Interactions 55
Telephony Interaction View 55
Call Interaction Sidebar 57
Active Call Interactions 57
Call History 58
Incoming Call Interaction 60
Accepting a Call 60
Completing an Interaction 61
Transferring a Call 64
Initiating a Conference 72
Ending a Conference 76
Splitting a Conference 76
Handling Chat Interactions 78
Chat Interaction Interface 78
Chat Panel 79
Pending Chat Interactions 80
Active Chats 81
Chat History 83
Chat Interaction 84
Accepting a Chat Interaction 84
Responding to a Chat 85
Complete an Interaction 87
Transferring a Chat 90
Blind Transfer 90
Consulted Transfer 93
Initiate a Conference 97
End a Conference 101
Split a Conference and Remove Consulted Party 101
Handling Email Interactions 103
Email Interaction Interface 103
Email Panel 104

Pending Email Interactions 105
Active Emails 106
Email History 106
Interact with an Email Interaction 107
Accepting a Email Interaction 107
Reply to an Email 108
Completing an Interaction 112
Transferring an Email 114
Initializing a New Email Interaction 116
Notifications 119
Overview 119
Settings 121
Overview 121

PAGE LEFT
INTENTIONALLY
BLANK

EVOLVE IP, LLC

Evolve Contact Suite: eAgent Users Guide v5.22.1

CONTRIBUTIONS:

Lisa Brown	Tech Writer
Autumn Salama	Content Contributor(s)
Doug Hutchinson	
Mercedes Weathers	

Getting Started

Evolve IP are registered trademarks of Evolve IP, LLC.

Evolve IP is a trademark of Evolve IP, LLC. © 2006-2022 by Evolve IP, LLC. All rights reserved.

Any technical documentation that is made available by Evolve IP, LLC is proprietary and confidential and is considered the copyrighted work of Evolve IP, LLC.

This publication is for distribution under Evolve IP non-disclosure agreement only. No part of this publication may be duplicated without the express written permission of Evolve IP, LLC 630 Allentown Road, King of Prussia, PA 19406.

Evolve IP reserves the right to make changes without prior notice.

The electronic version (PDF) of this document may be downloaded and printed for personal use or stored as a copy on a personal machine. The electronic version (PDF) of this document may not be distributed. Information in this document is subject to change without notice and does not represent a commitment on the part of the vendor. The software described in this document is furnished under a license agreement and may be used or copied only in accordance with the agreement. It is against the law to copy the software on any medium except as specifically allowed in the agreement.

The use of general descriptive names, trade names, trademarks, etc., in this publication, even if the former are not especially identified, is not to be taken as a sign that such names, as understood by the Trademarks and Merchandise Marks Act, may accordingly be used freely by anyone.

Windows is a registered trademark of Microsoft Corporation.

All other trademarks are property of their respective owners.

Introduction

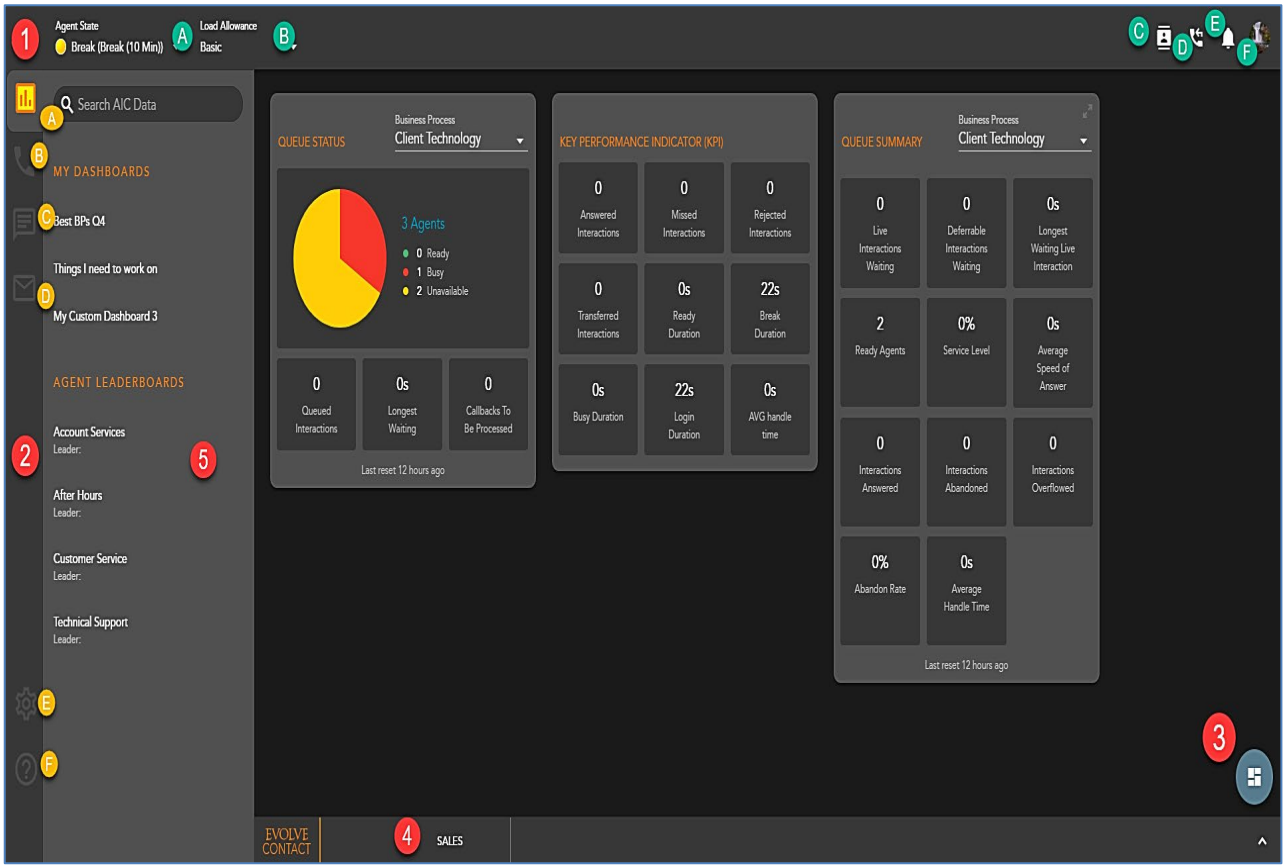
ECS Agent allows agents to use their browser to log in to ECS and respond to interactions.

Agents need a softphone endpoint like UC-One or Microsoft Teams for voice interactions. These clients are available for Windows, Mac, and mobile devices.

ECS Agent does not have native softphone capabilities.

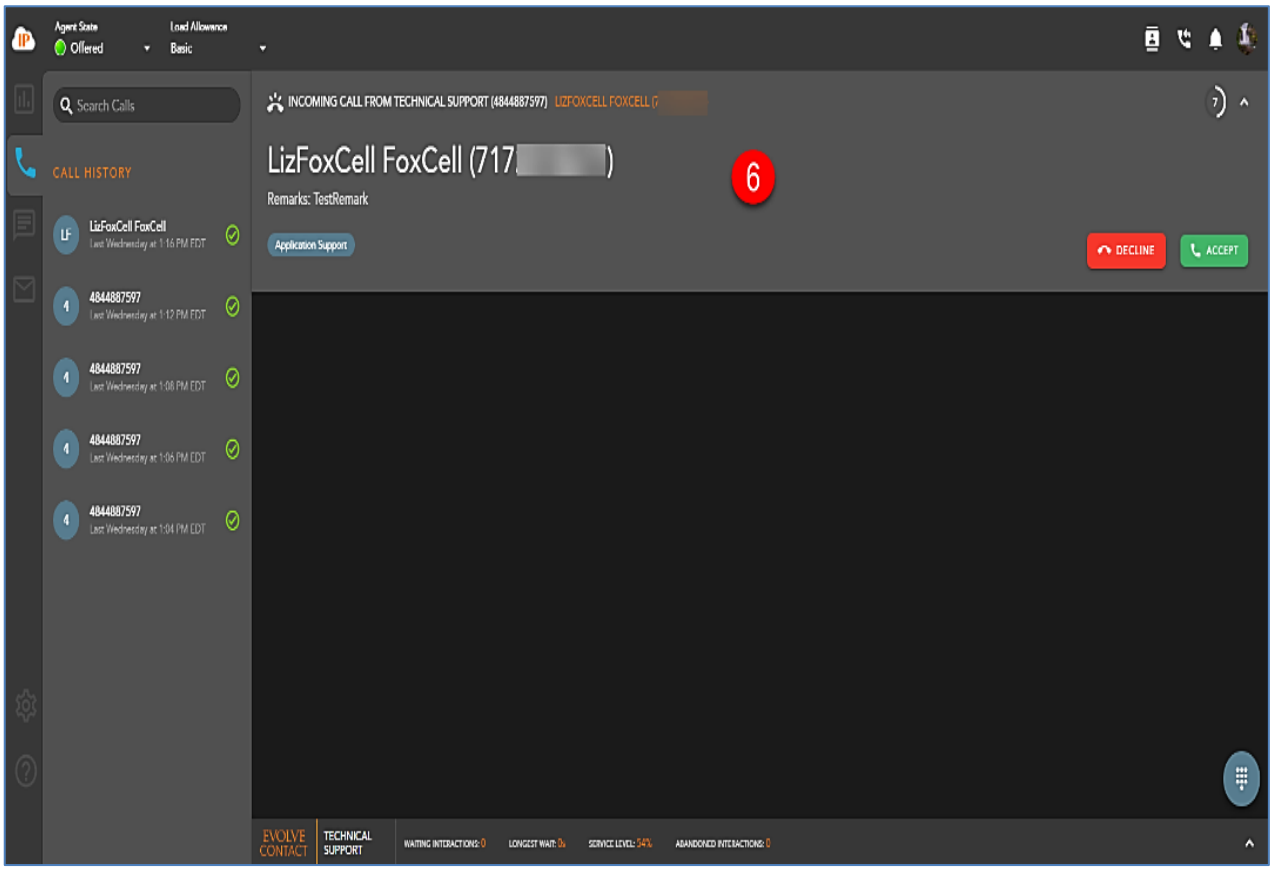
Overview

The Evolve Contact Suite eAgent is an easy to use application designed specifically to meet the needs of contact center agents. It provides agents the features and functionality required to be efficient and productive in a omnichannel contact center.



1. **App Bar** - provides access to key application actions such as Agent State, Contacts, and Notifications
2. **Agent State** - Agent ACD State. Upon first login, the Agent State will always be Offline until manually updated by the agent.

3. **Load Allowance** - Agent's Load Allowance will default to what is configured in the Setup Client. The agent can manually update their load allowance from the drop down if multiple Load Allowances are available.
4. **Contacts** - Consists of an organization's internal contacts including agents, supervisors, Business Processes, channels, and Enterprise directory, as well as the contact centers external address book and CRM contacts.
5. **Callbacks** - Display and manage all agent pending callbacks
6. **Notifications** - Agent notifications
7. **Agent Information and Sign Out** - Basic Agent information, Avatar Management and Agent Sign Out
8. **App Side Bar** - provides high-level navigation between the different Interaction Types, the application settings, and application help
9. Agent Intelligence Center - Default view upon first login. Provides the agent with real time statistics on how the contact center is performing and general agent statistics.
10. **Telephony** - Access to Call History, Dial Pad, and all active Telephony interactions
11. **Chat** - Access to Chat History and active Chat Interactions
12. **Email** - Access to active email interactions. Email will be available in a future release.
13. **Settings** - Manage agent settings such as Theme, Ringtone, and Default Outgoing Business Process CallerID
14. **Help** - Help Content
15. **Floating Action Button** - Provides easy access to relevant actions such as Dashboard Setup with the Agent Intelligence Center or Access the Dialpad
16. **Stats Ticker** - Provides key contact center and agent metrics and the ability to drill into the details for each Business Process
17. **Interaction Side Bar** - Will display all active and historical interactions as well access to the Agent Intelligence Center



18. **Incoming Interaction Banner**: Provides notification and key information about an Interaction being offered such as: Interaction Type, Customer Name and DID or Email Address, Originating Business Process, Interaction Handling Remarks and Demands

19. **Interaction Toolbar** - Provides the most common Interaction handling actions such as transfer or conference
20. **Interaction Window** - Provides Interaction details
21. **Telephony Actions** - Provides call control actions such as hold/resume or mute
22. **Interaction Footer** - Provides navigation between the active interaction and the contact's information and history

General Agent Information

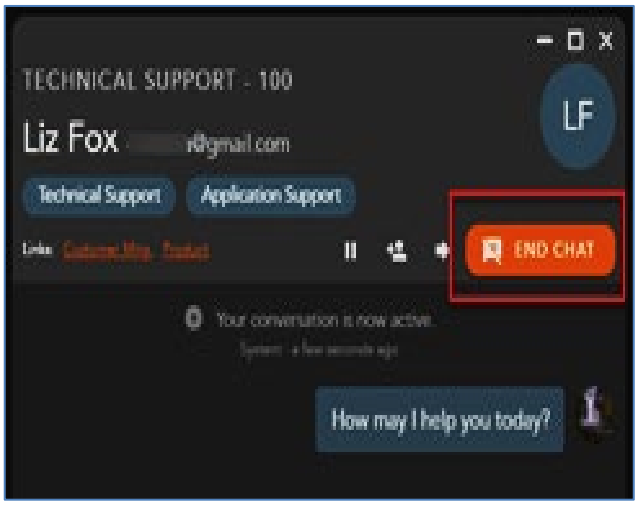
1. Only one instance of the Agent can be open at a time. If an attempt to open another tab of the client, the agent will be logged out of the client on the original tab.
2. If you do not put yourself into an Offline State or Sign Out of the eAgent before exiting out of the browser tab, your agent state will remain active for 30 seconds, before the system automatically puts you into an offline state.

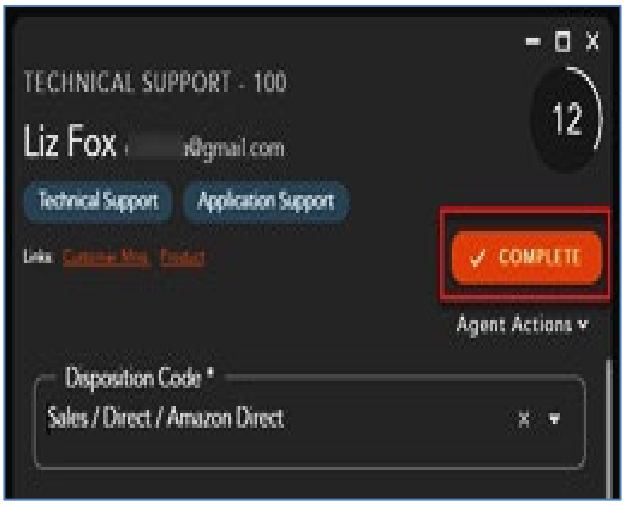
Agent FAQs

- How do I finish an Interaction?
- Why did I receive a message that states "Connection Lost. Attempting to Reconnect"?
- What happens when an Agent "answers" a call by selecting the "Accept" button that appears when a call is being offered to them?
- Can I still access the regular version of the Agent application after I'm given access to the new browser version of the application?
- Why do some users see the ECS Agent tile in Clearlogin even though they are not part of the contact center?
- I enabled Notifications and they are no longer appearing; how do I restore them?
- Are there currently any Known Limitations?
    - Known Limitations
    - Outstanding Bugs

How do I finish an Interaction

Once the interaction has ended, the Interaction Window will default to the Agent Actions screen. If a Disposition Code is mandatory, that must be selected first before the Agent can finish the interaction. To finish the interaction, select Complete in the Interaction Window. This will close the Interaction Window and return the Agent to a Ready state.



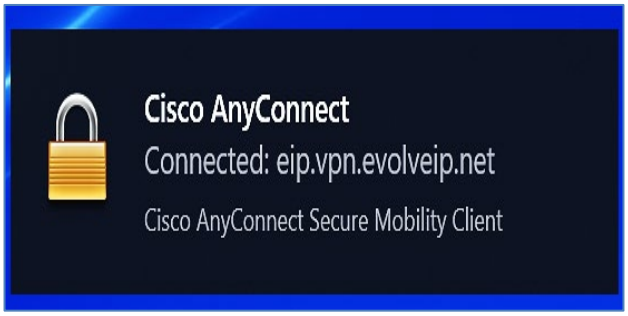


Why did I receive a message that states "Connection Lost. Attempting to Reconnect"

This message indicates that the Agent application detected that the browser is no longer connected to the Internet. The application is attempting to reconnect to the Internet to

restore functionality. Once the Internet connection is restored, the agent application will update to display the latest information.

We recommend turning on Web and OS notifications as well. This will help in notifying you that your connection was lost if you have navigated away from the eAgent browser tab. See below for instructions on how to turn these notifications on. If turned on and you loose connection, you will receive the following two notifications when disconnected and reconnected:



What happens when an Agent "answers" a call by selecting the "Accept" button that appears when a call is being offered to them

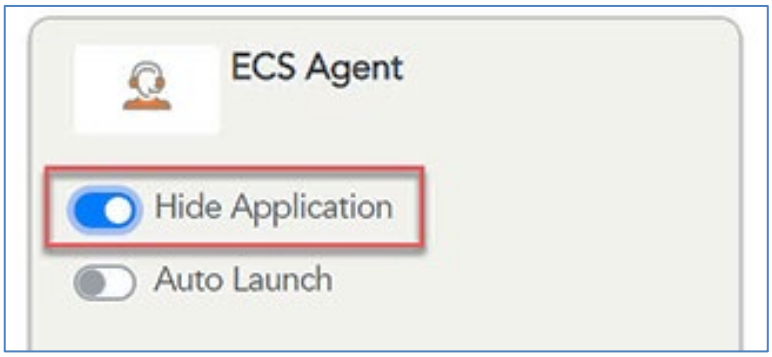
Every HPBX user is configured with a primary device (or end point) that is the default for handling calls. When a call is "Accepted" via the Agent application, the system attempts to answer that call on the user's primary device. Some Agents are configured with multiple devices such as a Handset in the office and UC-One while working from home. If that Agent is working from home (via UC-One) and their primary device is the handset in the office, hitting "Accept" will answer that call on the handset in the office. It is important to ensure that the primary device is properly configured for each Agent by working with Evolve IP's Support team.

Can I still access the regular version of the Agent application after I'm given access to the new browser version of the application

YES both versions of the Agent application are available for use. However, each Agent can only be signed into one version of the application at a time. For example, if an Agent launches the web version of the application while currently signed into the regular Windows version of the application, they will be automatically logged out of the first session.

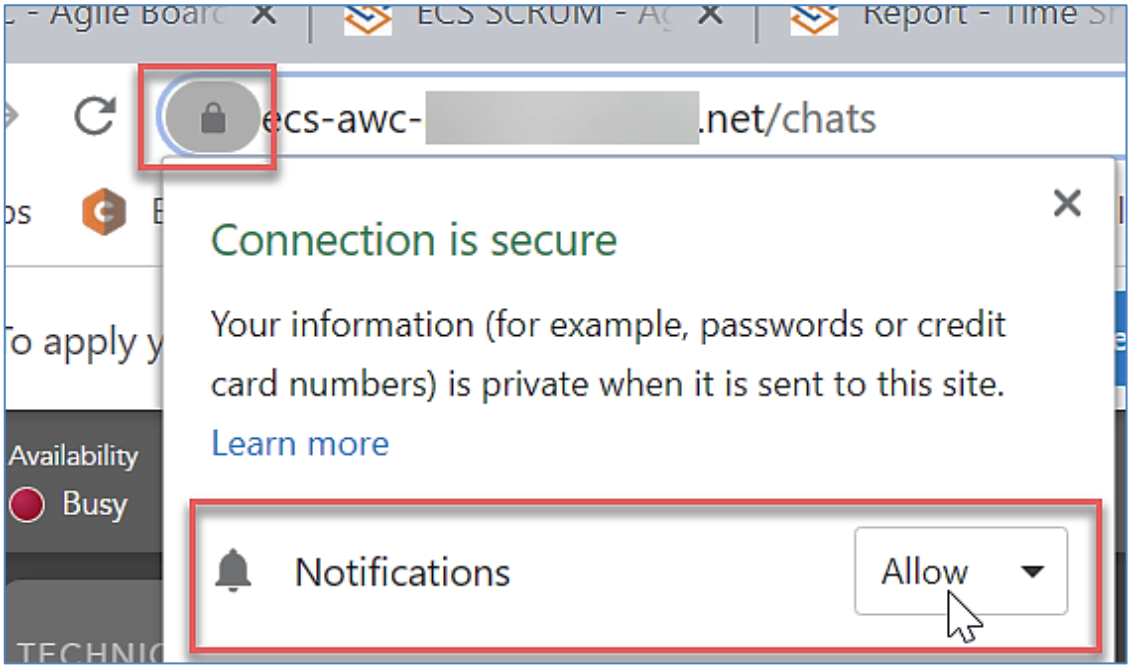
Why do some users see the ECS Agent tile in Clearlogin even though they are not part of the contact center

When the ECS Agent tile is made available, it becomes visible to all members of that organization. However, users outside of the contact center will not be able to login to the Agent application even though they see the tile. In order to open the application, each user must pass a one-time authentication challenge where valid Agent credentials must be entered. Any user that does not need to access the Agent application can hide the tile by selecting 'Hide Application" from the App Manager screen (accessed by selecting the wrench icon).

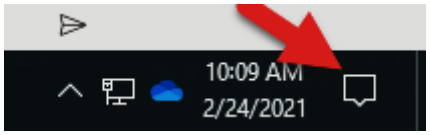


I enabled Notifications and they are no longer appearing, how do I restore them

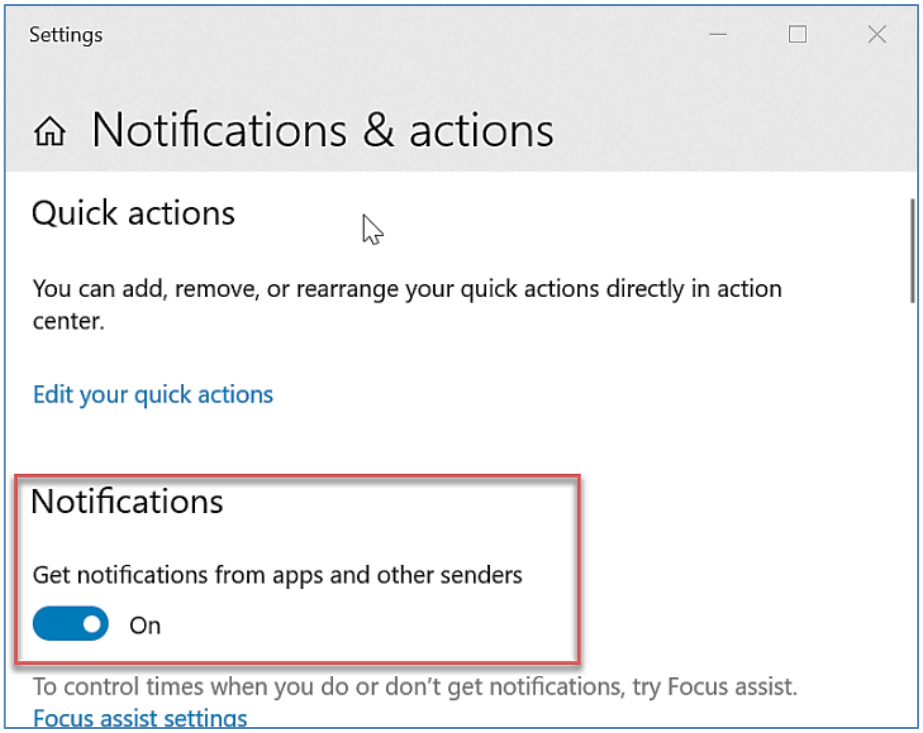
The Notifications can be blocked via the Browser or the underlying operating system (MacOS, Windows, etc.). It is recommended to enable Notifications because they will alert an Agent to an incoming interaction or other important action when they have navigated away from the browser tab. The Notification settings vary by browser and operating system so please consult online help or an Internet search for the exact steps. To restore notifications blocked by the Chrome browser, navigate to Settings > Privacy and Security > Site Settings > Notifications, select the Agent URL (ecs-web.evolveip.net), and select Allow from the options. In Chrome, within the URL if the follow icon is available, you can click on the icon to show whether you have the notifications blocked or allowed. Simply select from the drop down to allow notifications.



You will also need to make sure that you have your OS notifications enabled



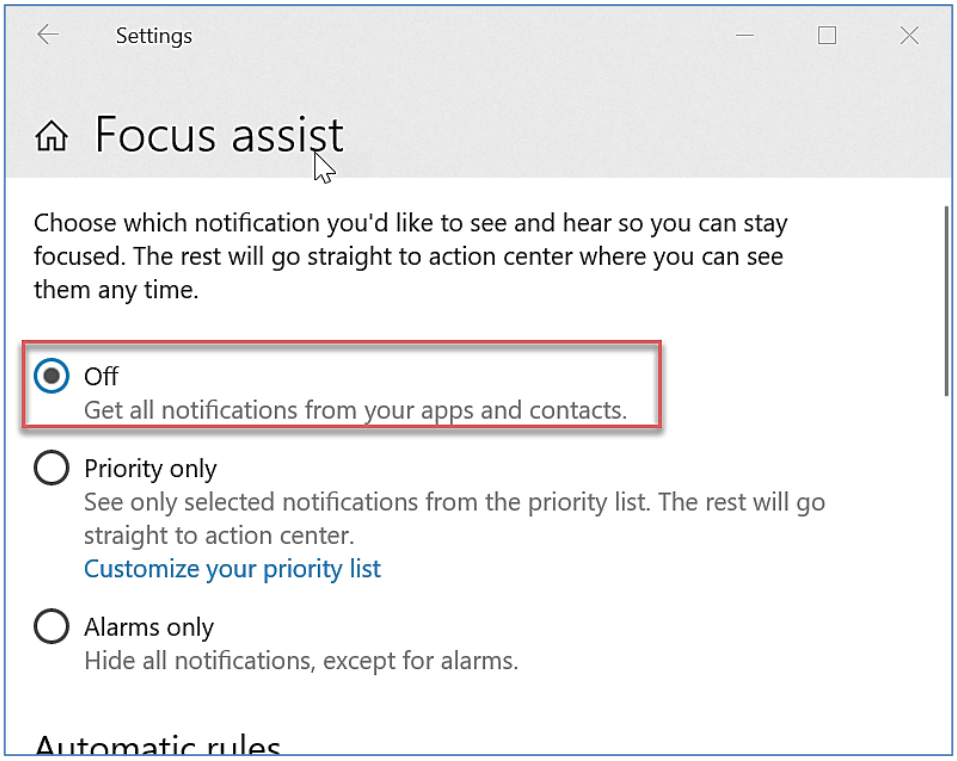
To turn on these notifications, click on the notifications icon > Manage Notifications > Notifications and turn on the notifications.



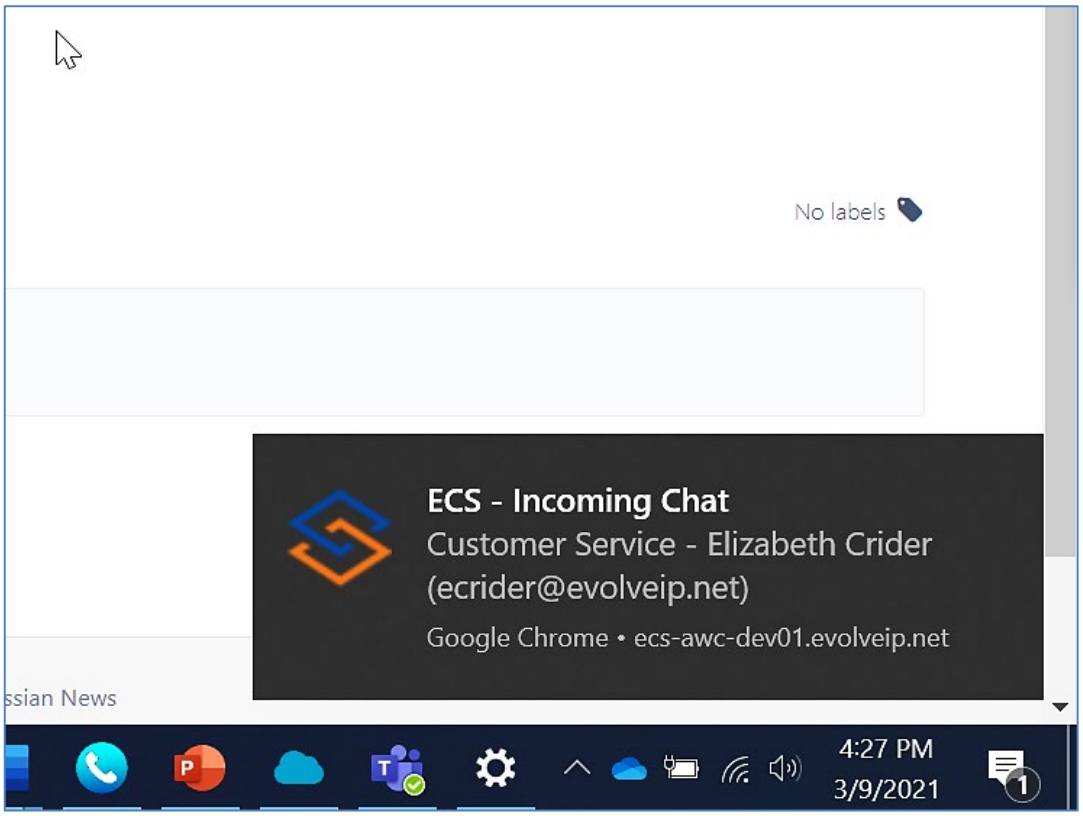
If these have been enabled, but you are still not seeing notifications, you may have Focus Assist on, suppressing the notifications, indicated by the following icon

within the OS notifications icon.

To manage and turn the focus assist off, click on Focus Assist Settings and turn focus assist off.



Once everything has been enabled correctly, when you navigate away from the eAgent Browser tab and receive and incoming interaction, you will get the following notification.



Are there currently any Known Limitations

Known Limitations

4-way Conference Calling	Cannot initiate a 4-way Conference call. If needed, the agent can sign into the .Net client and perform a 4-way conference call. This is a future feature enhancement for the eAgent.
Outbound Campaign Calls (Dialer)	Current limitations on answering Campaign calls in the eAgent for full feature functionality.
DTMF	Agent cannot perform a DTMF action through the eAgent. They can perform DTMF on their UC One, Teams or Handset. This is future feature enhancement for the eAgent.
WAV File	Agents cannot play a WAV file to an active caller.

Internal Softphone	The application does not support the Internal Phone (integrated softphone) – all calls must be delivered to a separate endpoint (e.g. handset, mobile phone, UC-One, Teams etc.).
Answer on UC One	Can only answer on a primary device. Shared Call Appearance phones, UC One and Teams need to be answered directly on the device.
Auto Screen Pop	The agent must click on the links found in the active interaction window to launch a URL.
Clipboard Integration	Agents must manually enter in or copy and paste a number to place an outgoing call.

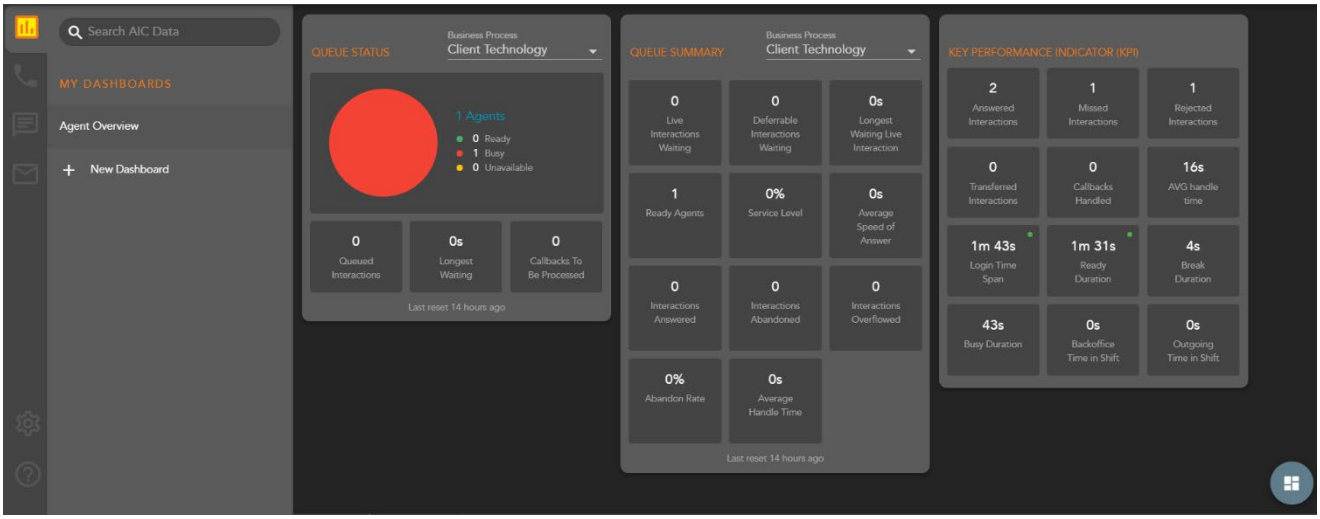
Outstanding Bugs

Agent Statistics	Some Business Process and Agent KPI statistics are not updating in real time	Resolved with ECS 5.3.3 release and eAgent Version Release
Default Outgoing Telephony Business Process	Changing the Default Outgoing Telephony Business Process does not properly save in settings.	Upcoming patch release - TBD
SMS/Email Media Type	Will not be fully developed until after the ECS 5.3.3 Release	

Agent Intelligence Center

Overview

The Agent Intelligence Center is the default view when the agent first logs in. The initial dashboard, Agent Overview, provides the agents with real time statistics on how the contact center is performing and agent statistics, specific to the logged in agent. On initial login the agent application will create a default dashboard view: Agent Overview. This view will consist of one Queue Status, Queue Summary, and Key Performance Indicator (KPI) card. Each queue card will initially default to the first alphabetical Business Process an agent is assigned.



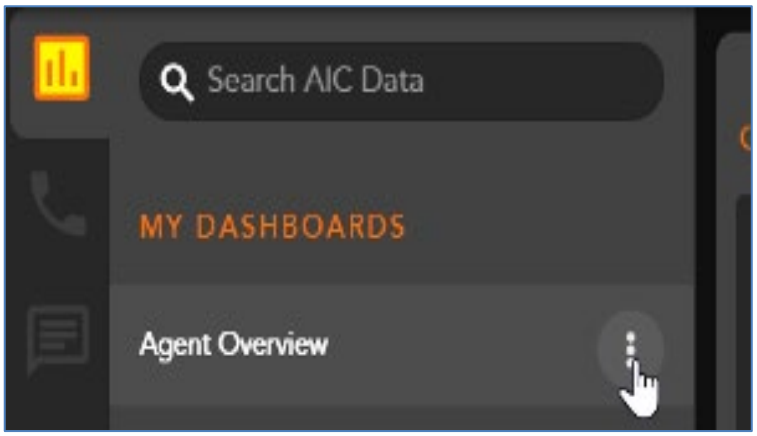
1. **Queue Status** - provides real time stats on the selected Business Process including:
    a. Agents in a Ready, Busy or Unavailable state
    b. Queued Interactions - total number of queued interactions waiting to be handled by an agent
    c. Longest Waiting (interactions) - the amount of time the longest waiting interaction has been waiting in Queue
    d. Callbacks To Be Processed - number of callbacks waiting to be processed
2. **Queue Summary**- provides real time and summary stats on the selected Business Process including:
    a. Live Interactions Waiting - total number of interactions waiting in queue to be handled by an agent
    b. Deferrable Interactions Waiting - total number of deferrable interactions waiting in queue to be handled by an agent
    c. Longest Waiting Live Interaction - the amount of time the longest waiting interaction has been waiting in Queue

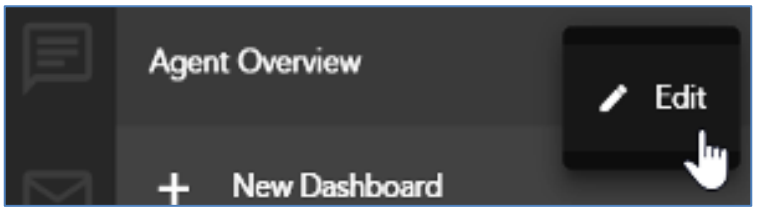
d. Ready Agents - total number of Ready agents within the Business Process
e. Service Level % - the percentage of inbound interactions that entered the queue and an agent responded within the specified time goal
f. Average Speed of Answer - average amount of time that a contact waited before an agent answered the interaction
g. Interactions Answered - total number of answered interactions
h. Interactions Abandoned - any interaction that entered the queue and was abandoned by the contact before reaching an agent
i. Interactions Overflowed - total number of overflowed interactions
j. Abandon Rate % - the number of abandons / number of queued interactions
k. Average Handle Time - Calculated as sum of talk + hold + wrap / the count of queued calls that were answered

3. **Key Performance Indicator (KPI)** - provides real time and summary stats on the agent's performance including:
   a. Answered Interactions - total number of interactions answered by the agent
   b. Missed Interactions - total number of interactions missed by the agent
   c. Rejected Interactions - total number of interactions rejected by the agent
   d. Transferred Interactions - total number of interactions transferred by the agents
   e. Callbacks Handled - total number of callbacks handled by the agent
   f. Average Handle Time - agents sum of talk + hold + wrap up / the count of queued interactions the agent answered
   g. Login Time Duration - total amount of time the agent as been logged in
   h. Ready Duration - total amount of time spent in a Ready state
   i. Break Duration - total amount of time spent in a Break state
   j. Busy Duration - total amount of time spent in a Busy state
   k. Backoffice Time Duration - total amount of time spent in the Backoffice state
   l. Outgoing Time Duration - total amount of time spent in the Outgoing state

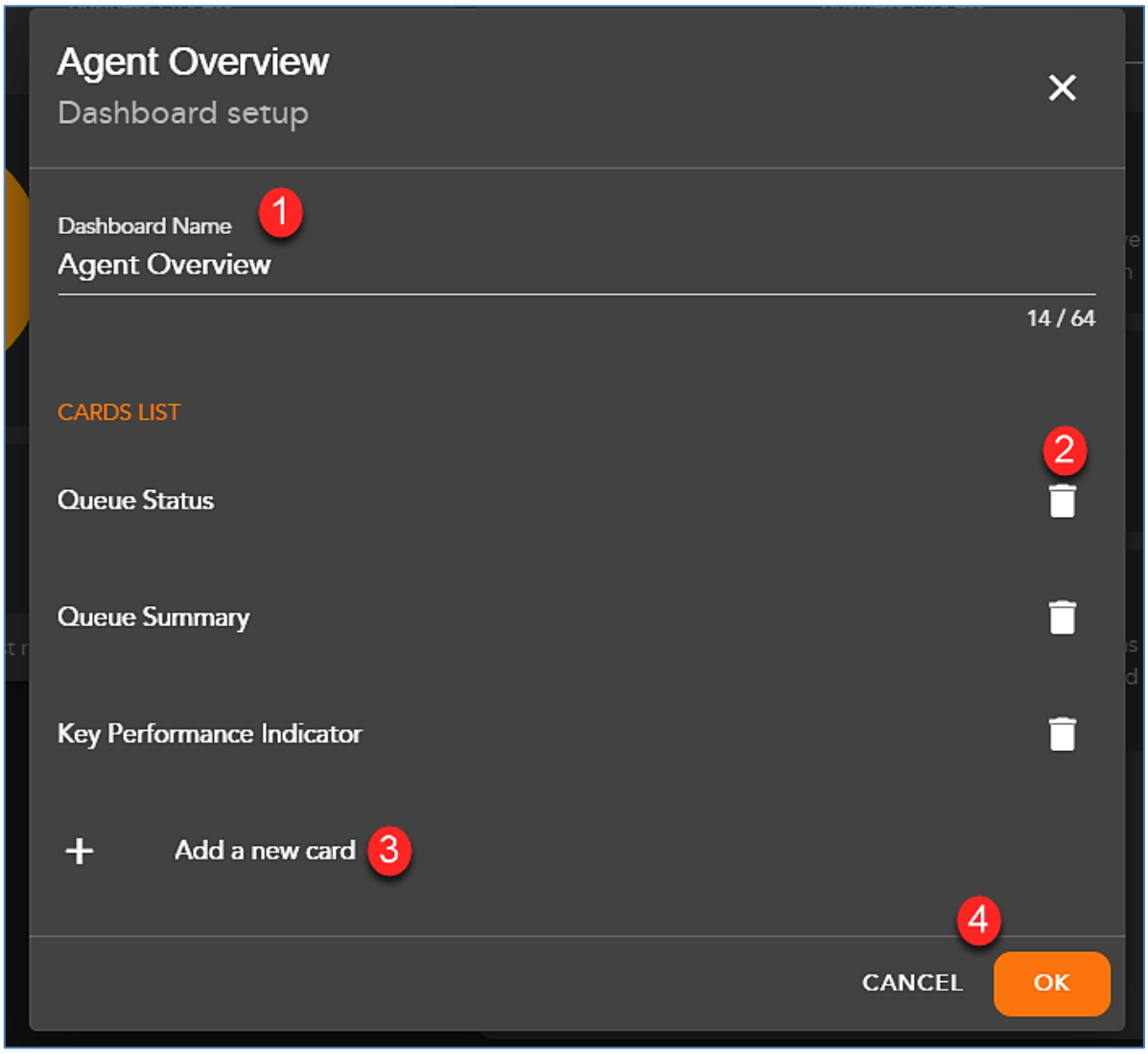
Editing the Agent Overview

To edit the Agent Overview, select menu options and Edit in the AIC Dashboard Panel or select the Dashboard setup floating action button.





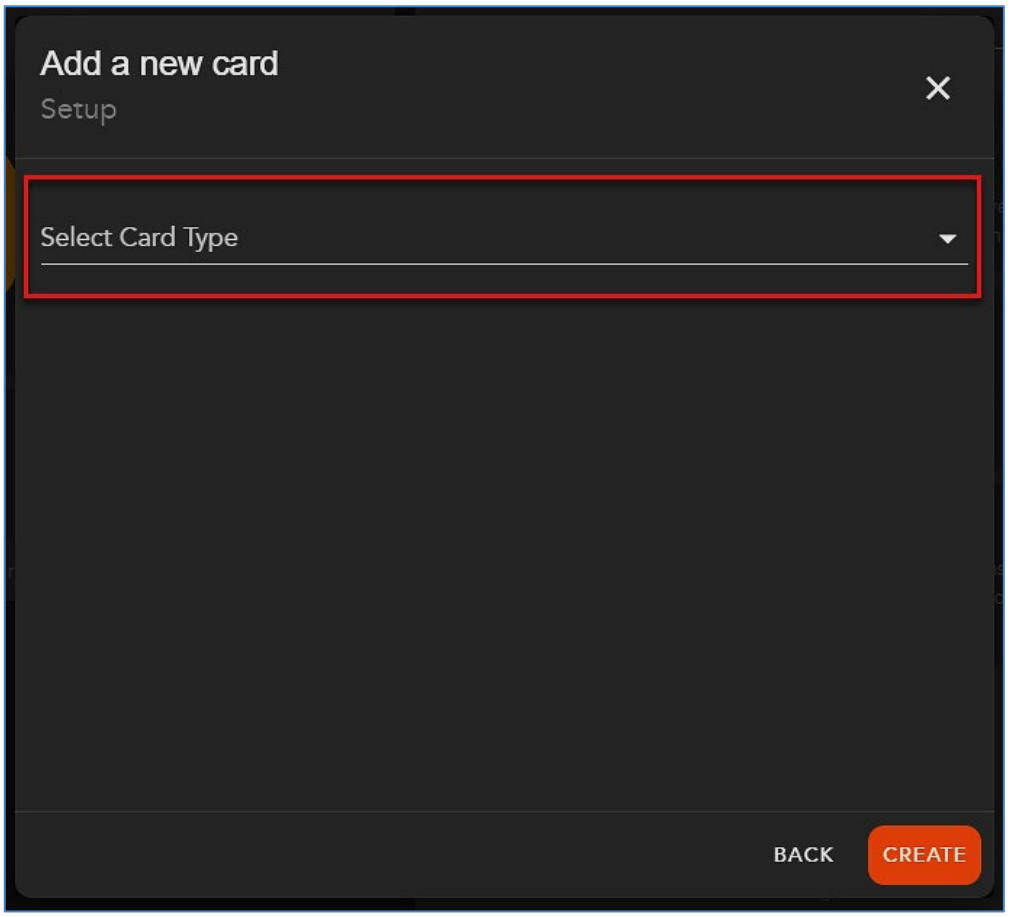
The edit Dashboard window will open with the following options:



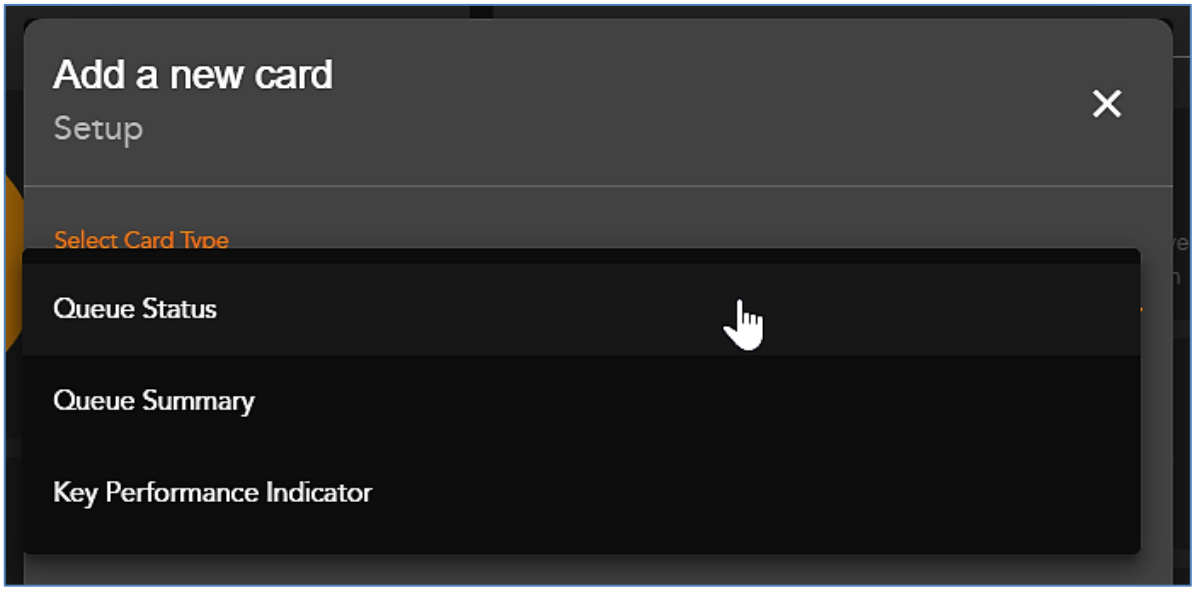
1. **Edit or Rename the Dashboard** - provides the ability to change the current dashboard name
2. **Delete a Card** - this will remove a current card from the dashboard view
3. **Add a New Card** - add a new queue status or summary card
4. **Cancel or OK** - closes the window

Add a New Card

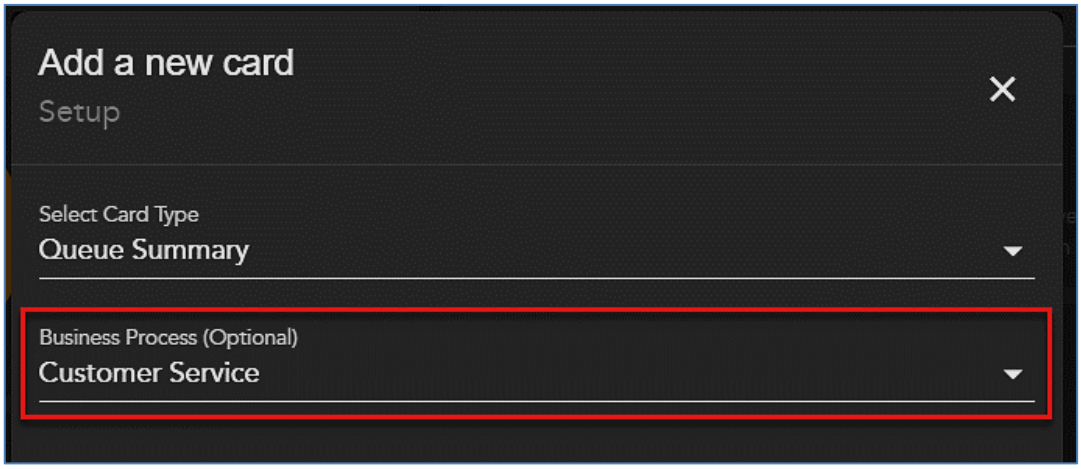
Within the edit dashboard window, you have the ability to **add a new card**. When selecting this option, the edit Dashboard window will update to allow for adding a new card.



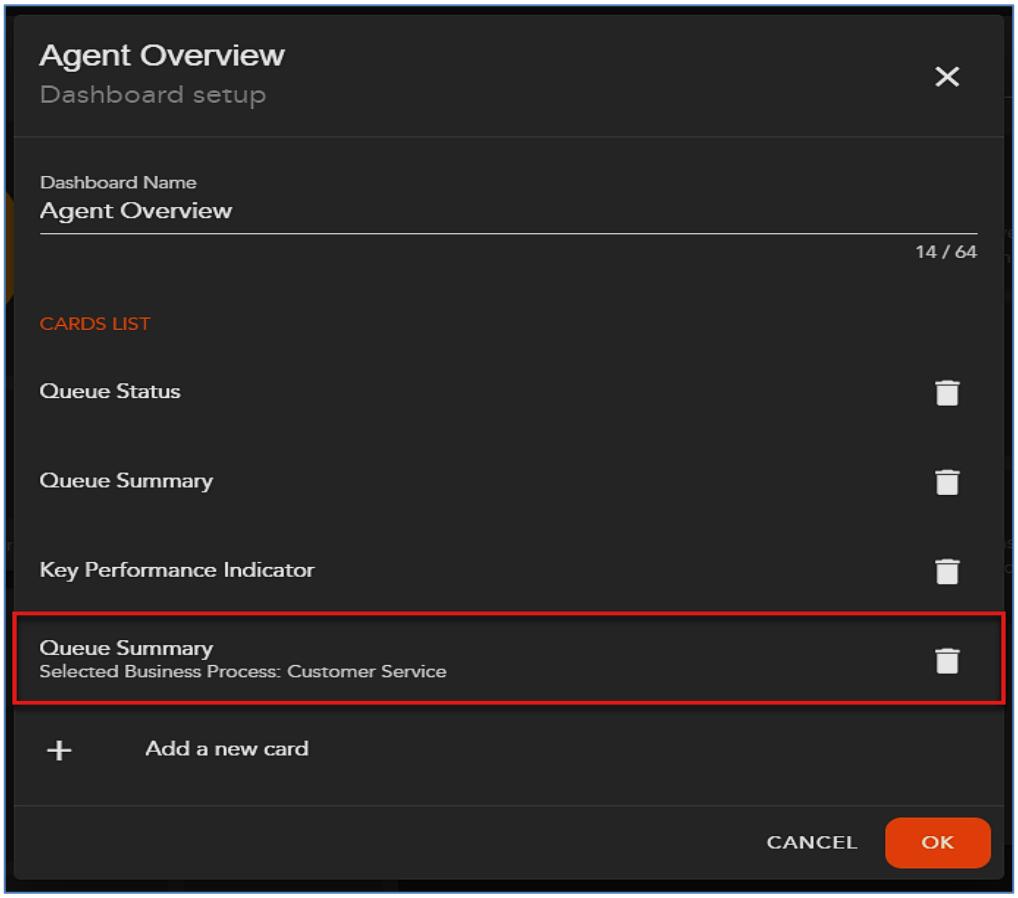
From the *Select Card Type* drop down select to add a Queue Summary, Queue Status Card or Key Performance Indicator (KPI) Card.



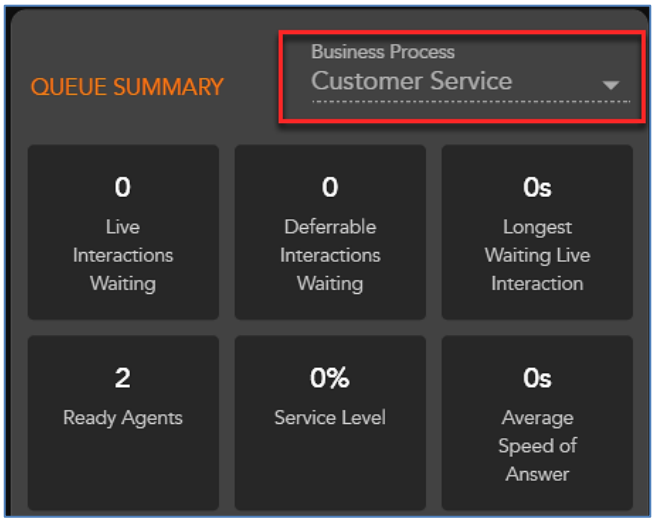
When selecting to add a Queue Summary or Queue Status card, you have the option to select which Business Process stats to show within the new card.



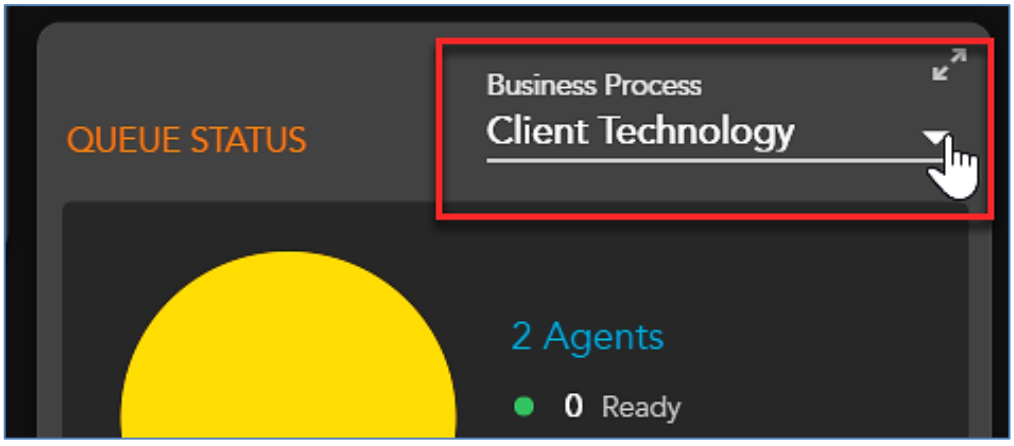
Select **[Create]** to add the card to your Dashboard view. Once created the Dashboard edit window will update to show your newly created card. The new card will show the selected Business Process if added on card creation.



Note: When a card is created to show a specific Business Process, you will be unable to adjust the Business Process chosen in the main Dashboard view. The Business Process drop down will be grayed out.

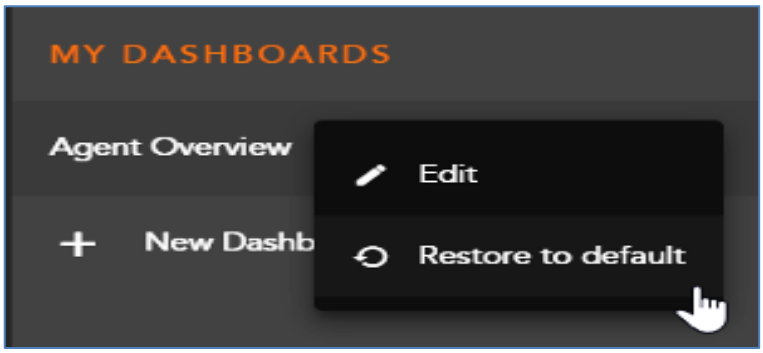


If a new card is added with no Business Process selected on creation, the Business Process drop down will not be grayed out, allowing you to switch between which Business Process to show in the main Dashboard view.



Restore to Default

After making changes to the default *Agent Overview* Dashboard view, you can choose to restore the view to its original format. The original format would include its original title (Agent Overview) and just one Queue Status, Queue Summary and Key Performance Indicator (KPI) card. To restore to the default view, select menu options in the dashboard panel next to the dashboard and select Restore to Default.



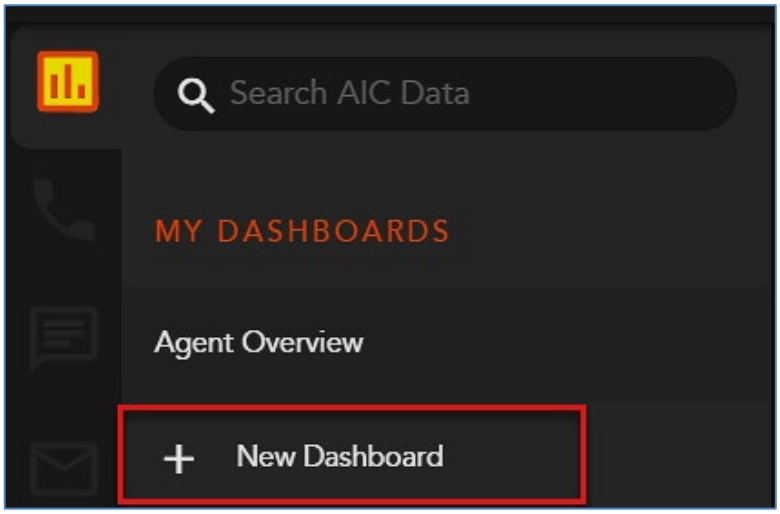
The Restore to Default will only be available if you only have one dashboard created in the AIC Panel.

Add a New Dashboard

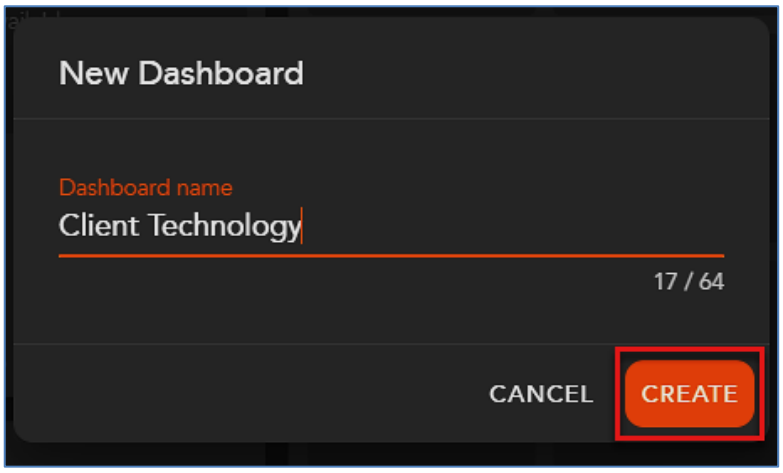
Adding a New Dashboard

The AIC allows for agents to have multiple Dashboards. This provides agents the ability to customize different dashboard views and the cards within those views. Agents can have multiple dashboards and easily navigate between the views.

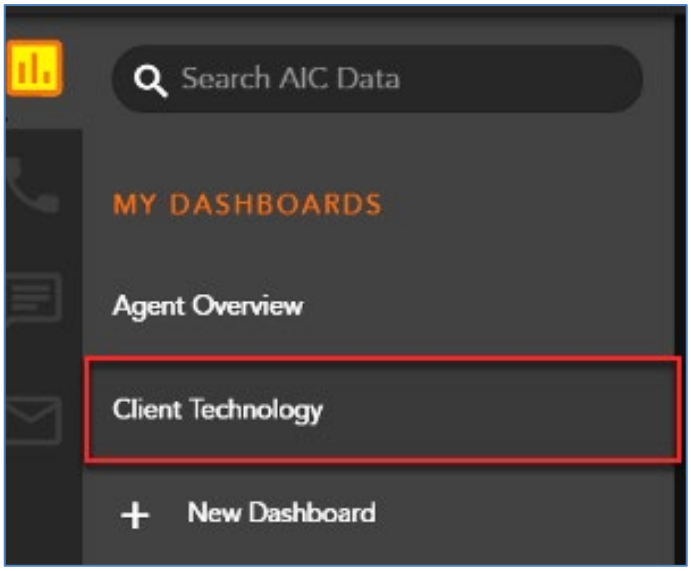
To add a new dashboard, select *New Dashboard* within the AIC Panel.



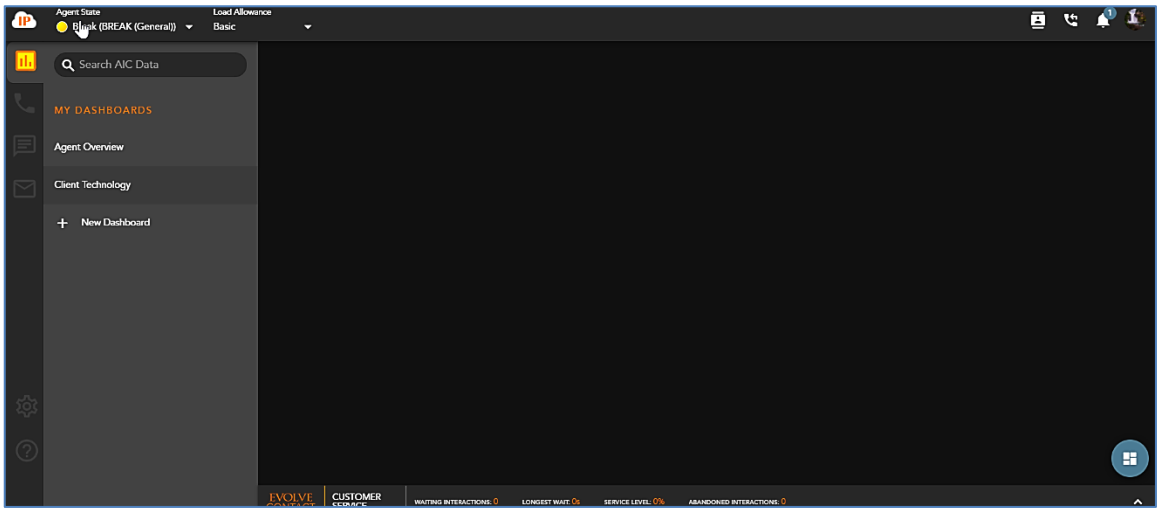
A New Dashboard window will open. Enter the name of the new Dashboard; select *Create*.



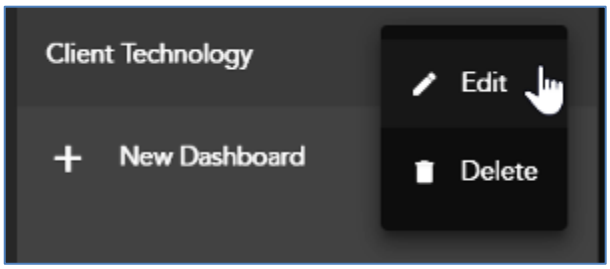
Once created, the new Dashboard will appear in the AIC Panel.



When you click on the dashboard, the dashboard view will be blank.

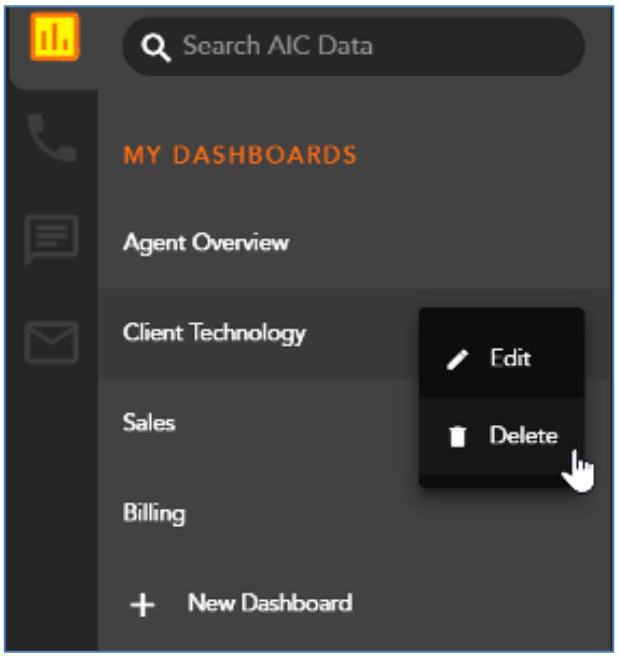


Click on either the menu options > **edit** or the Dashboard setup floating action button to begin adding new cards to the new Dashboard view. *See Adding a New Card* section to learn how to add new cards to your Dashboard view,

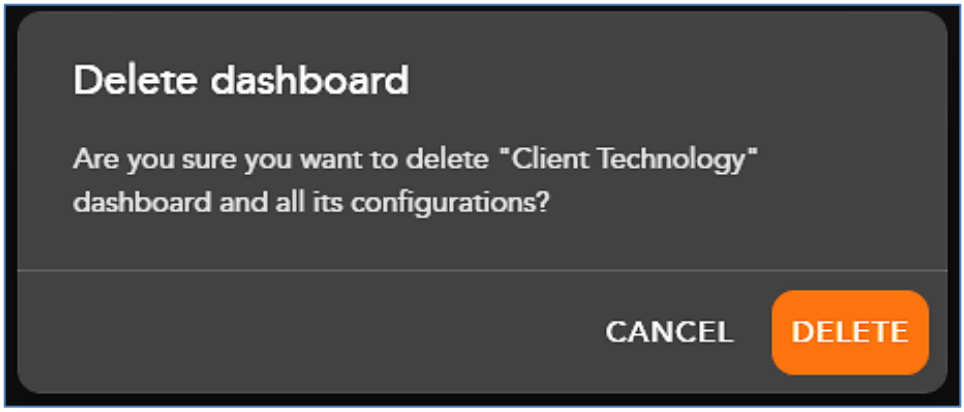


Deleting a Dashboard

A Dashboard can be deleted if there are more than one Dashboard views in the AIC Panel. To delete a Dashboard view, select menu options > **Delete**

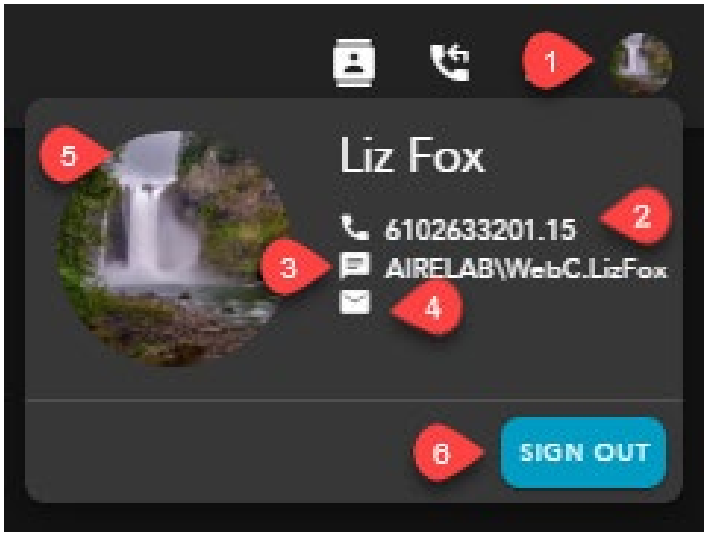


A confirmation pop up will ask you to confirm you want to delete the dashboard. Select *Cancel* to cancel the deletion of the dashboard or *Delete* to confirm you wish to delete the dashboard.



Agent Profile

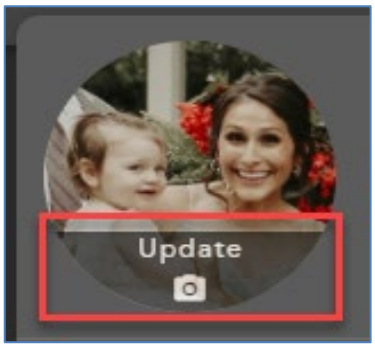
Overview



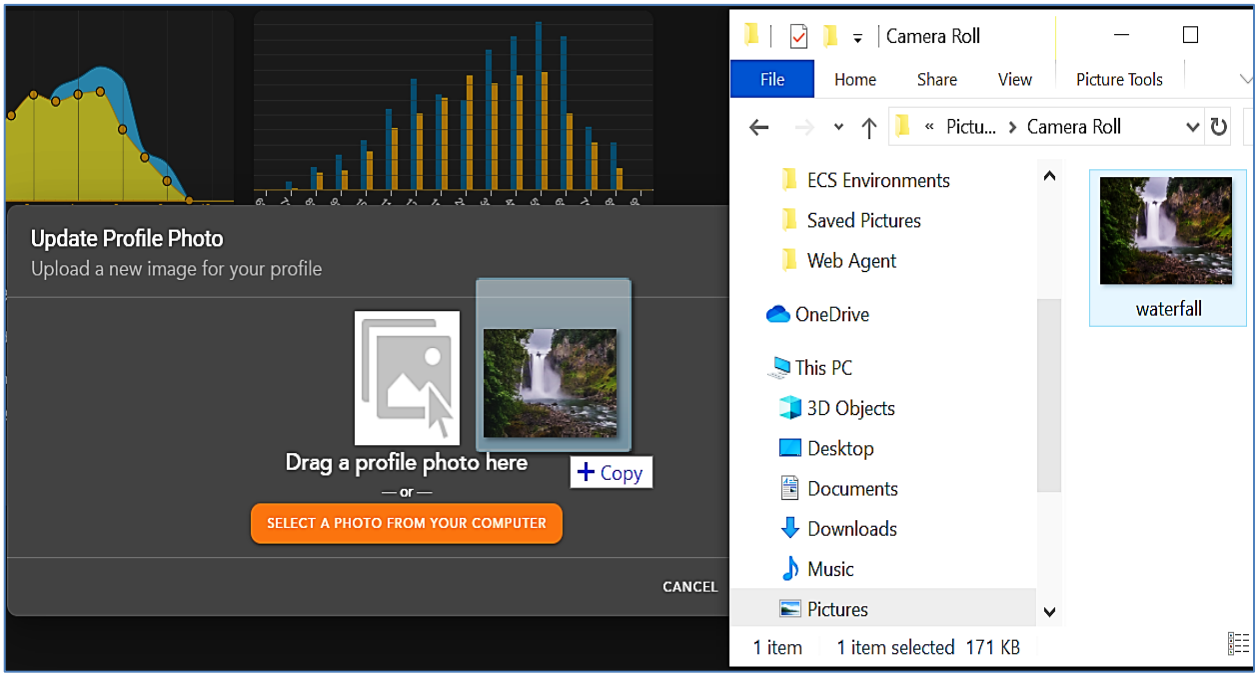
1. Agent Profile Icon - access to agent information, avatar upload and Sign Out
2. Agent End Point - agents end point - HPBX Phone or Private Phone. HPBX phone would be a physical handset or soft phone client like UC One. Private Phone would indicate that you are currently forwarding all numbers to a private phone, i.e cellphone
3. Agent Username
4. Email - agent email address if added to the Setup client
5. Agent Avatar - provides the ability to upload a unique image or logo for the agent's avatar. If no image is uploaded it will display the agents initials or name
    a. Supported image file types - *.jpg *.gif *.bmp *.png *.svg.
    b. Supported file size - up to 1024 Kb
6. Sign Out - sign out of the application

Adding an Agent Avatar

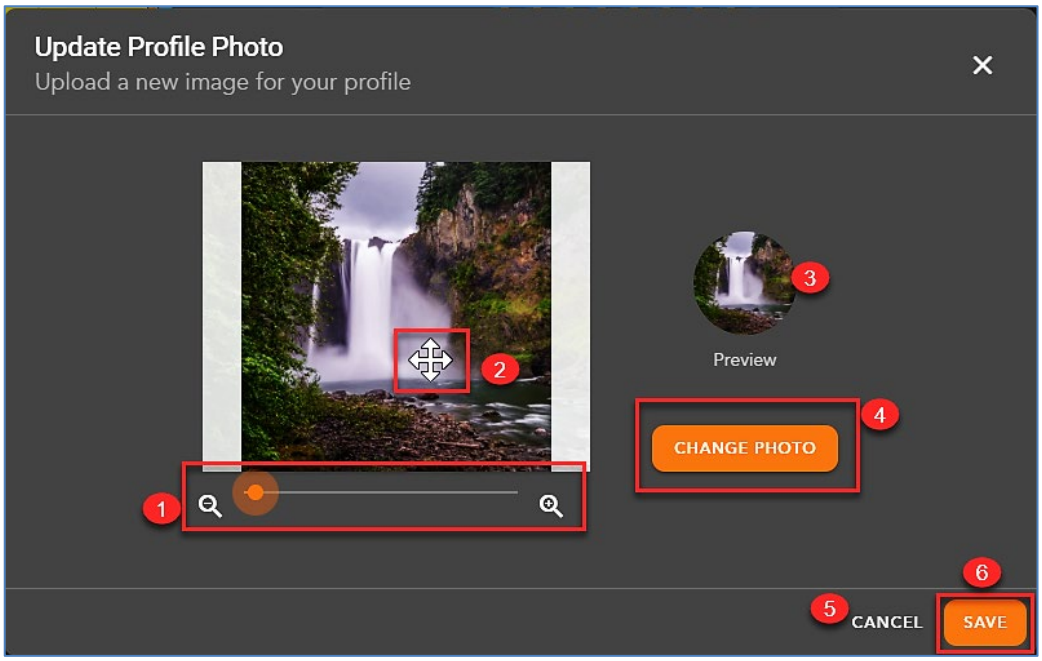
Hover our the agent avatar and select update,



The Update Profile Picture window will open. You can drag a photo into the window, or search to add a picture from your computer.

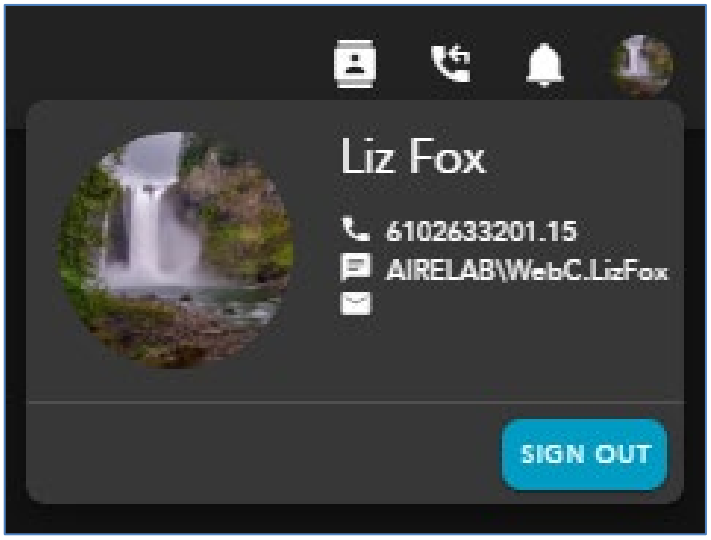


Once a photo has been selected, you can update your photo.



1. Minimize or maximize the photo
2. Drag the photo for desired placement
3. Preview of agent avatar and profile picture
4. Change the photo to a different photo
5. Cancel changes to keep current avatar photo
6. Save changes to update avatar photo

Saved changes will update Agent Profile picture and Avatar.

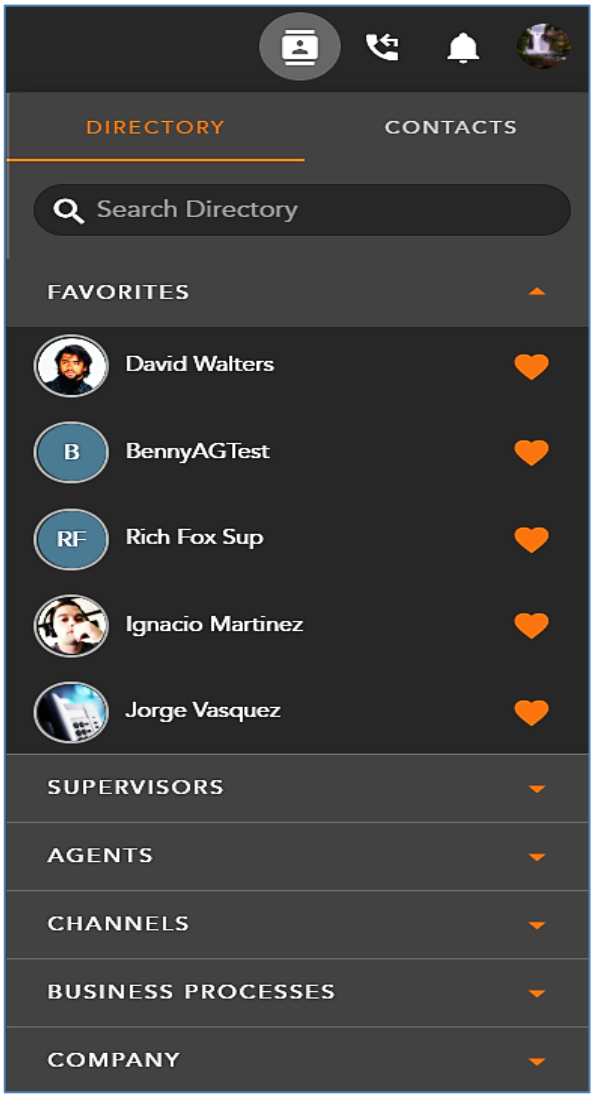


Contacts

Using Contacts

The Contacts tab consists of your organization's contact center contacts including Agents, Supervisors, Business Processes and Channels, as well as non contact center contacts including the Company directory, CRM Contacts and External Address Book. Setup a favorites list to easily access contacts you communicate with on a regular basis to help initiate quick interactions with your contacts and organizations end users.

1. **Directory** - consists of your directory Favorites, Agents, Channels, Business Processes and Company Directory
2. **Contacts** - consists of your External Favorites Contact List, CRM Contacts and External Address Book

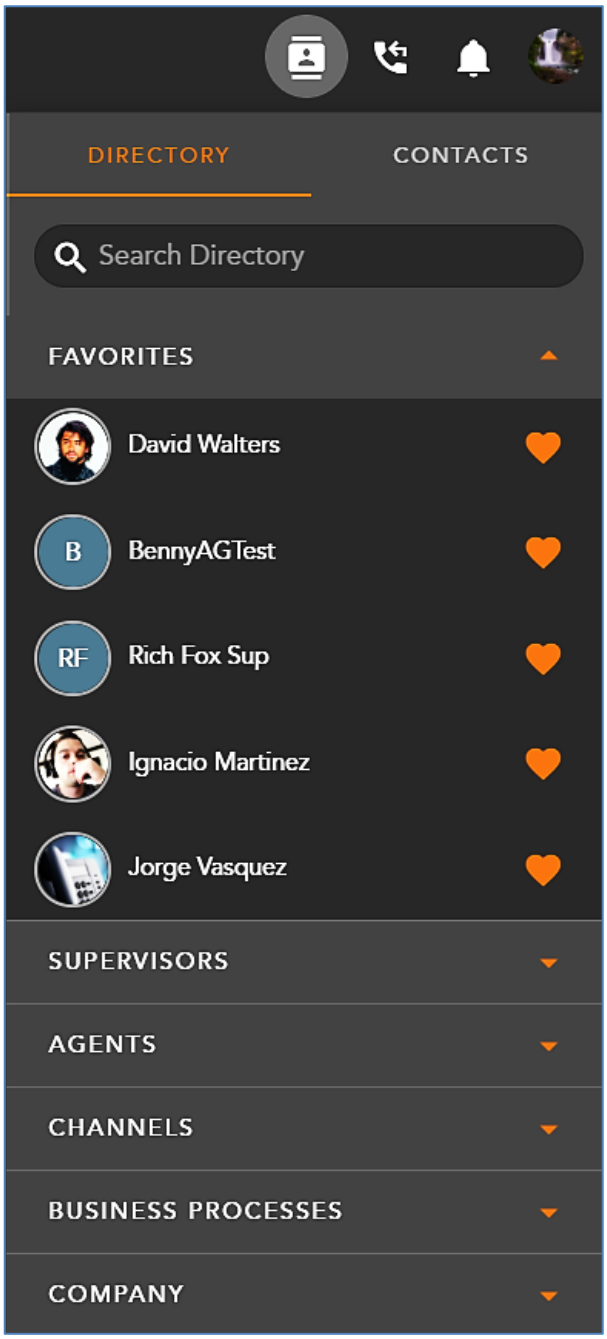


Directory Tab

Upon first signing in and accessing the contacts tab, your default view will open to your Directory favorites.

The Directory Tab consists of the following:

1. **Favorites** - contacts added from the Supervisor, Agent, Channel, Business Process and Company directories. You can have up to a total of 30 favorites within the Directory view. Your favorites list will be available when performing transfers or conferencing on queued interaction.
2. **Supervisors** - All Supervisors within the Contact Center. Supervisors that have been added as a favorite will appear at the top of the list, followed by the rest of the Supervisors in alphabetical order.
3. **Agents** - All Agents within the Contact Center. Agents that have been added as a favorite will appear at the top of the list, followed by the rest of the Agents in alphabetical order.
4. **Channels** - All Channels within the Contact Center. Channels that have been added as a favorite will appear at the top of the list, followed by the rest of the Channels in alphabetical order.
5. **Business Processes** - All Business Processes within the Contact Center. Business Processes that have been added as a favorite will appear at the top of the list, followed by the rest of the Business Processes in alphabetical order.
6. **Company** - All end users (including agents and supervisors), Hunt Groups, and Auto Attendants within the Company. This directory will comprise of end users HPBX ten digits DID or extension. This will also provide the end users availability by displaying the on hook/off hook state.



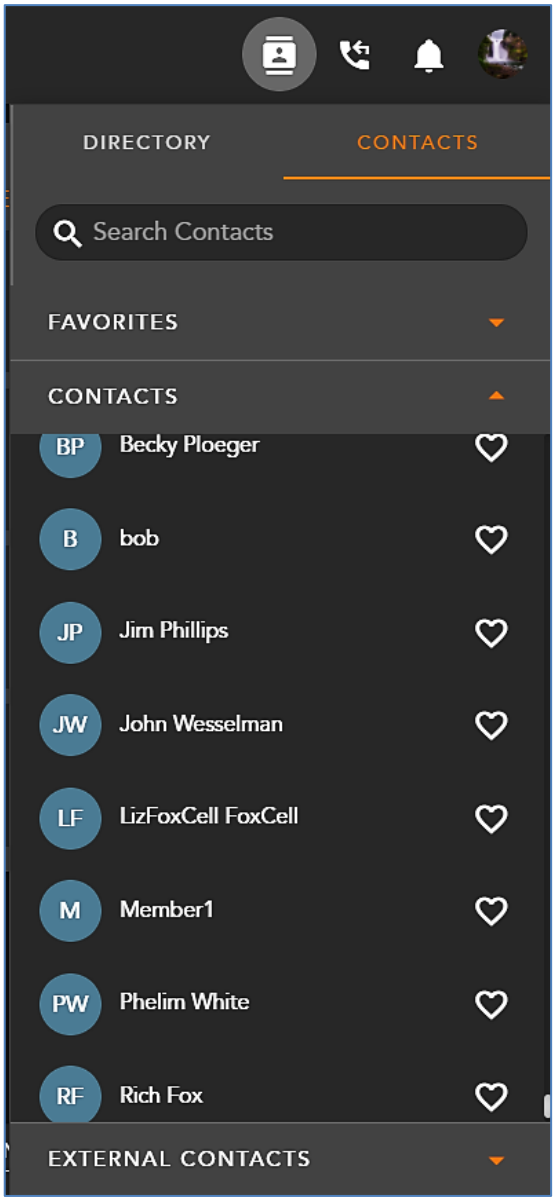
Contacts Tab

The Contacts Tab consists of the following:

1. **Favorites** - contacts selected from the Contacts and External Address Book directories. You can have up to a total of 30 favorites within the Contacts view.
2. **Contacts** - contains the list of contacts that can be found within the Contact Management system. These contacts are typically added by the Supervisor or System

Administrator through the Supervisor Client. Contacts that have been added as a favorite will appear at the top of the list contact list, followed by the rest of the contacts in alphabetical order,

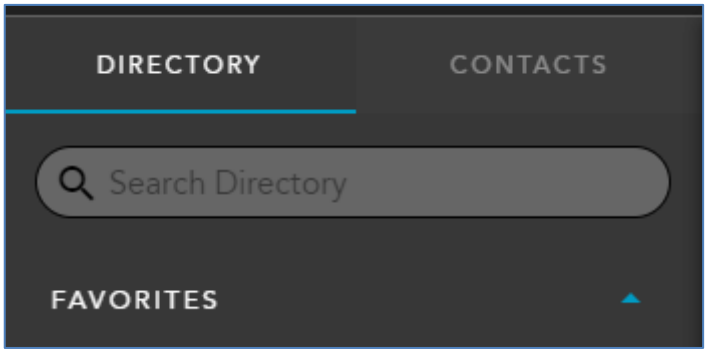
3. **External Contacts** - contains a list of contacts outside of the organization that is managed within the Setup Client. Contacts that have been added as a favorite will appear at the top of the list, followed by the rest of the contacts in alphabetical order.



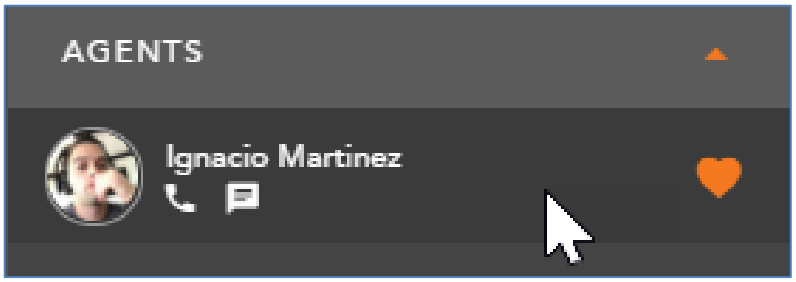
Searching for a Contact

You can search for a contact based on the following criteria: DID, HPBX Extension, Contact Center Extension, First and Last Name and Email Address.

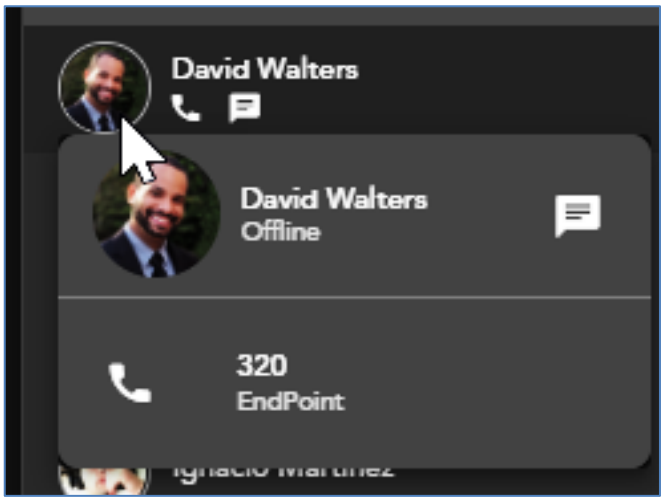
1. Enter in your search criteria within the Search Directory Bar. Search criteria include the contact's name, email, phone number or phone extension.



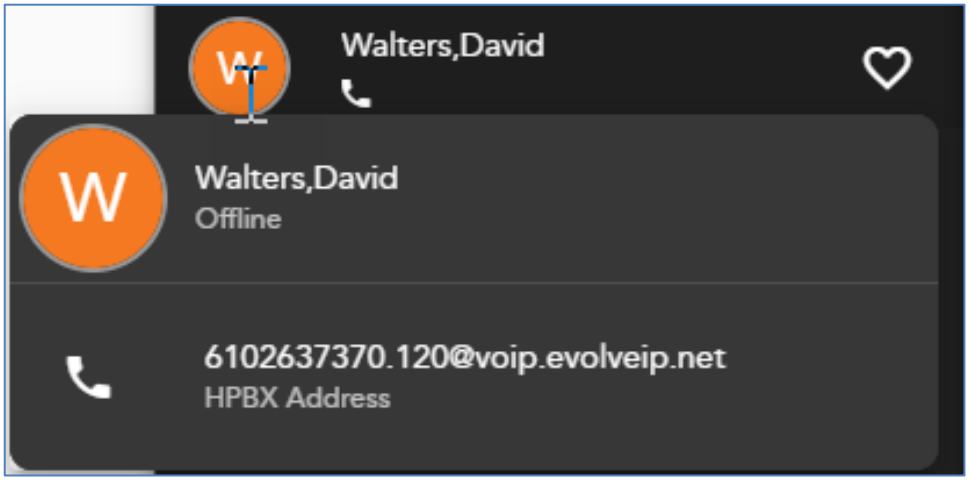
2. As you begin typing, the directory will filter out directory lists that do not match your search criteria.
3. When you've finished your search there are two ways you can initiate an interaction with a contact:
    a. Hover directly over the contacts name to show which communication options are available. If searching for an Agent or Supervisor email may or may not be available depending on their profile settings within the Setup client. Clicking on one of the available icons (Telephony), (Chat), or (Email) will initiate the interaction with the contact.



    b. Hover over the contacts image or avatar to get more detailed information about the contacts Extension/DID and email address. Initiate an interaction from by clicking on the appropriate icon.
    c. This first example shows the contact information of an Agent. The extension shown is specific to the contact center and can only be dialed between agents and supervisors.



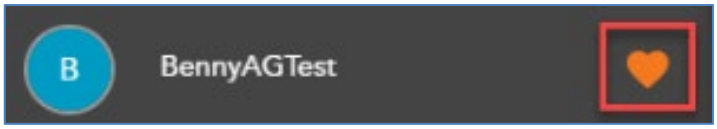
d. This second example shows a contact from the Company directory and is specific to the end users HPBX extension. If no image was upload for the contact, the avatar will show the initials of the contact.



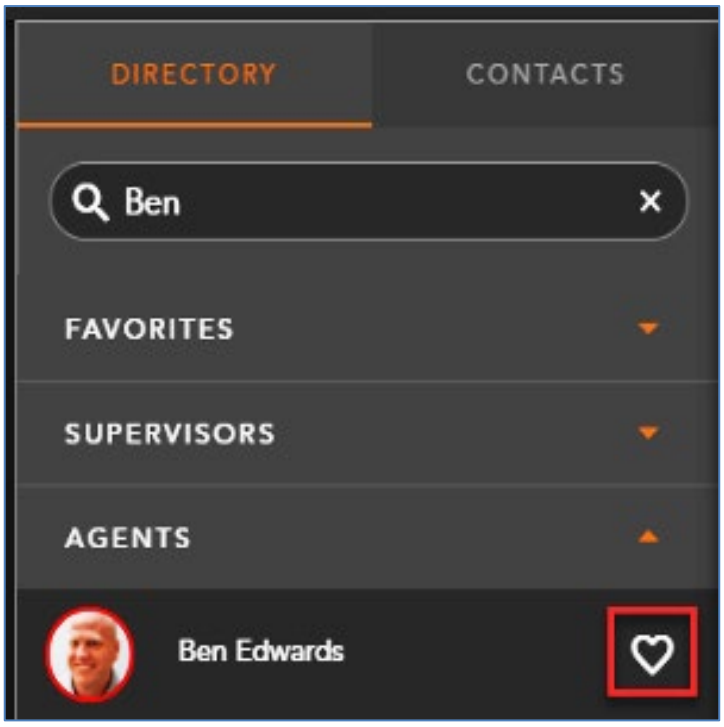
Adding and Removing a Favorite

Search for the user, Business Process, or Channel you wish to add to your favorites list. As you begin to enter your search criteria the Directory tab will filter down to populate only the contacts that match your search criteria.

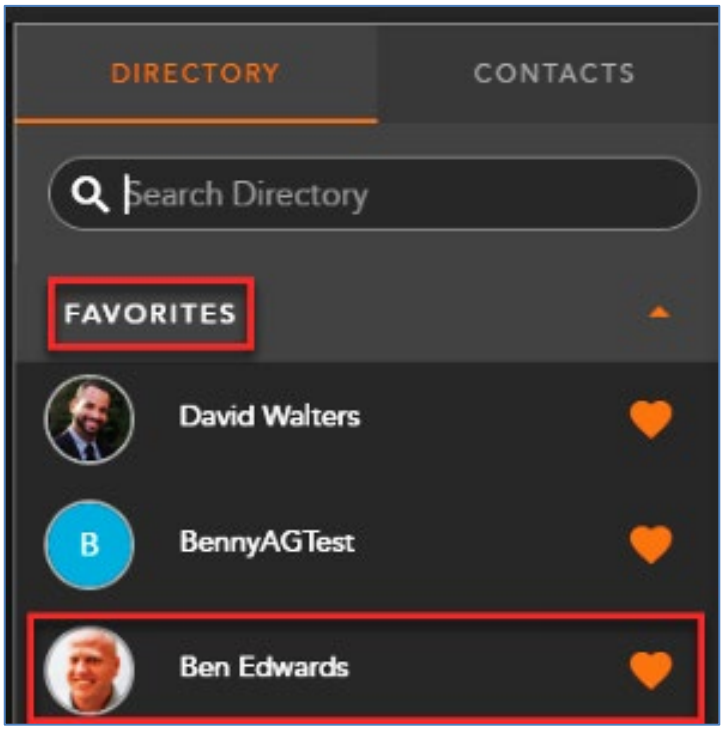
If you have already added the contact to your favorites, you will see the favorites icon highlighted next to their name.



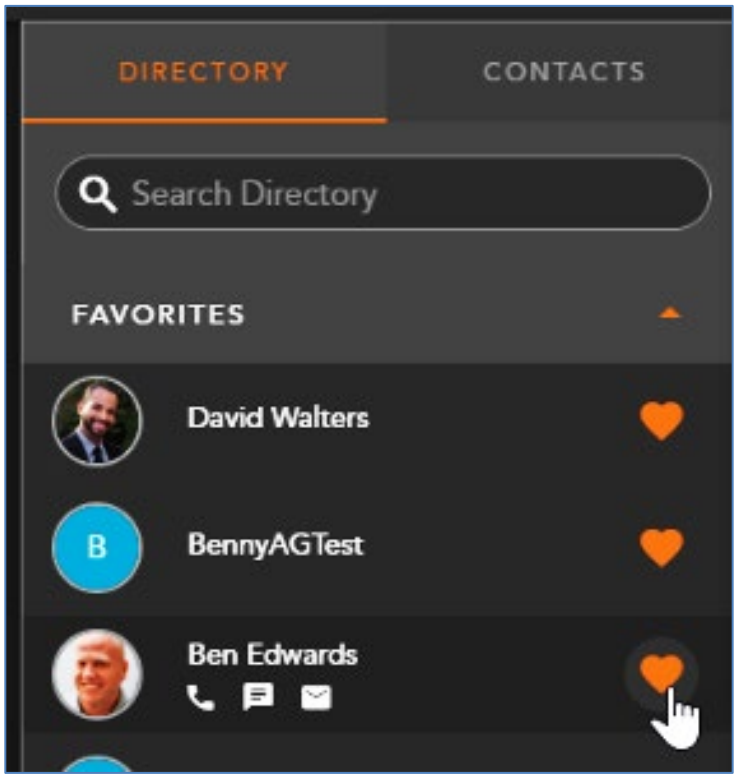
If the contact have not been added, the favorites icon will not appear highlighted.

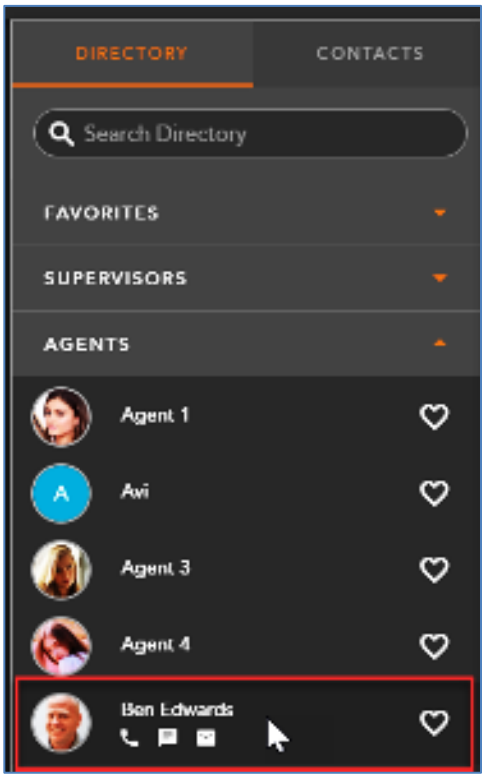


Select the *Favorites* icon to add the user to your favorites list.



To remove a contact from your favorites, click on the highlighted icon next to the contact to remove them from the list.

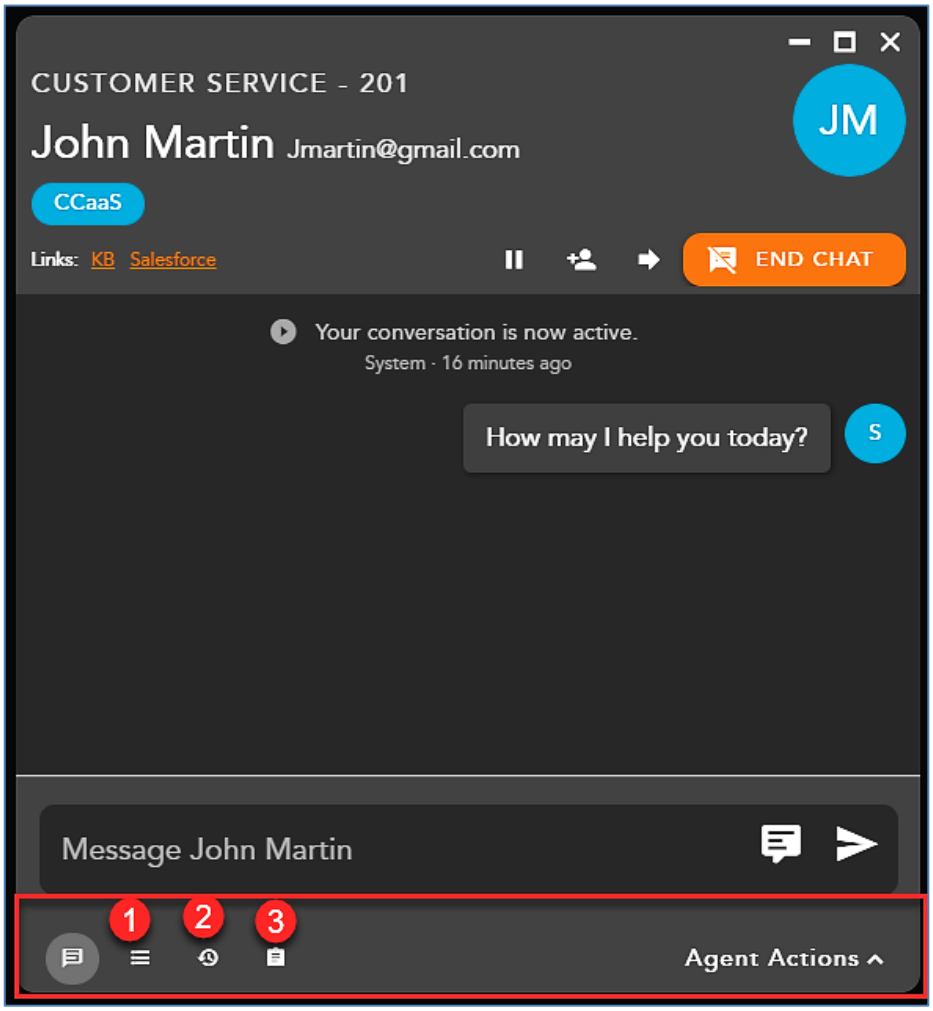




CRM Panel

Overview

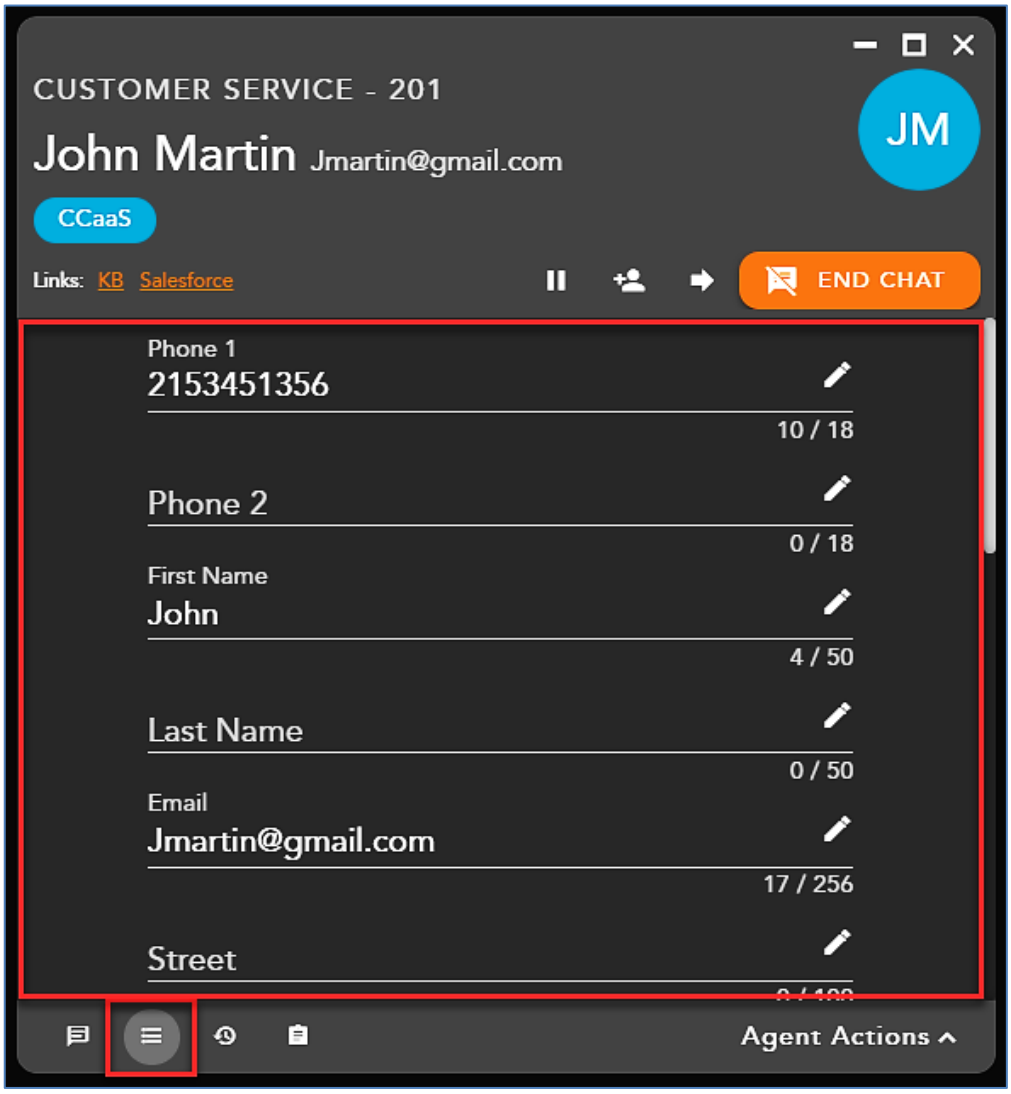
The CRM panel is available on active or historical interactions and provides agents access to the contacts information, historical interactions and notes and remarks from past interactions. The CRM panel is only available to agents when enabled on the agents profile found in the Setup Client.

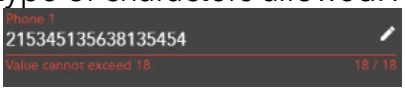


CRM options are available in the Interactions Footer

1. **Contacts** - displays the saved contact information. The available fields are pre-configured through a CRM template in the Setup Client.
2. **History** - displays the contacts historical interactions
3. **Notes and Remarks** - notes and remarks made by agents or through the Interaction Handling Flow about the contact

Contacts

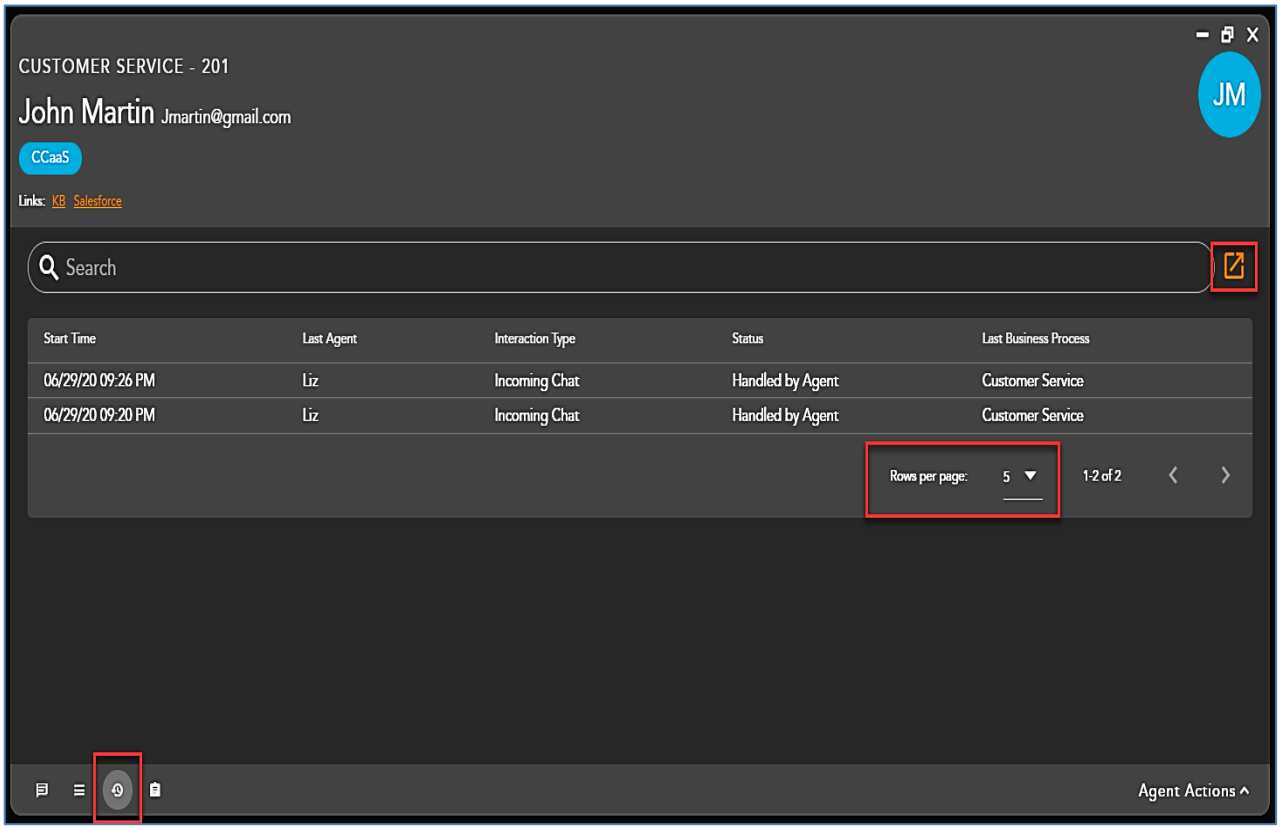


Contacts will display all available contact information. The fields that are viewable and editable to an agent are determined by an Administrator in the Setup Client. Each field has validation on the limit and type of characters allowed. A *validation error* will be shown if the character limit is reached 

or an *invalid character* is entered

The input must be corrected for the contact information to save.

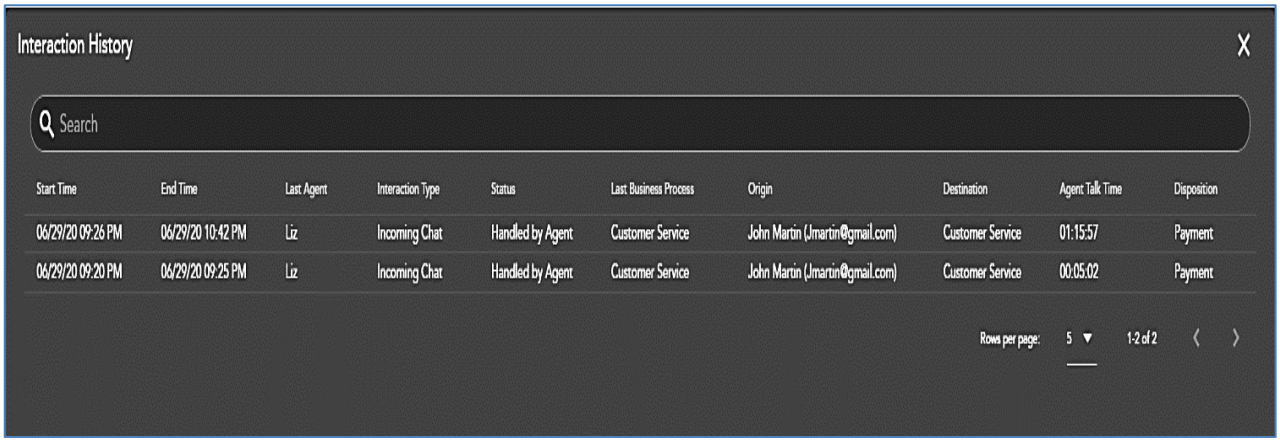
History



History displays the contacts historical interactions. The default view displays the five most recent historical interactions. To display more interactions, select the desired value (5,10, 15 or All Interactions) from the Rows per page drop-down. The minimized historical interaction view shows the following information:

1. **Start Time:** Start time of the interaction
2. **Last Agent:** Last agent that handled the interaction
3. **Interaction Type:** Interaction Type of the historical interaction (chat, telephony, or email)
4. **Status:** Interaction Status
5. **Last Business Process:** Business Process the interaction was handled

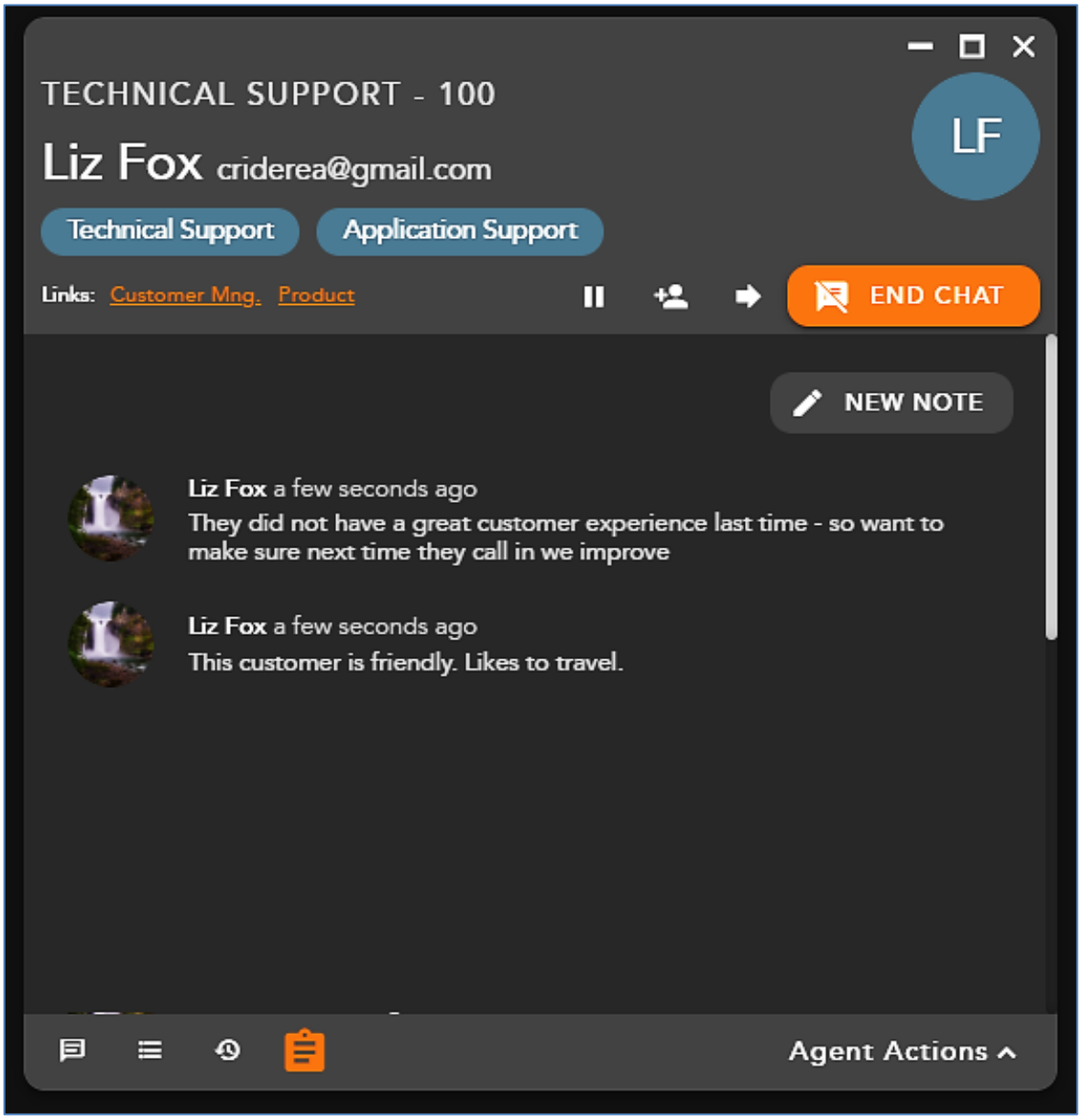
To expand the historical view and see more details about the interactions select the pop out window icon.



The expanded historical interaction view shows the following information:

1. **Start Time:** Start time of the interaction
2. **End Time:** End time of the interaction
3. **Last Agent:** Last agent that handled the interaction
4. **Interaction Type:** Interaction Type of the historical interaction (chat, telephony, or email)
5. **Status:** Interaction Status
6. **Last Business Process:** Business Process the interaction was handled
7. **Origin:** Contacts Name and Origin of the interaction
8. **Destination:** Original Business Process destination of the interaction
9. Agent Talk Time
10. **Disposition:** Final Disposition Code given to the interaction

Notes

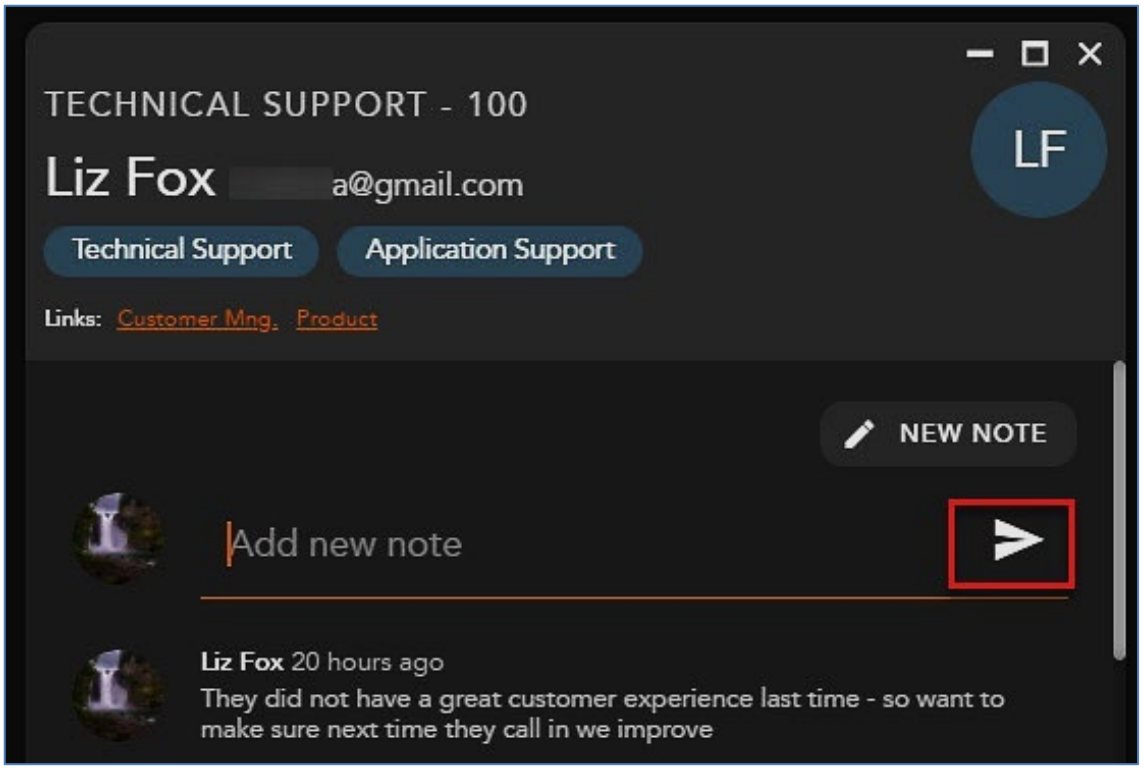


Notes are unique and specific remarks about the contact added by agents.

Note history shows:

1. Agent that added the remark
2. Day the remark was added
3. Remark

To add a new note select **[New Note]**. The Add New Note section will open to allow you to enter in a new note. Once you have entered in a note select the add icon to save the note to the contact.

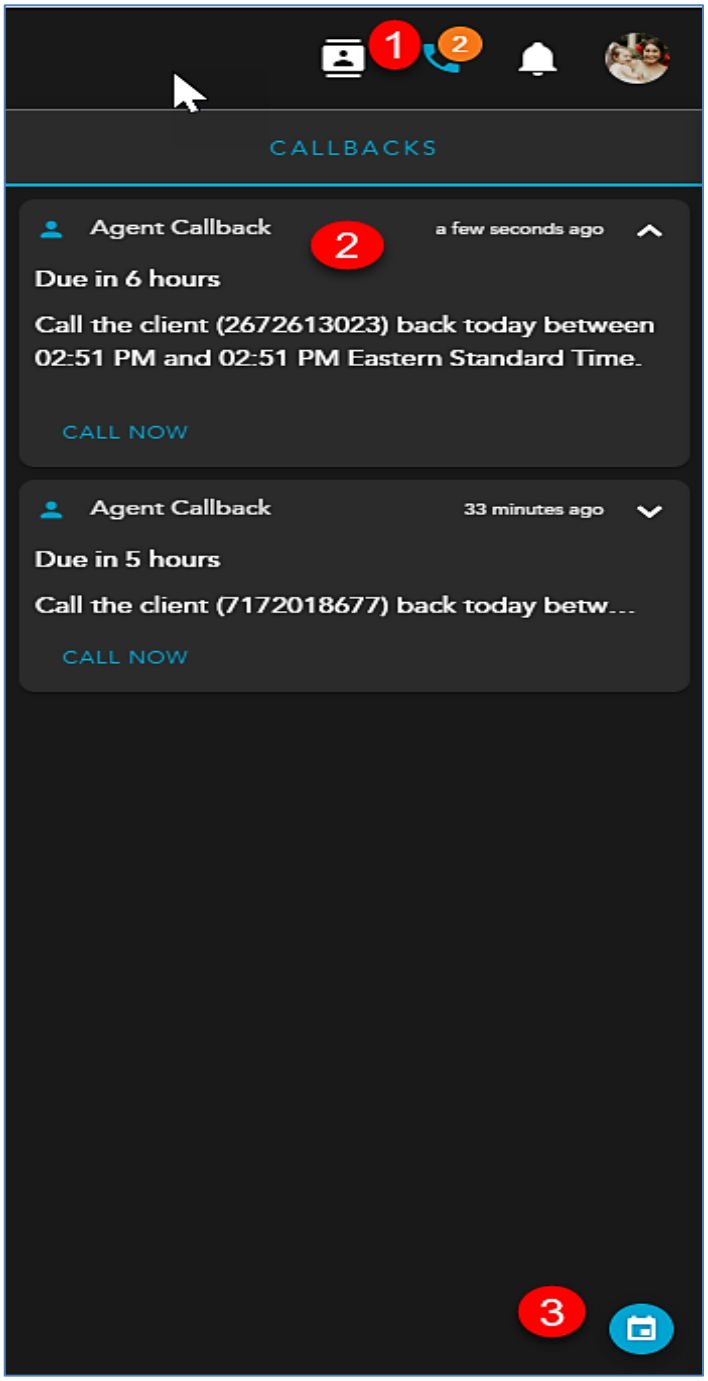


Handling Callback Interactions

Overview

Agents have the ability to assign a callback (if the feature is enabled for the agent profile) through the callback pop up on an active interaction or within the Call History Panel after wrapping up a telephony interaction. Agents will also have the ability to generate a brand new callback, not tied to a specific telephony interaction within the Callback Panel itself. This allows the agent flexibility and time to schedule a customer callback that isn't tied to a specific wrap up time frame or additional work needed to be completed in between interactions.

Interacting with the Callback Panel



1. **Callback Panel Icon** - Indicates how many callbacks you have pending. Click on the icon to expand the Callback Panel for more details on your pending callbacks. Click on the icon to close the Callback Panel.
2. **Pending Callback Panel** - Shows all Pending Callbacks. Will display the following information:
    a. Due Date/Time of the Pending Callback

b. Client DID

c. Time period the callback should be completed

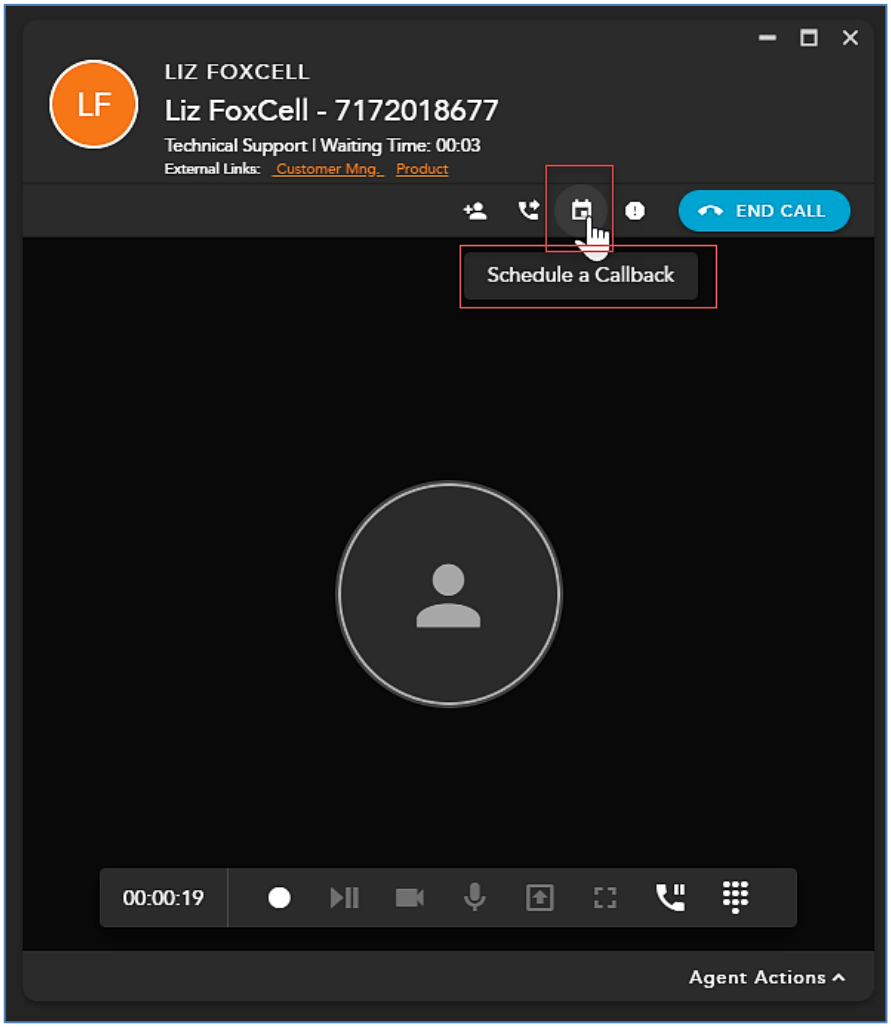
d. Call Now - Provides the ability to manually call the contact without needing to wait for the interaction to be presented to you

3. **Schedule** - Click on the Schedule icon to schedule a new callback that is not associated with an active or historical call interaction

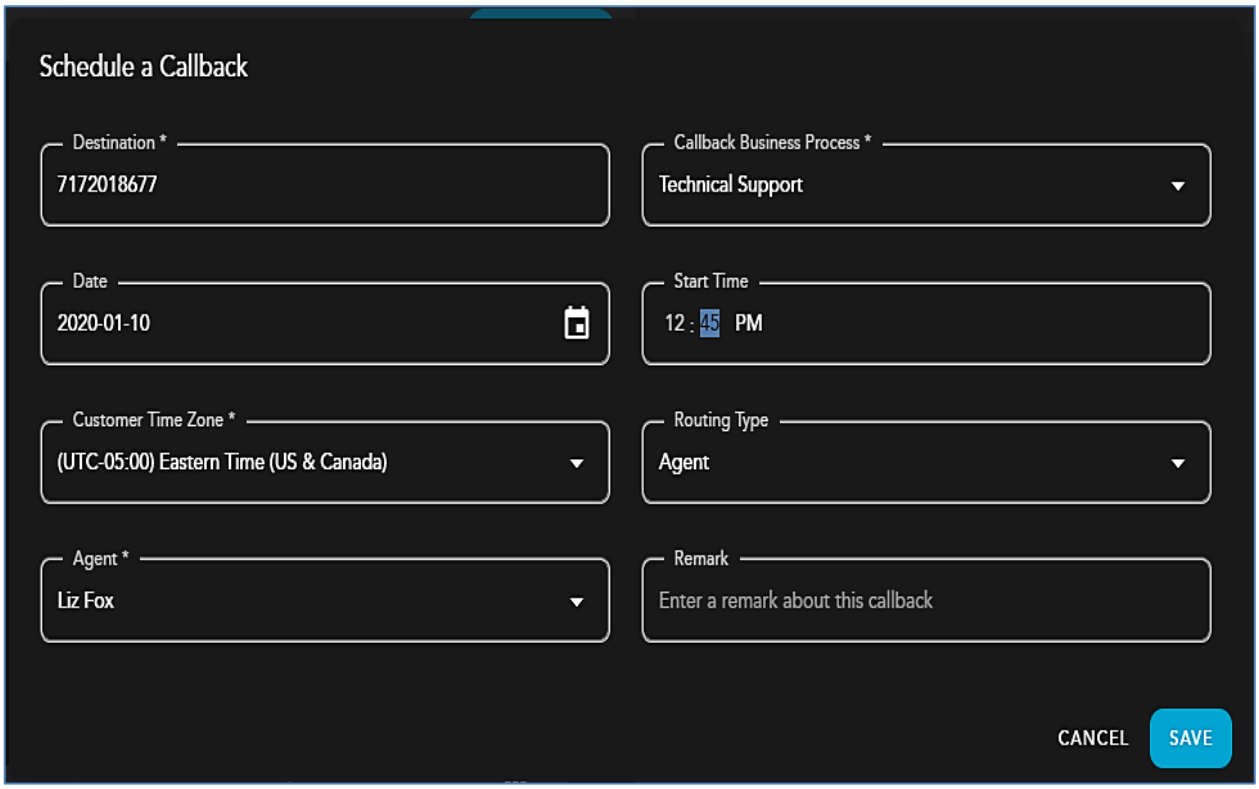
Assigning Callbacks

Active Interaction

1. When on an active call interaction, select the **Schedule Callback** Icon within the interaction toolbar.



2. The *Schedule a Callback* window will open. Edit or update the information that is pre-populated to process the callback:



a. **Destination** - pre-populated DID of the contacts telephone number

b. **Callback Business Process** - pre-populated based on originating Business Process. This field can be changed if the callback should be sent to a different Business Process than the interaction originated from.

c. **Date** - pre-populated to current date of interaction but can be adjusted if different callback date is desired

d. **Start Time** - pre-populated but can be adjusted if different callback time is desired

e. **Customer Time Zone** - not pre-populated and is typically the time zone of the contact the callback is intended for

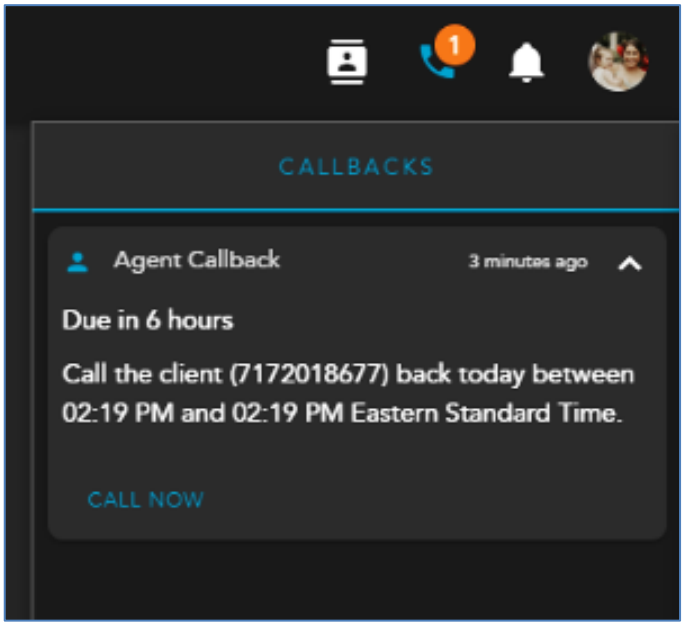
f. **Routing Type** - Routing Type will depend on preconfigured options based on the Callback Business Process. The callback can go to either a specific agent or team of agents.

g. **Agent/Team** - this will auto-update based on the routing type selected. From here, select the team or agent the callback should sent to.

h. **Remark** - optional. The remark will be presented to the agent handling the callback.

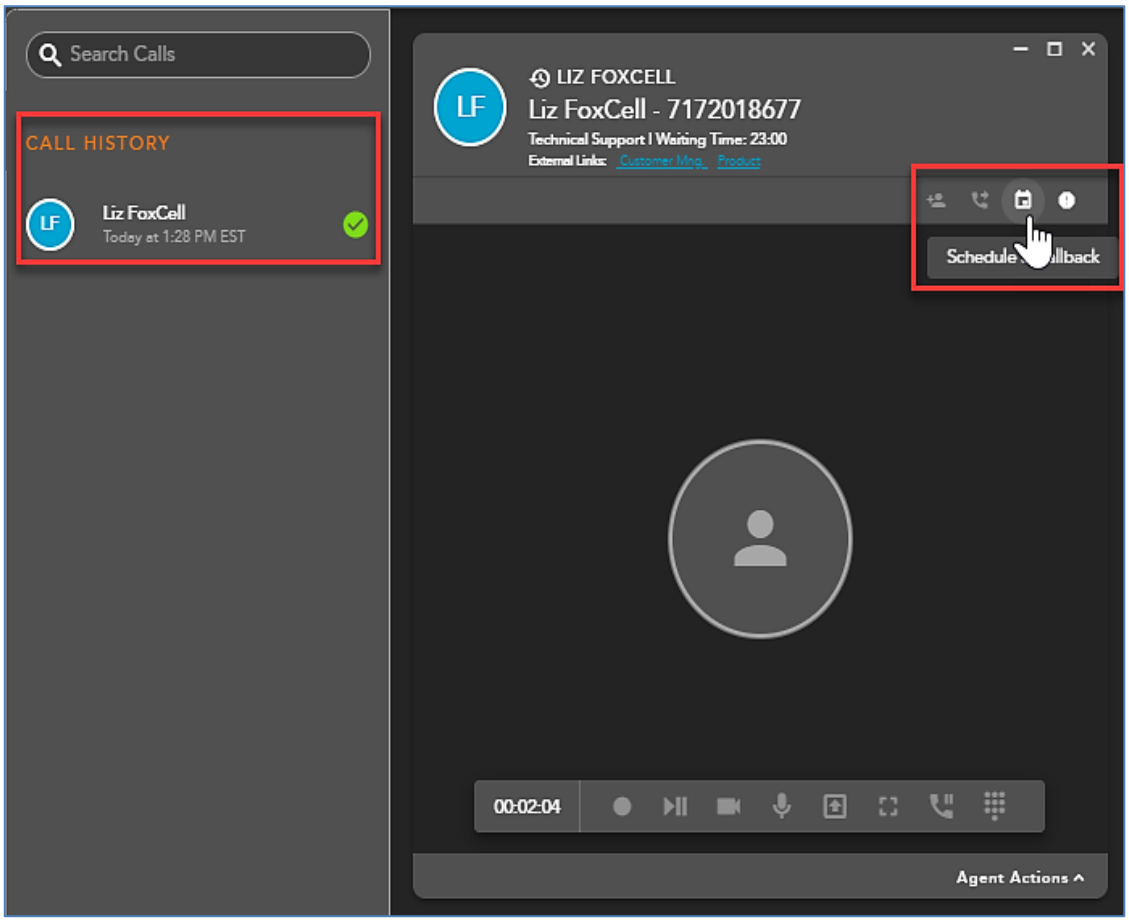
3. Click Save

4. If you assigned the callback to yourself, you would see the **Callback Panel** icon updated which shows that you have one waiting callback interaction. Open the Callback Panel to view the callback details. If the callback was assigned to a team of agents, you will not see the Callback Panel icon update because the callback was not specifically assigned to you.



Historical Interactions

1. To schedule a callback for a historical interaction, double-click on the *historical interaction* under **Call History** within the interaction sidebar to open the interaction in the main window.
2. Click on the Schedule Callback icon.

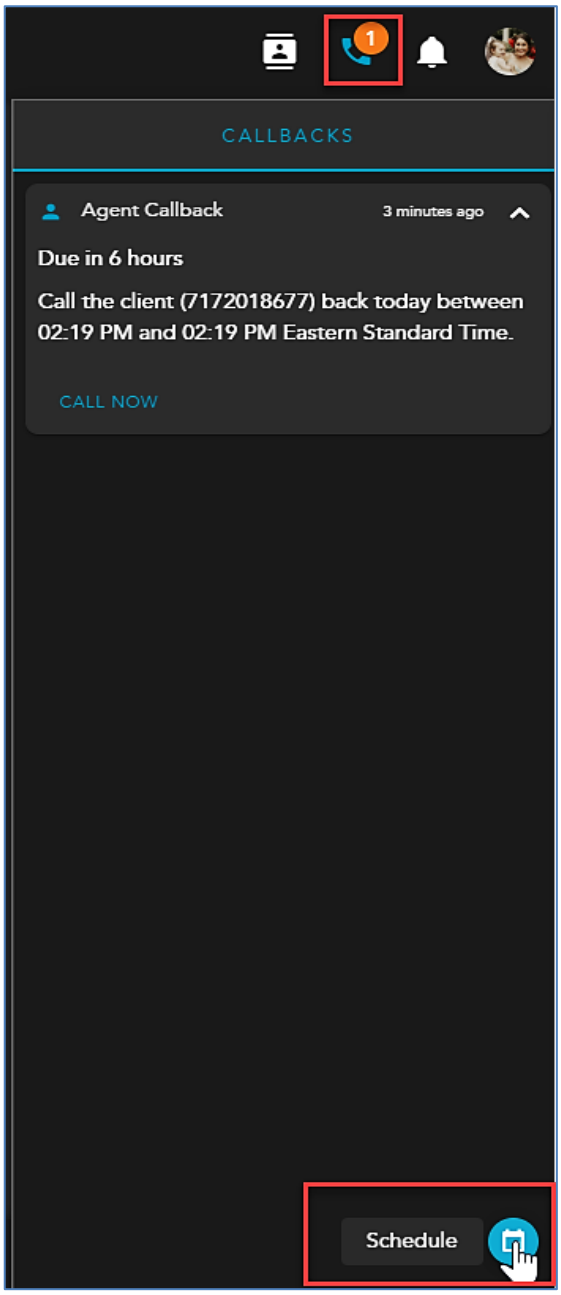


3. The Schedule a Callback window will open. Edit or update the information that is pre-populated based on the contacts information to process the callback:

4. **Destination** - pre-populated DID of the contacts telephone number
5. **Callback Business Process** - pre-populated based on originating Business Process. This field can be changed if the callback should be sent to a different Business Process than the interaction originated from.
6. **Date** - pre-populated to current date of interaction but can be adjusted if different callback date is desired
7. **Start Time** - pre-populated but can be adjusted if different callback time is desired
8. **Customer Time Zone** - not pre-populated and is typically the time zone of the contact the callback is intended for
9. **Routing Type** - Routing Type will depend on preconfigured options based on the Callback Business Process. The callback can go to either a specific agent or team of agents.
10. **Agent/Team** - this will auto-update based on the routing type selected. From here, select the team or agent the callback should sent to.
11. **Remark** - optional. The remark will be presented to the agent handling the callback.
12. Click Save

Callback Panel

1. To schedule a new Callback that is not associated with an active or historical telephony interaction, open the *Callback Panel* and select the **Schedule** icon.



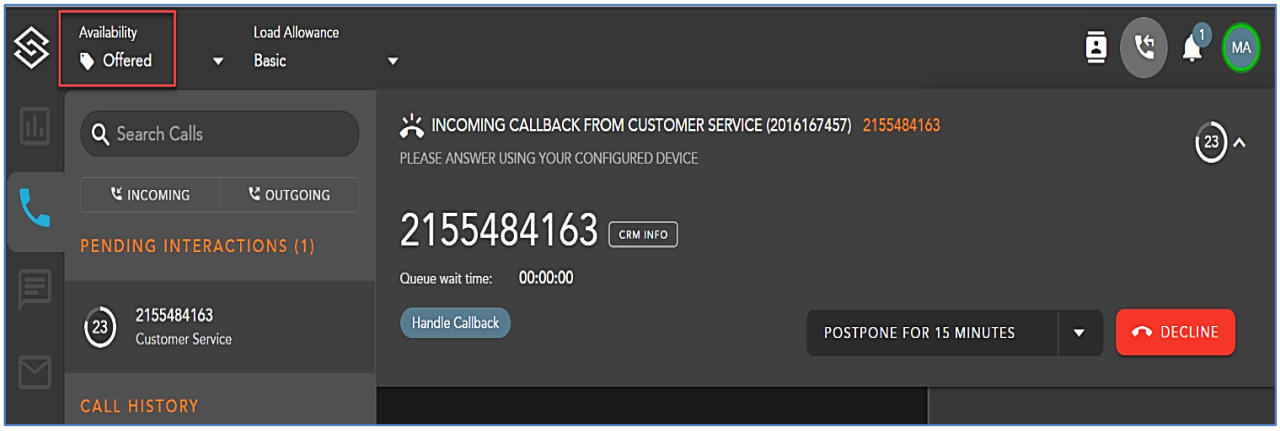
2. The Schedule a Callback window will open. Enter in the following information to schedule a callback (nothing is pre-populated, except for the date and time when scheduling a callback from the callback panel):

a. **Destination** - DID of contact
b. **Callback Business Process** – Business Process the callback should be sent
c. **Date** - pre-populated but can be adjusted if different callback date is desired
d. **Start Time** - pre-populated but can be adjusted if different callback time is desired
e. **Customer Time Zone** - time zone of the contact the callback is intended for
f. **Routing Type** - Routing Type will depend on preconfigured options based on the Callback Business Process. The callback can go to either a specific agent or team of agents.
g. **Agent/Team** - this will auto-update based on the routing type selected. From here, select the team or agent the callback should sent to.
h. **Remark** - optional. The remark will be presented to the agent handling the callback.

3. Click Save
4. If you assigned the callback to yourself. You will see the *Callback Panel* Icon update to show you now have a waiting callback interaction. Open the Callback Panel to view the callback details. If the callback was assigned to a team of agents, you will not see the Callback Panel icon update as the callback was not specifically assigned to you.

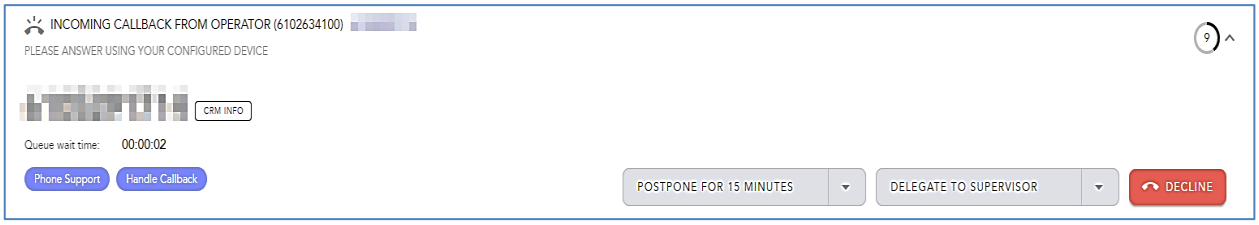
Handling Callbacks

When the callback first presents to an agent, it will be in an **Offered** interaction state.



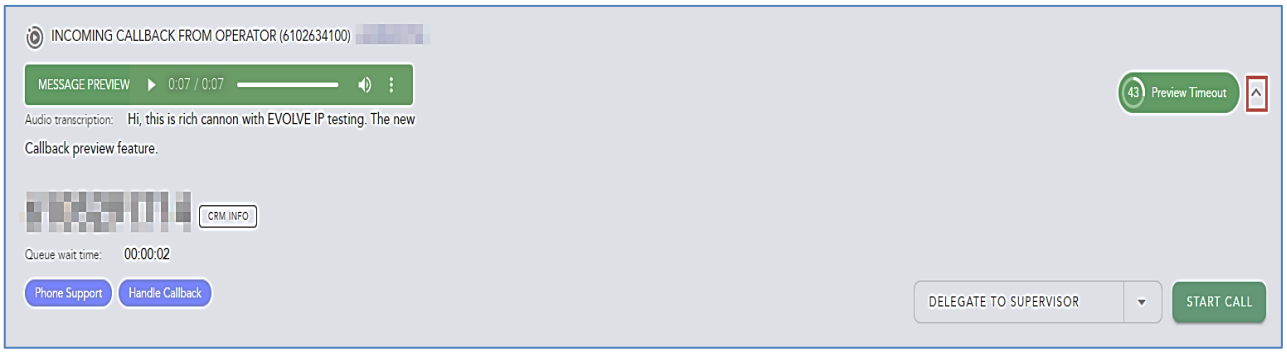
If usage of Preview state is configured in Supervisor under the Callback Timing tab, the interaction will update to **Preview**. During this time, the Agent can listen to a callback recording and/ or view a callback transcription.

The callback will present itself normally in the eAgent.



The call popup should be accepted on your telephony endpoint (I.E Teams, UC-1, WebEx, SIP Phone etc.)

When a recording and preview mode is enabled, the following screen will display indicating the agent is in "Preview" state.



On this screen the agent can review the transcription as well as listen to the audio of the callback.

Message preview allows the agent to play the recording, scrub forward and backwards (still pending in future release) as well as download the audio file to their desktop.

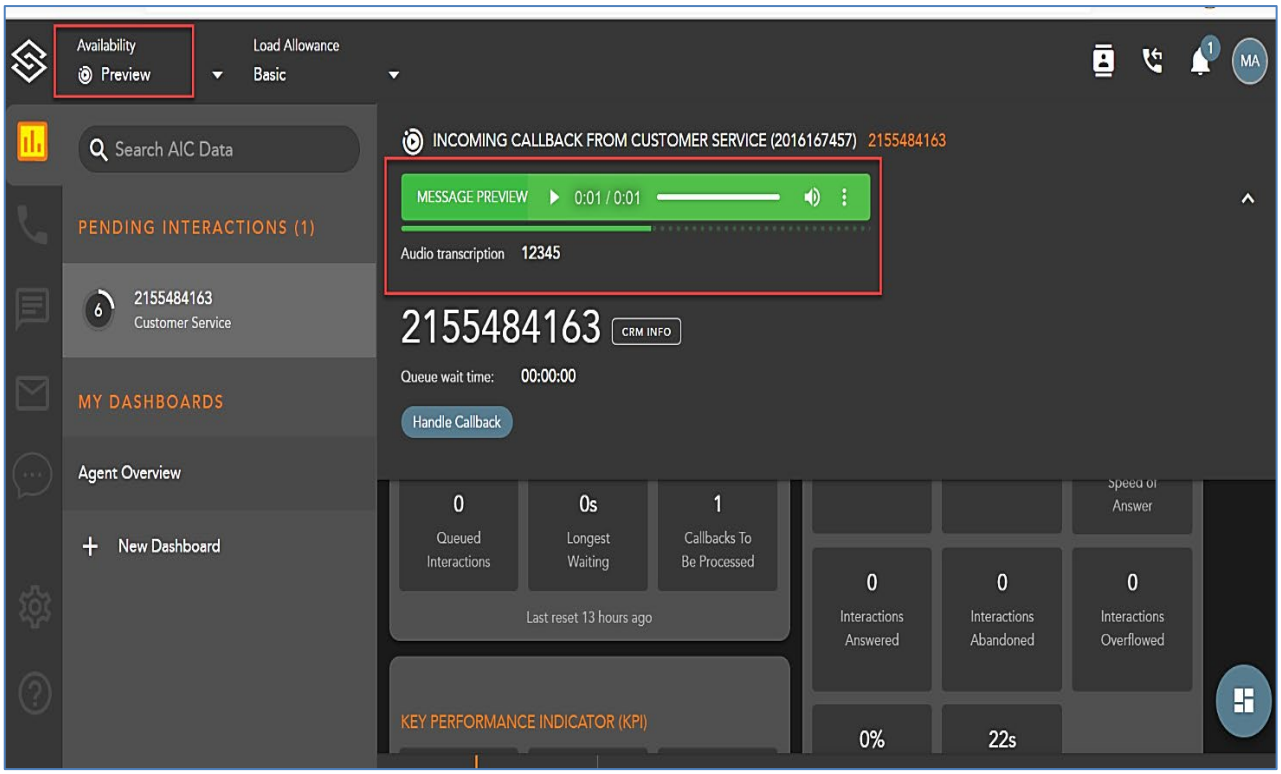
The preview pane can minimize and maximize by selecting the chevron highlighted in red.

To start the call before the preview time ends, select the "Start Call" icon. Remaining preview time is listed as a countdown as "Preview Timeout"

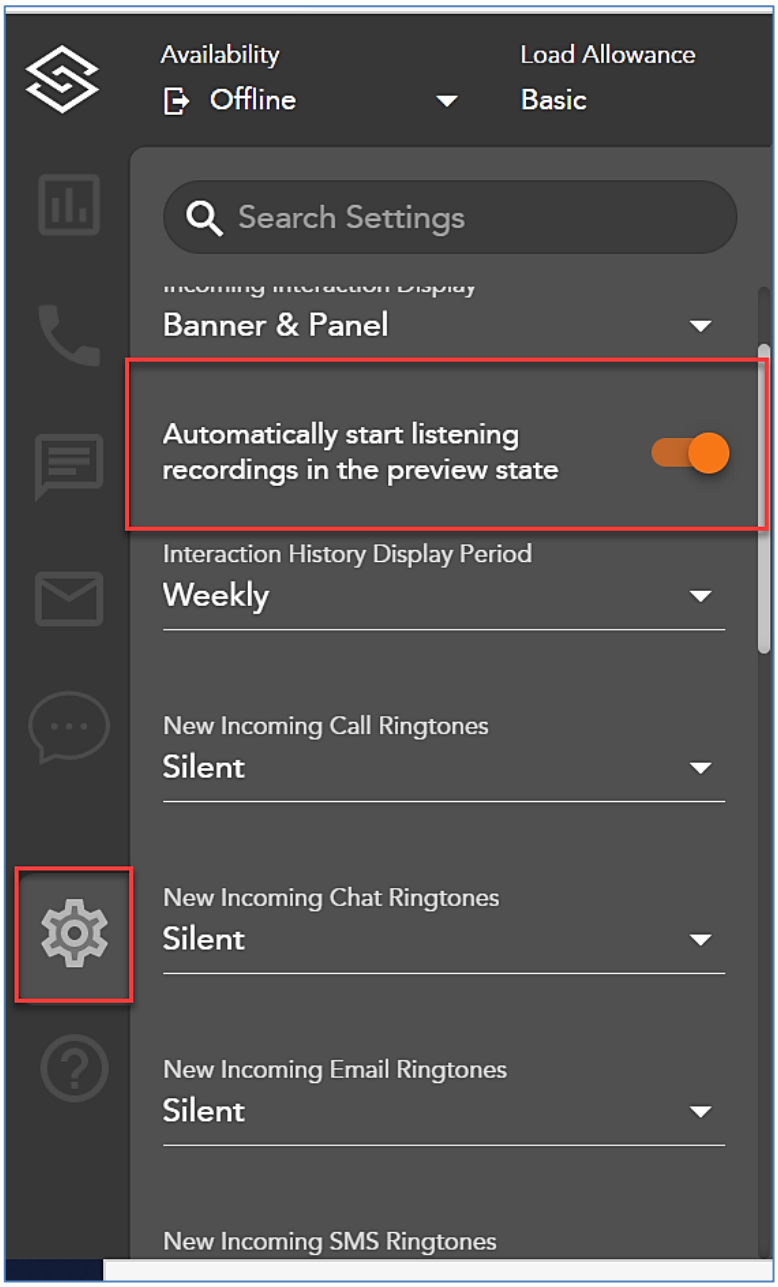
In eAgent settings "Auto off-hook state" must be enabled to use the "Start Call" feature.

Agents can also enable the recording auto-play by enabling "Preview State Automatic Playback".

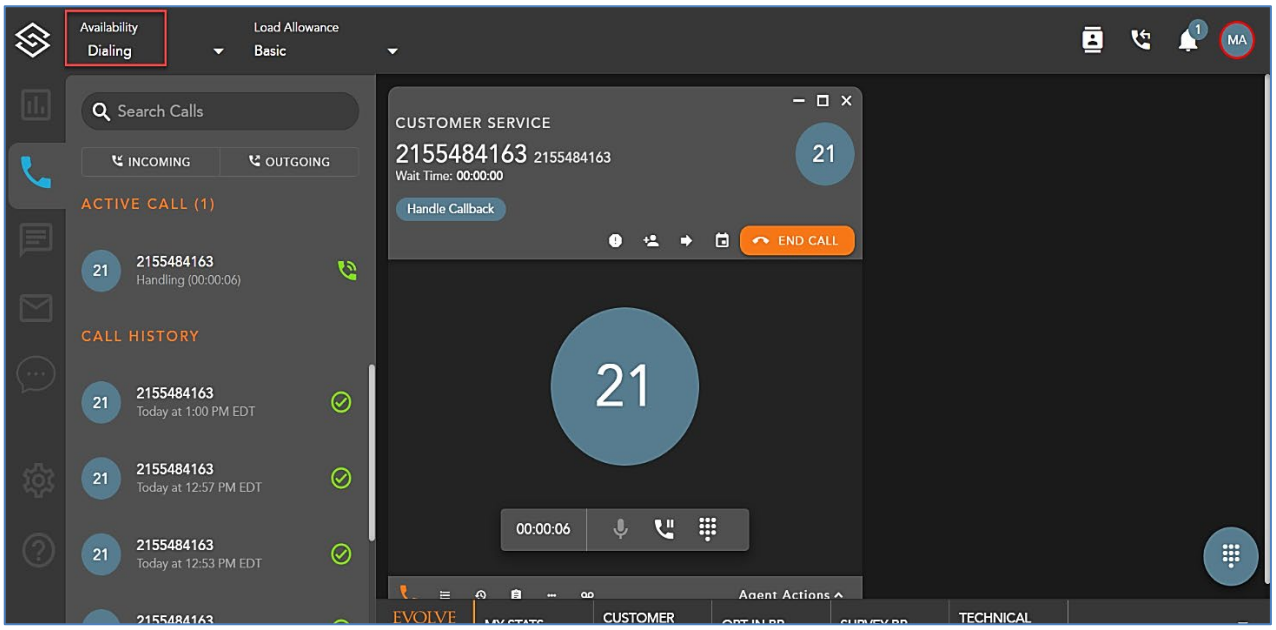
By clicking in the audio progress bar, the Agent can rewind or go fast forward.



Agents have the option to configure settings so that callback recordings automatically start to play when the callback offer is accepted.

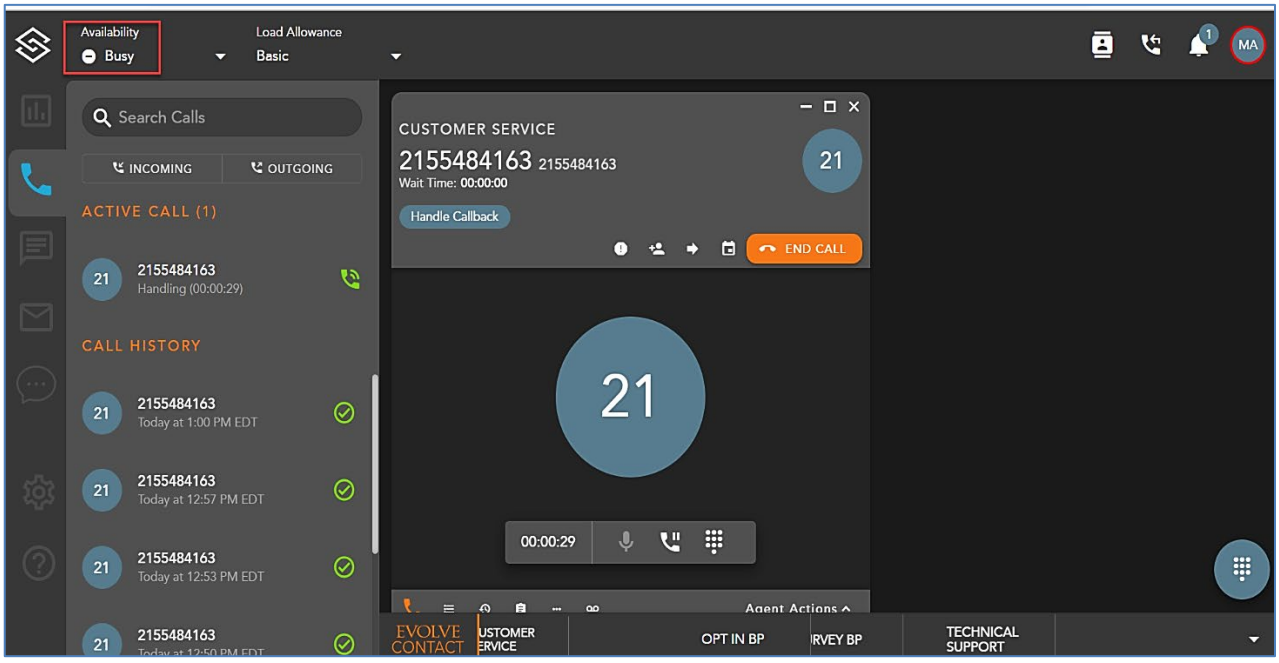


After the callback recording time has expired or the callback is accepted, the interaction state will update to **Dialing**. ECS will now begin dialing out to the requested callback number.



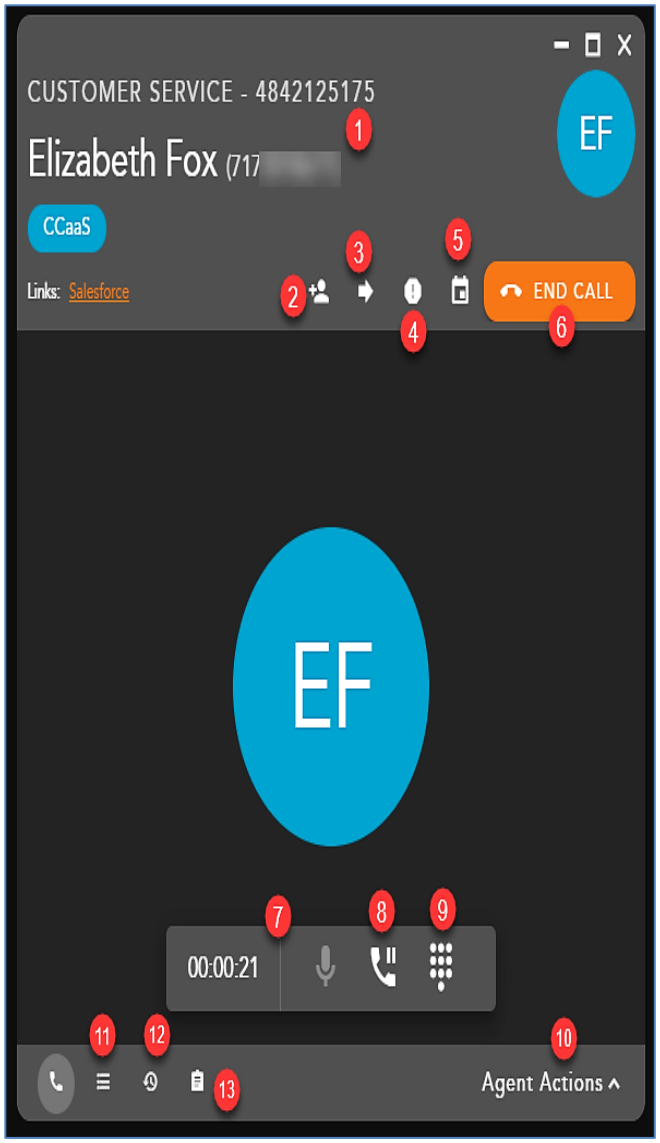
- The callback will dial for 60 seconds (this is configurable within supervisor: *Item A Duration For No Answer*)

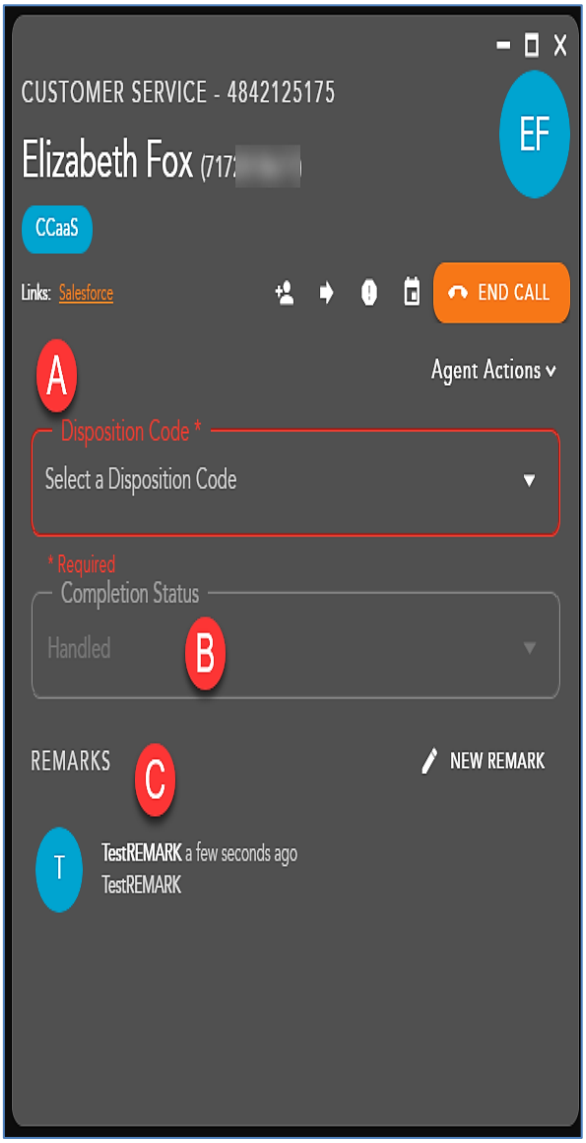
Note: If the Agent has other active interactions before the callback offer, the Agent state is displayed as "Busy".



Handling Call Interactions

Telephony Interaction View





1. **Telephony Interaction Header** - displays the following information regarding the contact:
    a. Customer Name and DID
    b. Originating Business Process
    c. **Demands** - specific demands assigned to the interaction via the handling flow and utilized to assign the interaction to the appropriate agent

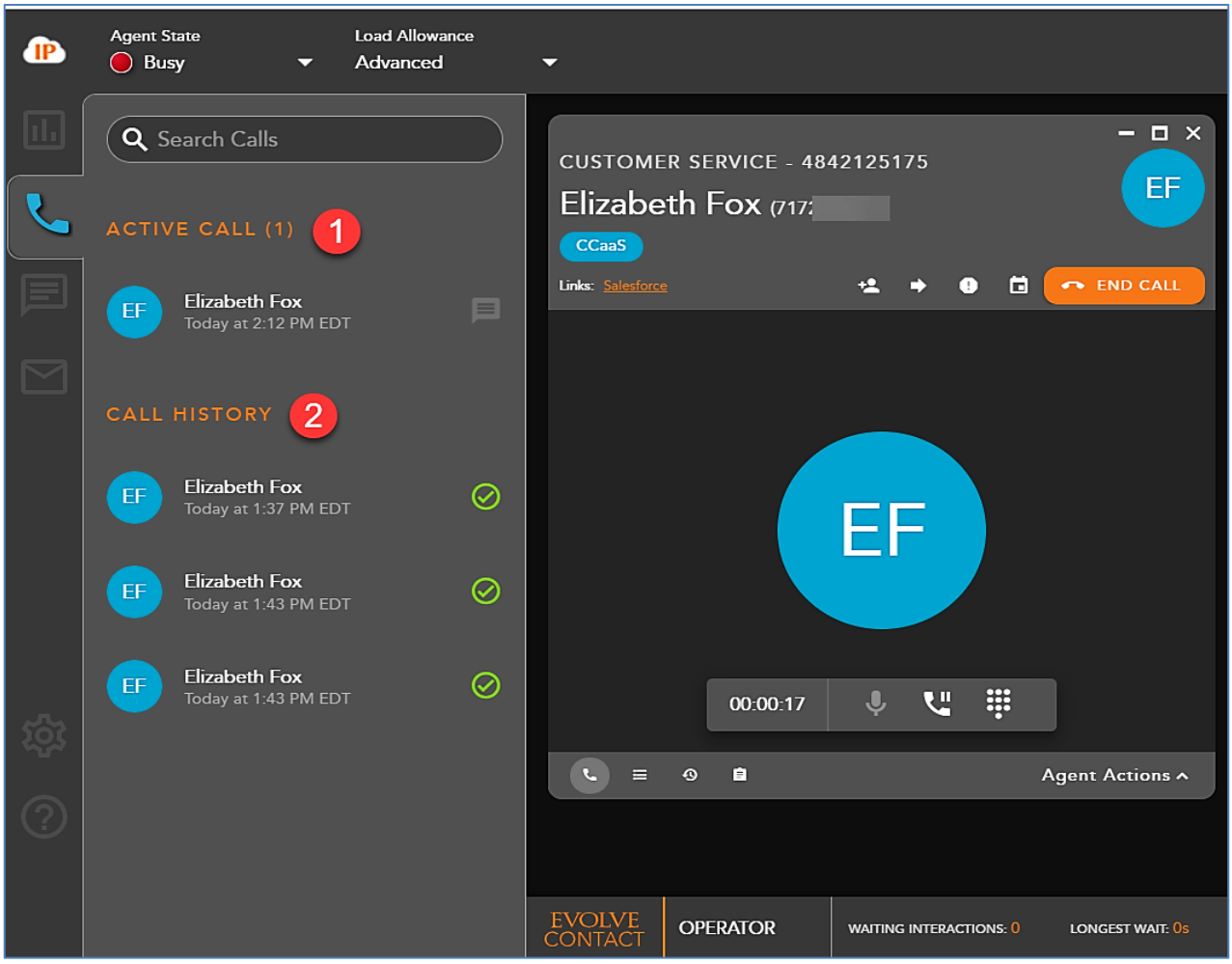
   d. **External Links** - hyperlink to open to a URL configured in the Setup client. The links can integrate with a CRM or internal knowledge base, which contains specific information about a customer or help documents. By clicking on a link, you will be redirected to the predefined URL, providing more detailed information on the person they are working with or help documentation.

2. **Consult** - initiates a consulted transfer with another Agent, Supervisor, Business Process, Enterprise user or 10-digit DID. Once the transfer has been initiated and accepted, the ability to start a conference will become available.
3. **Blind Transfer** - initiates a blind transfer to another Agent, Supervisor, Business Process, Enterprise user or 10-digit DID.
4. Add to Do Not Call (DNC) List
5. Schedule a Callback
6. End Call
7. **Call Recording Controls** - Call recording controls will be available based on the call recording profile assigned to the agent. If the agent is set to always be recorded no call recording controls will be present. Controls will only be present if the agent can start/stop or pause/resume a recording.
8. Hold/Resume
9. Dialpad
10. **Agent Actions** - selecting agent actions will change the telephony screen to show the following options:
    a. **Disposition Code** - pre-defined code to indicate the outcome of the interaction. These codes are specific to the Business Process and can be customized for each Business Process.
    b. **Completion Status** - explanation as to why the interaction ended. A status may be selected during or after an interaction. The completion statuses available will depend on the type of interaction handled
    c. **Remarks** - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks.
11. **Contact** - saved contact information. If the CRM panel is enabled through the Setup client, you will be able to edit an existing contacts information or add a *new* contact to the contact management system if they are new to the contact center.
12. **History** - displays all interaction history the contact has had with the contact center
13. **Notes and Remarks** - will display all system and agent added remarks and notes for the contact.

Call Interaction Sidebar

The call interaction sidebar displays your:

1. Active Call Interactions
2. Call History

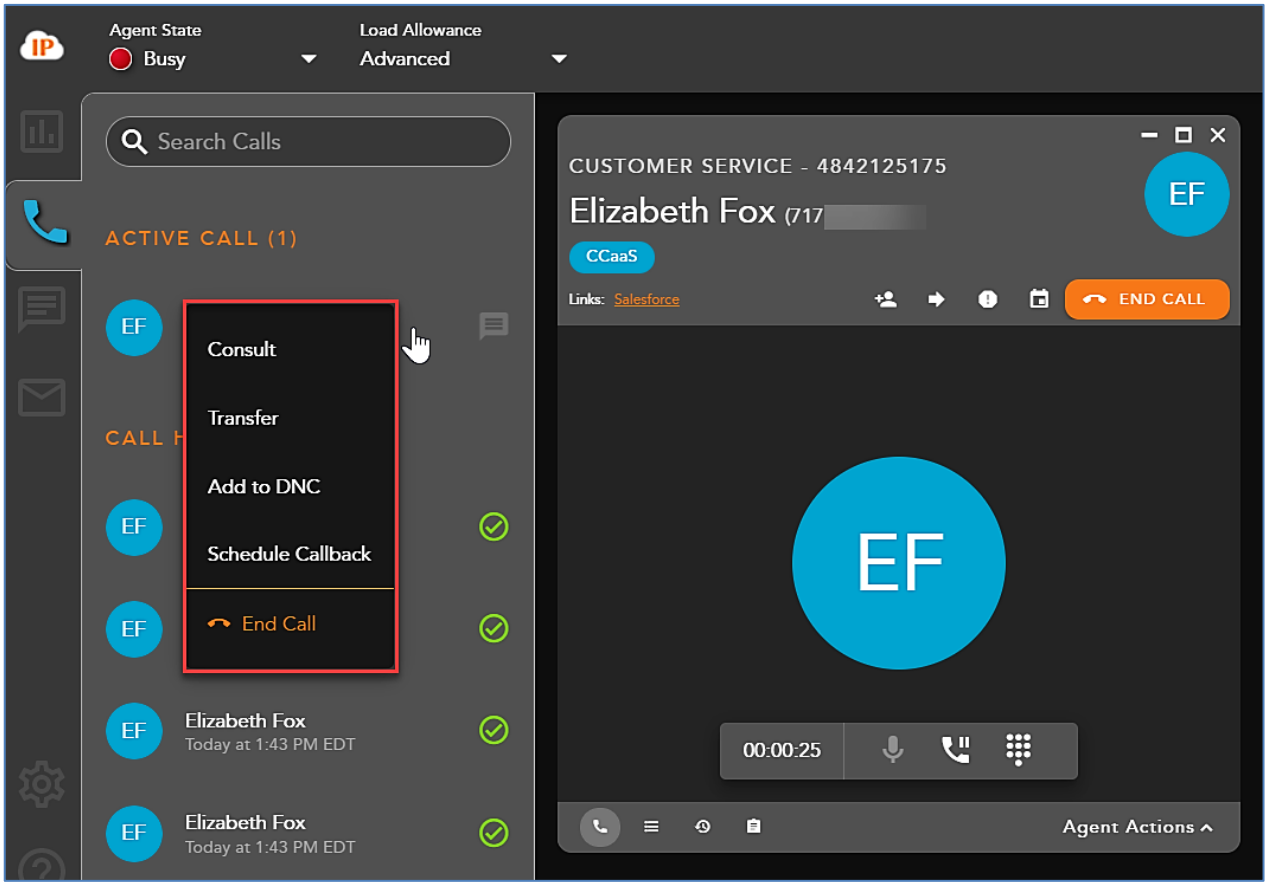


Active Call Interactions

The Active Call field displays all active call interactions. Each active call will display the name of the contact and the current call duration

If a call is put on hold the *Active Call header* will change to **On Hold** and the active call icon will change to show which call is currently on hold.

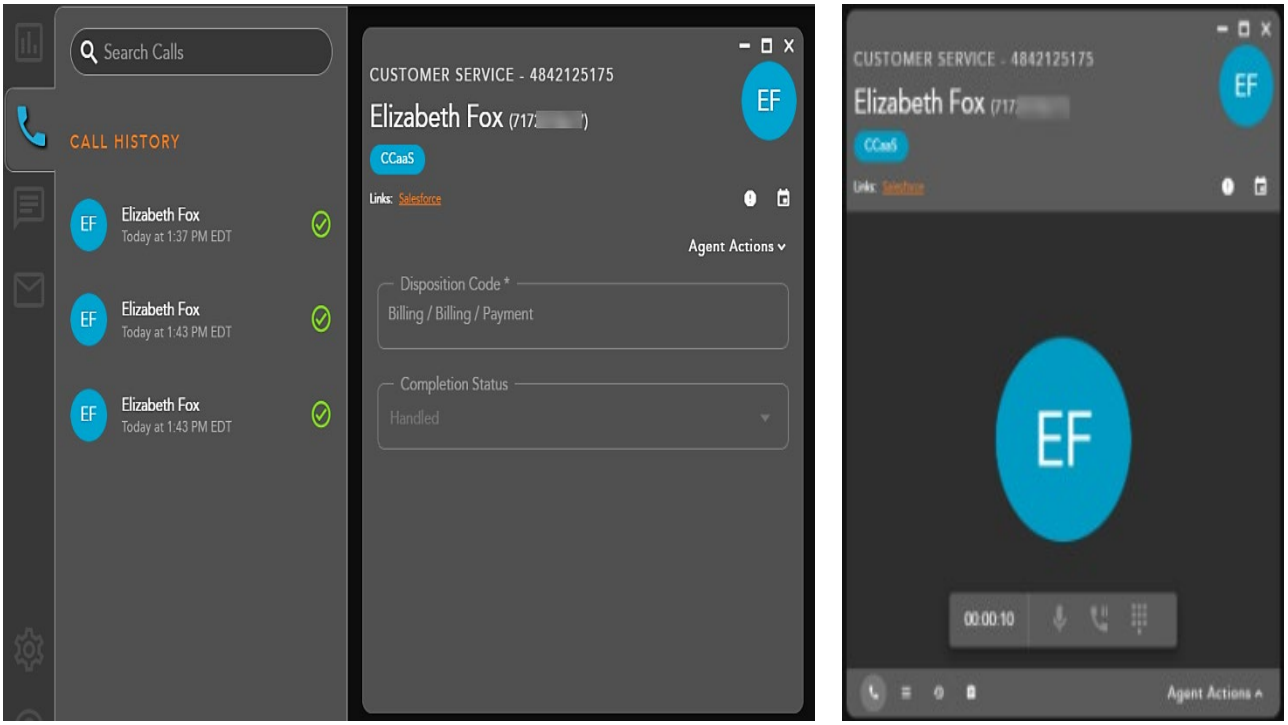
Right-click on an active interaction will provide call control options from the Interaction Sidebar.



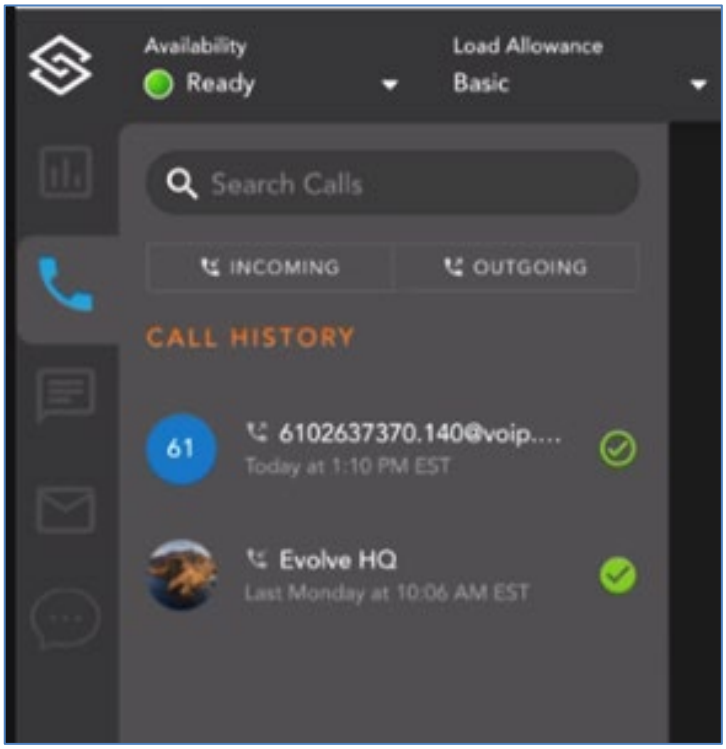
Call History

Call history will show all recent historical call interactions, including the customer name, date and time the interaction was handled.

Double clicking on a historical interaction will open the interaction and display the call history, completion status and disposition code applied to the interaction.

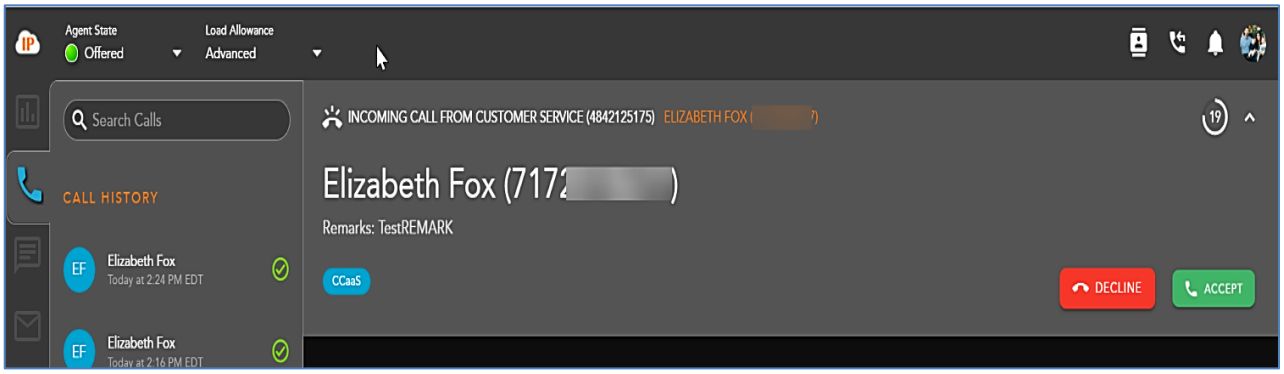


Call history can be filtered by incoming and outgoing calls.



Incoming Call Interaction

Accepting a Call



When a new call interaction is being offered to an agent, the call can be answered on either your handset or UC One. The following information will be present for review within the Incoming Interaction Banner before accepting the interaction:

1. Interaction Type
2. Customer Name and DID
3. Originating Business Process
4. **Interaction Handling Remarks** - prepopulated through the Interaction Handling Flow configured in the Setup client. If no remarks are present for the interaction this field will not be visible on the interaction.
5. **Demands** - specific demands assigned to the interaction via the handling flow and utilized to assign the interaction to the appropriate agent

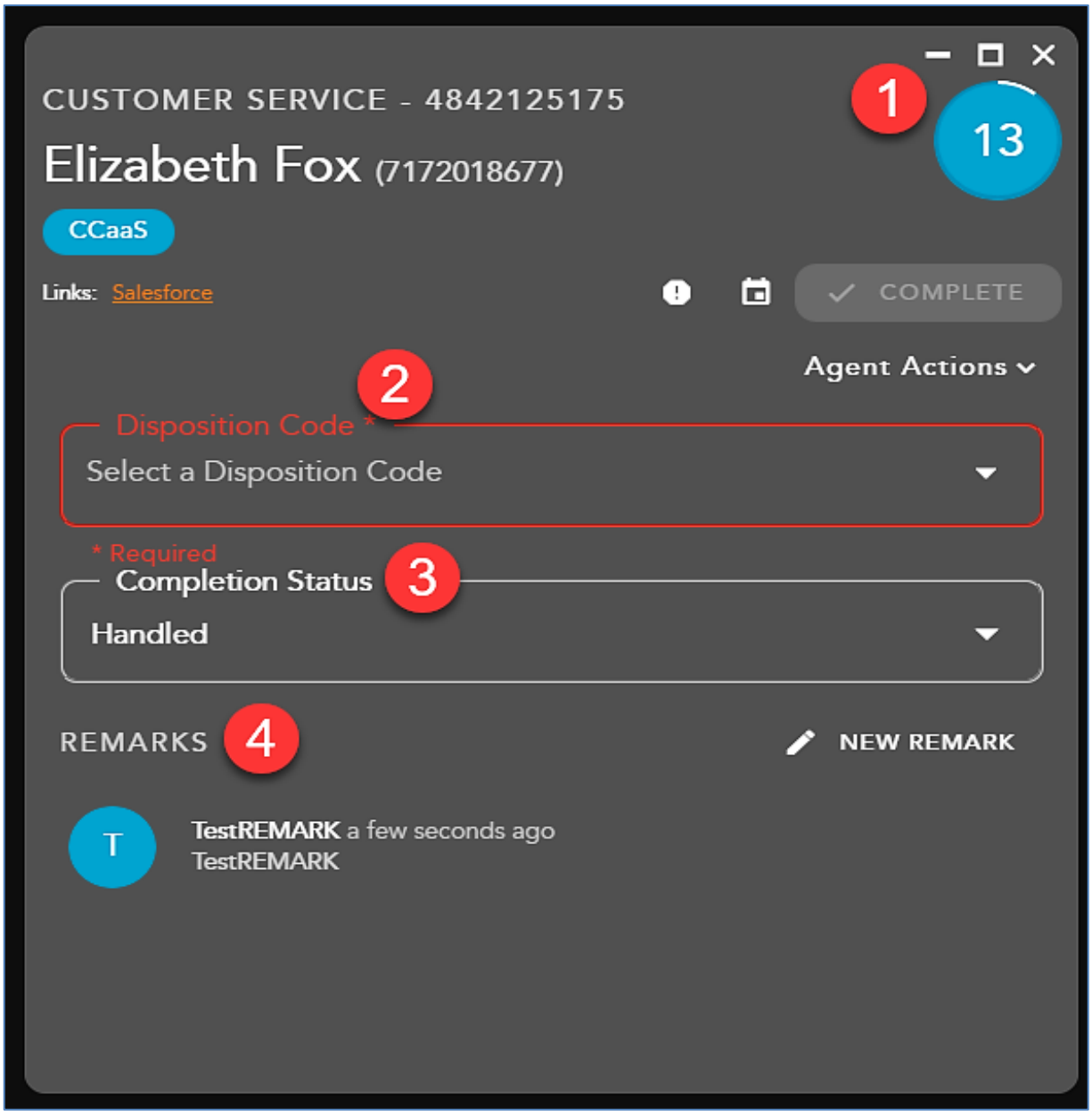
To decline and send the interaction back to queue, select **[Decline]**. Note, if you are the only ready agent in the Business Process, the interaction will continue to present itself until accepted or another agent becomes ready.

To accept the interaction via your handset, select **[Accept]**. This will work only if utilizing the handset. If the agent is using the agent application and uc one, the agent must answer the call directly on UC One.

Completing an Interaction

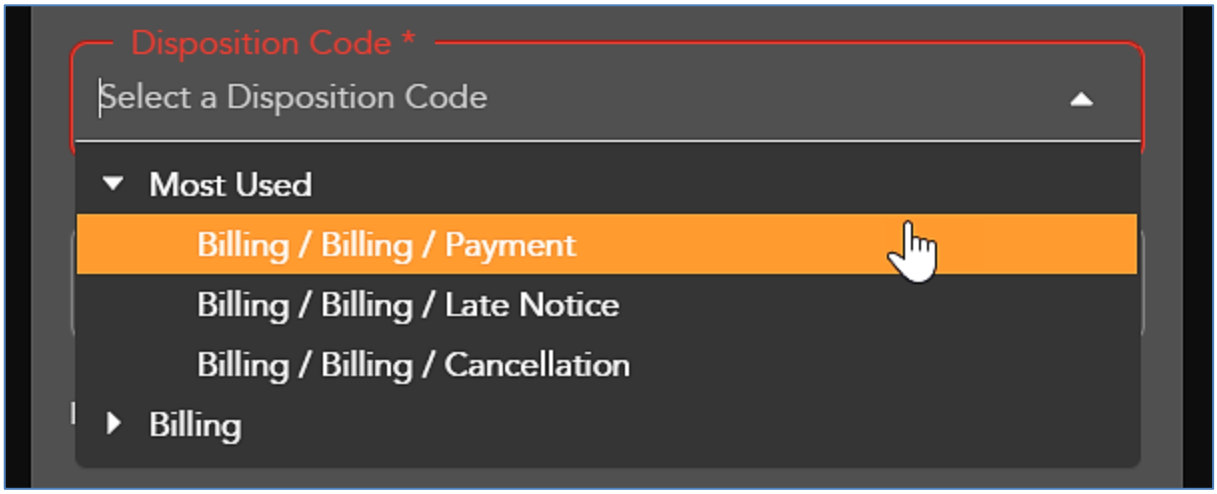
To end a call interaction, select **End Call**. When a call is ended, if pre-configured in the Setup Client, you will be put into a wrap-up state to complete the call. If no wrap-up has been configured, you will be put back into a Ready state to handle the next queued interaction.

If Wrap-up has been configured, the following options will be available to complete the interaction:

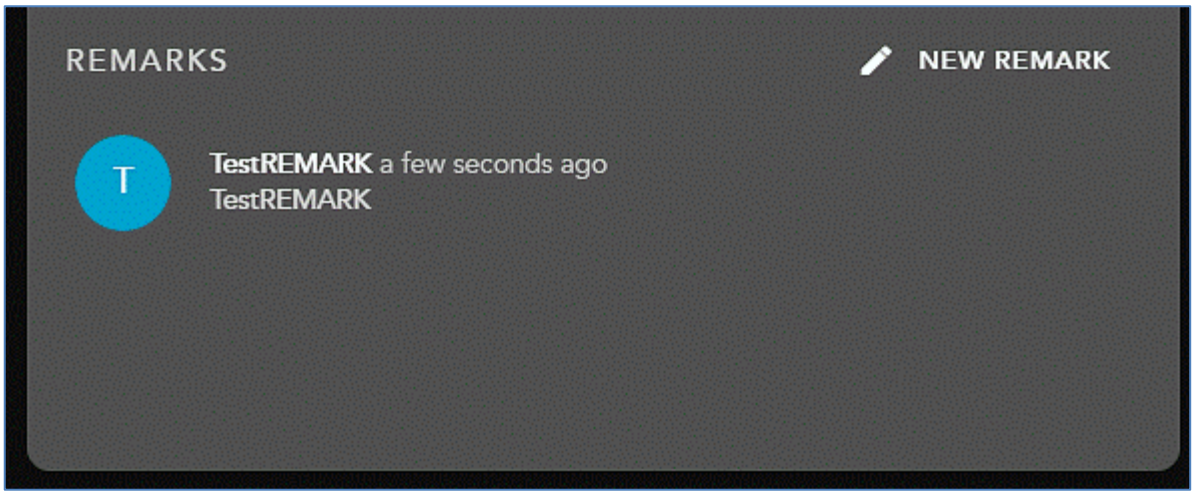


1. **Wrap-up Timer** - counts down the amount of time left in wrap-up

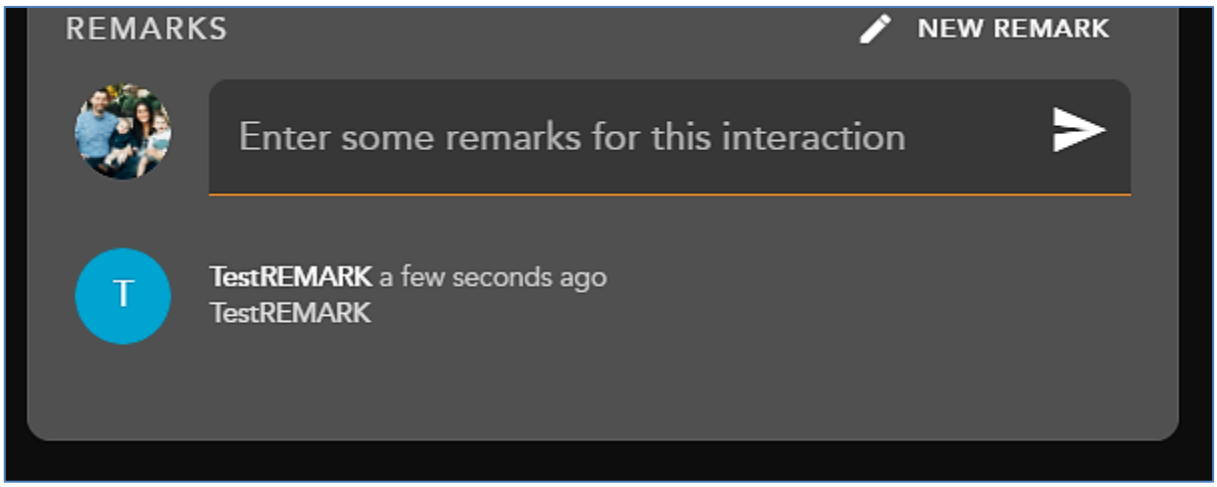
2. **Disposition Code** - apply a disposition code to the interaction. If no disposition codes have been configured for the originating Business Process this option will not be available. By default, your three most used disposition codes for the originating Business Process will be at the top of the disposition drop down, followed by all disposition code categories and subcategories.



3. **Completion Status** - result of the interaction. The completion statuses available will depend on the type of interaction handled.
    a. Handled - default value for completed interactions. The interaction was completed and handled.
    b. Delegate to Supervisor - this option is only available if enabled for agents in the Setup Client. Once a call has ended, agents can delegate a call to a supervisor with remarks attached providing an explanation as to why the interaction has been delegated to a supervisor
4. **Remarks** - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks.



a. To add a new remark to the interaction, select **[New Remark]**. Once selected the remarks field will open to add a new remark.

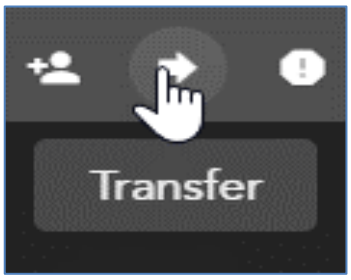


Once you have filled in the required fields select **[Complete]**. This will complete the interaction and put you back into a Ready state. If you do not manually select complete and wrap up is configured, the interaction will complete automatically after the wrap-up period has ended. Once an interaction has completed, it will appear under your call history within the Interaction Panel.

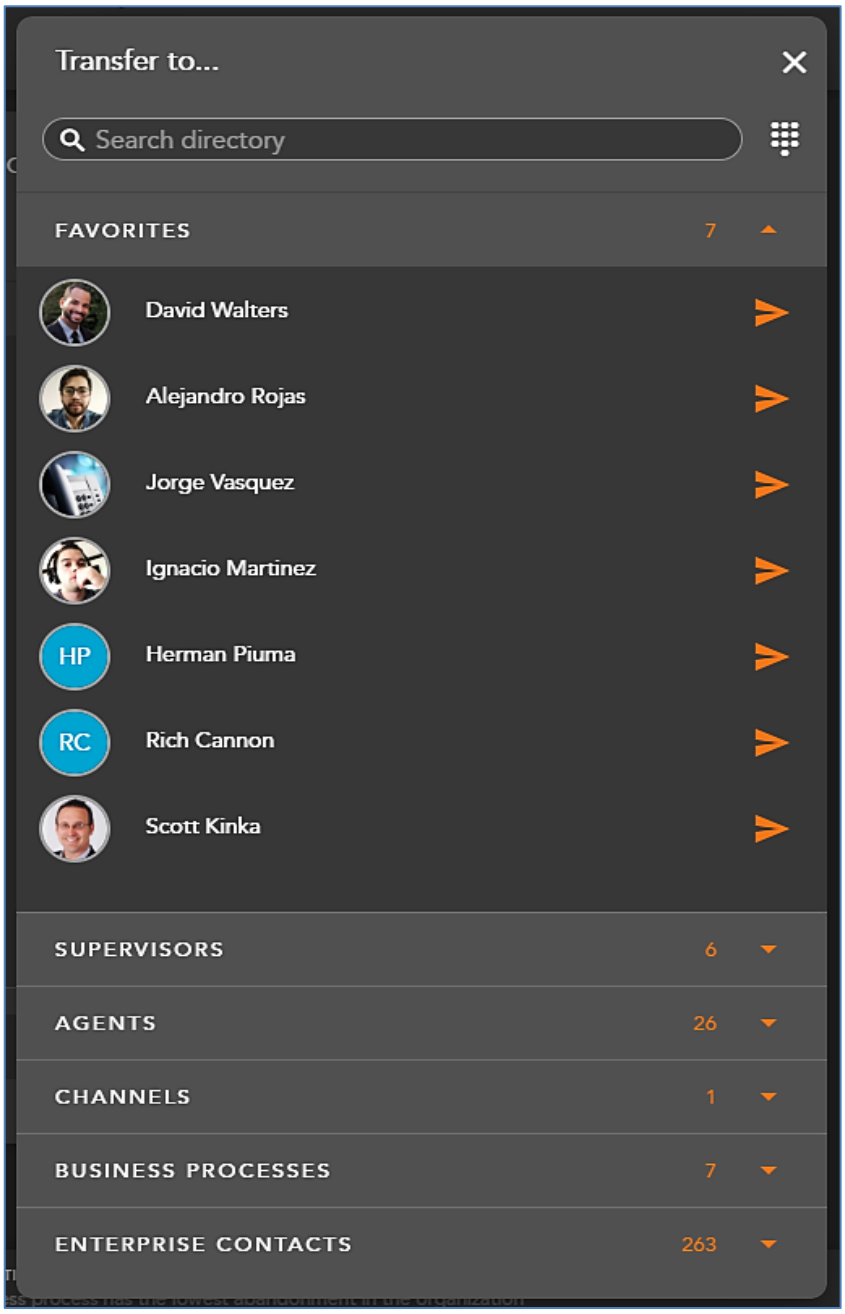
Transferring a Call

BLIND TRANSFER VIA DIRECTORY

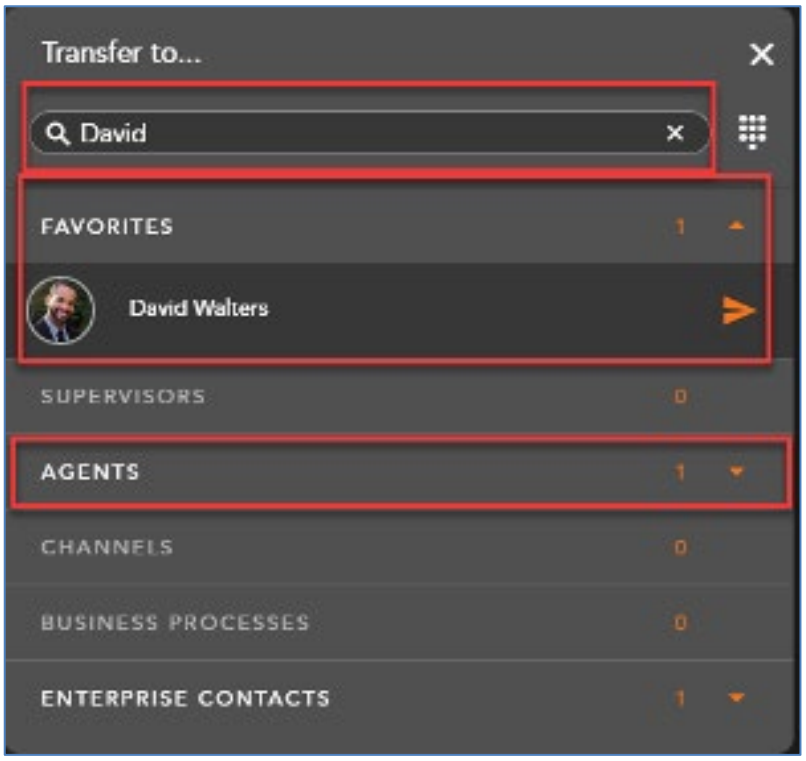
To transfer a call to another Agent, Supervisor, Business Process, Channel, Enterprise User or DID select the Transfer Icon within the interaction toolbar.



The Transfer window will open and default to Favorites.

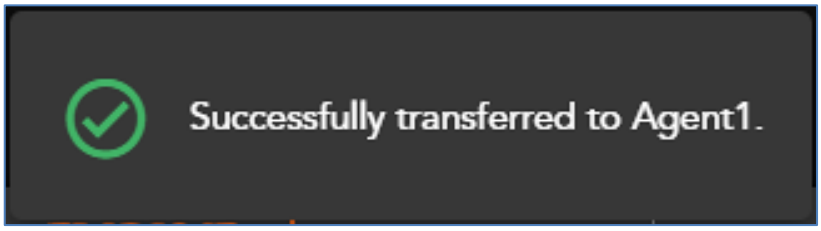


Within the search bar you can type the name of the user you wish to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.

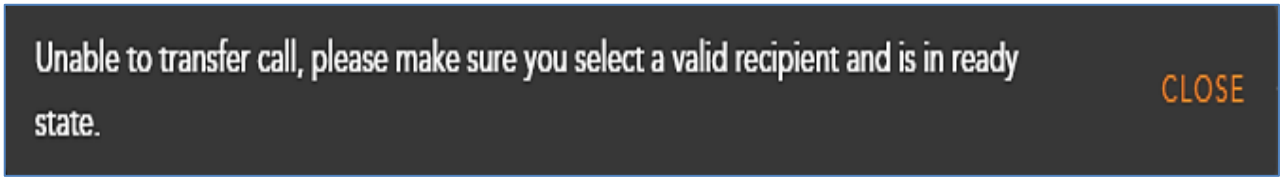


Select the transfer arrow to complete the transfer.

The interaction window will disappear followed by a transfer success message.

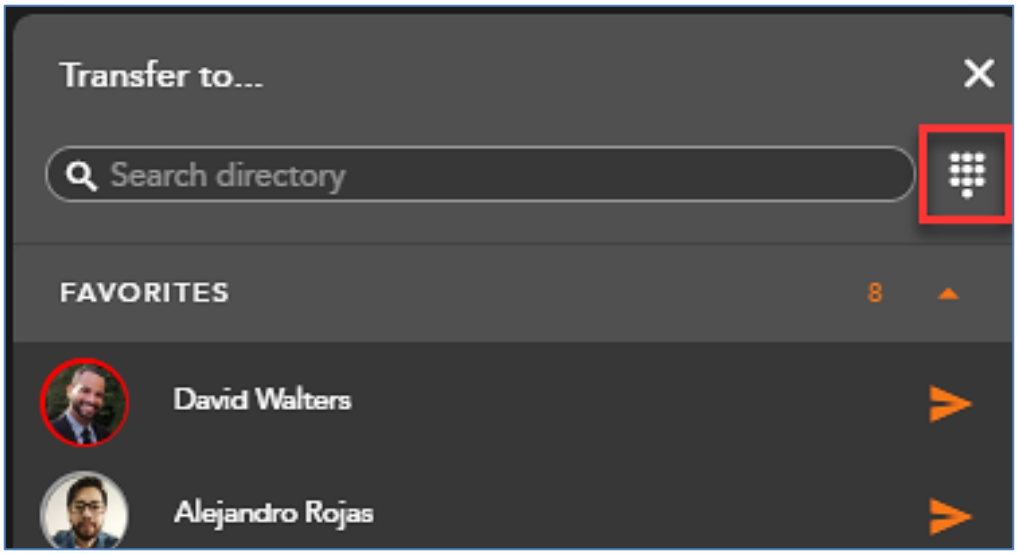


**Transfers can only be sent to agents and supervisors in a Ready or Handling Outgoing state. If you attempt to send a transfer to a Busy agent, you will receive the following error message:*

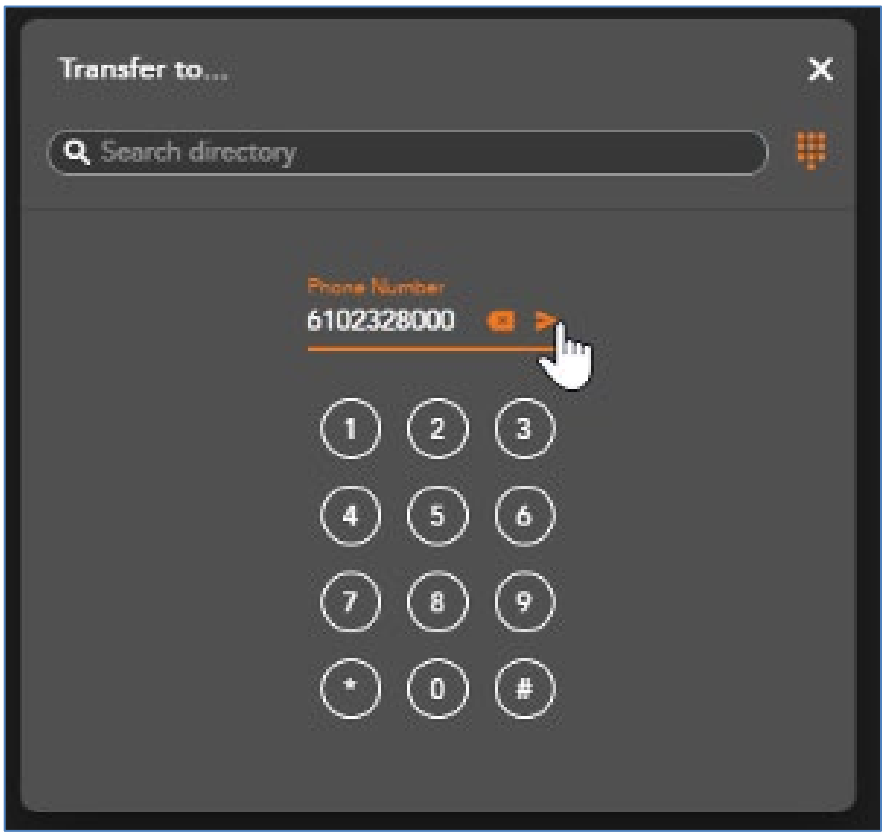


BLIND TRANSFER VIA DIAL PAD

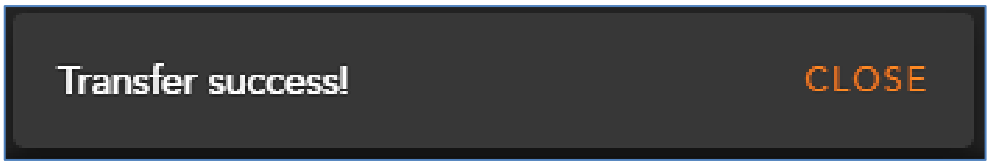
If you wish to transfer the call to a 10 digit DID, select the Dial Pad Icon within the transfer window.



Type in the number and select the transfer arrow to complete the transfer.



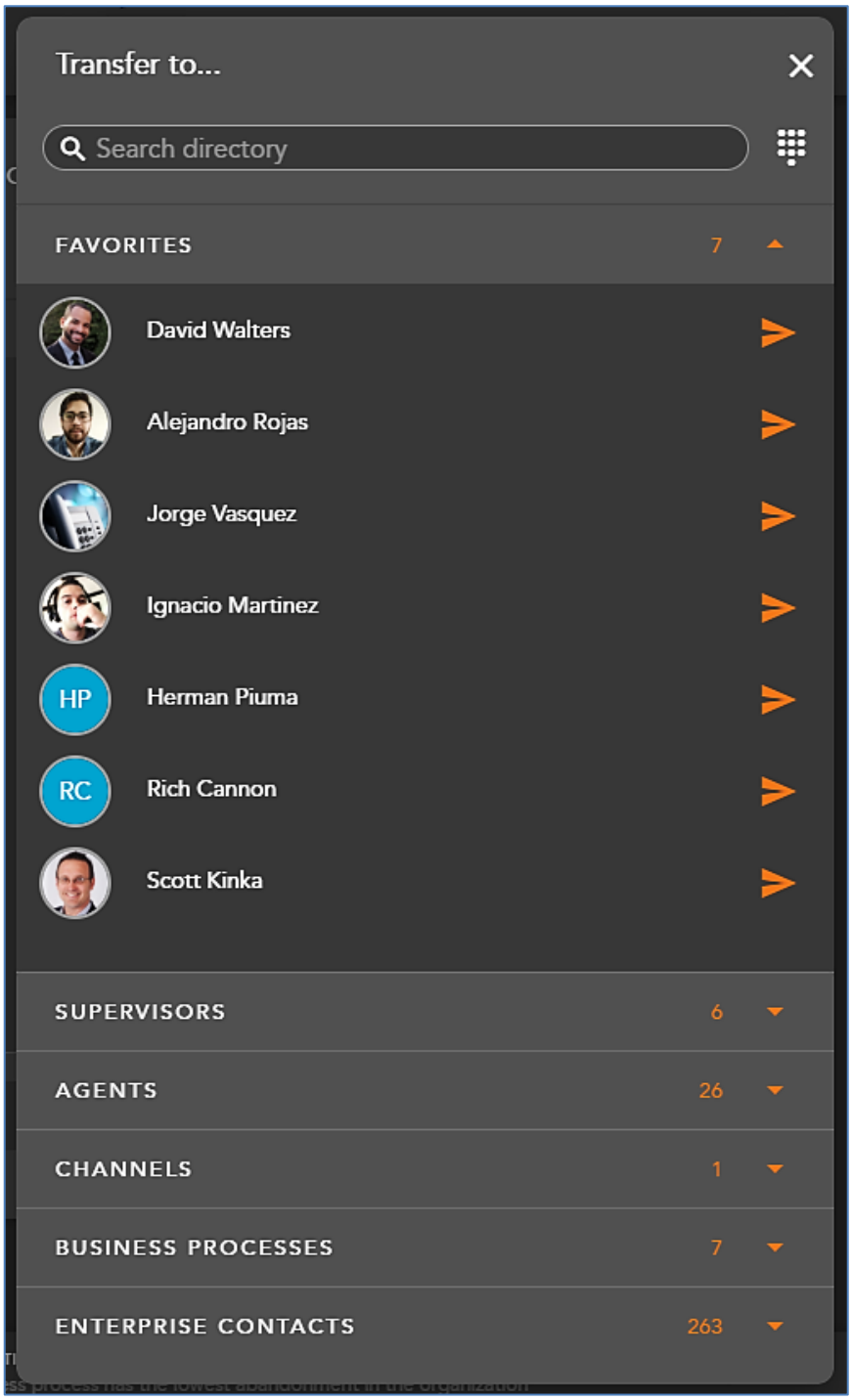
The interaction window will disappear followed by a transfer success message.



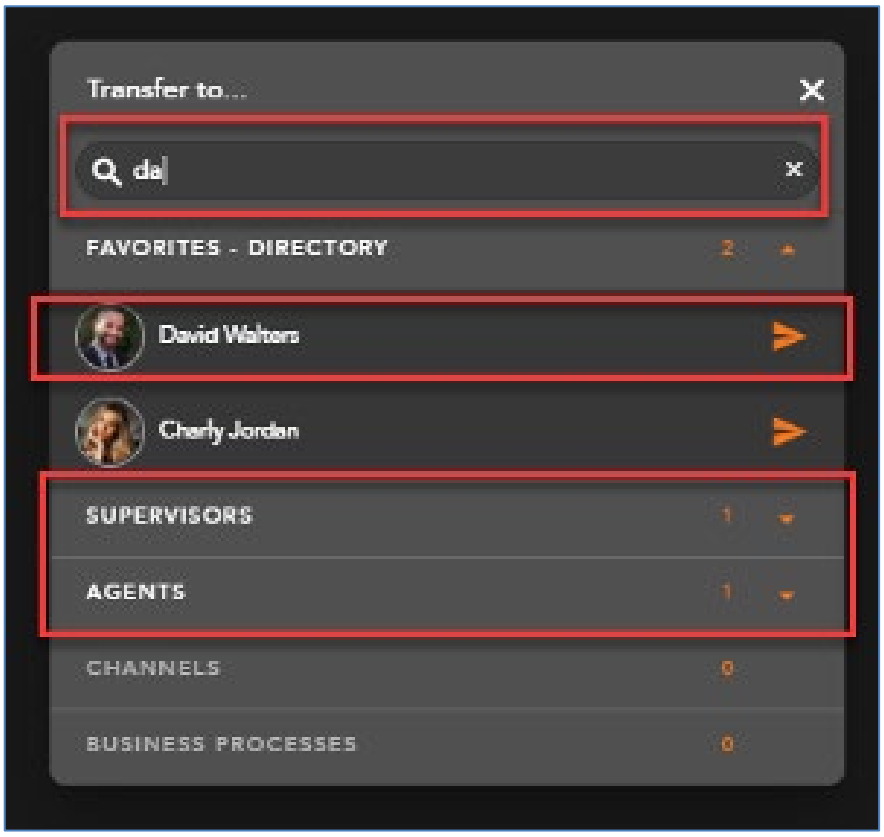
CONSULTED TRANSFER

To perform a consulted transfer select the Consult Icon within the interaction toolbar.

The Transfer window will open and default to Favorites.

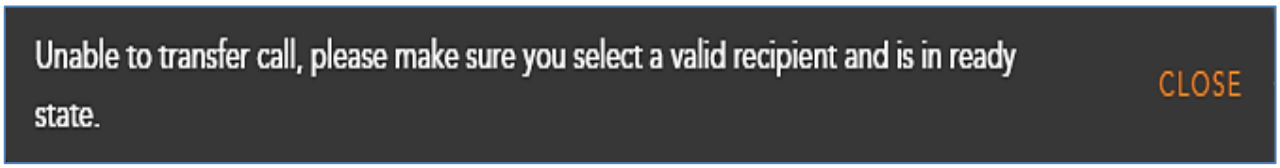


Within the search bar you can type the name or the User (Agent, Supervisor or Enterprise Contact), Business Process, or Channel or manually enter in a ten digit number using the dial pad to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.



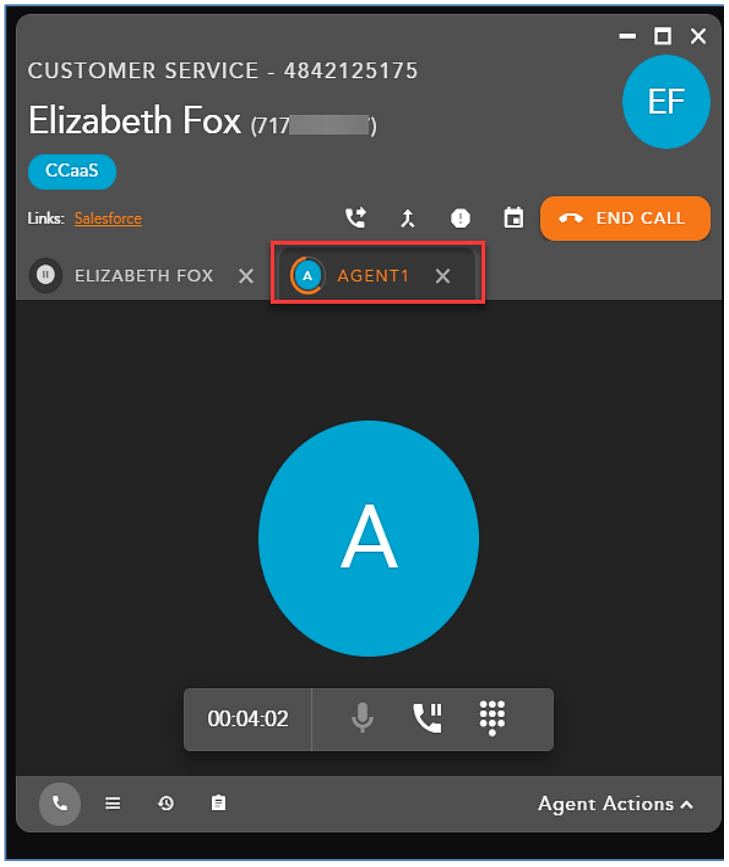
Select the **transfer arrow** to initiate the consulted transfer.

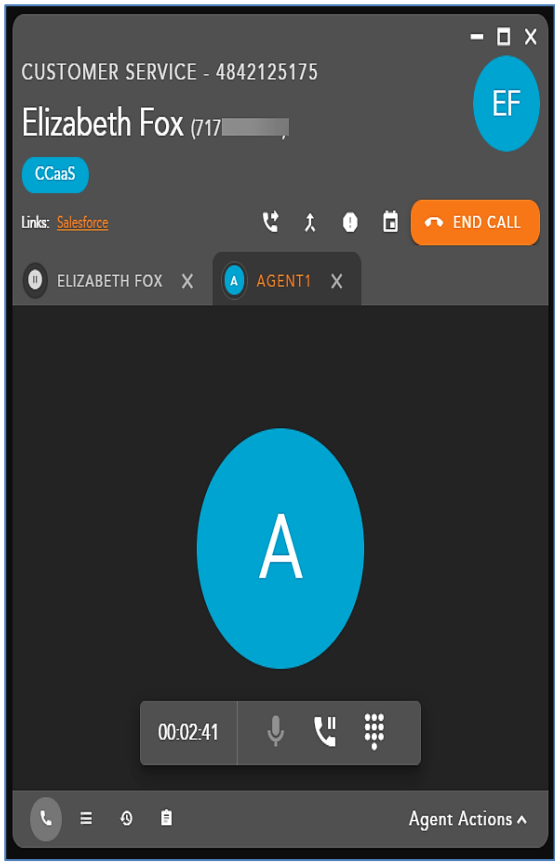
**Transfers can only be sent to agents and supervisors in a Ready or Handling Outgoing state. If you attempt to send a transfer to a Busy agent, you will receive the following error message:*



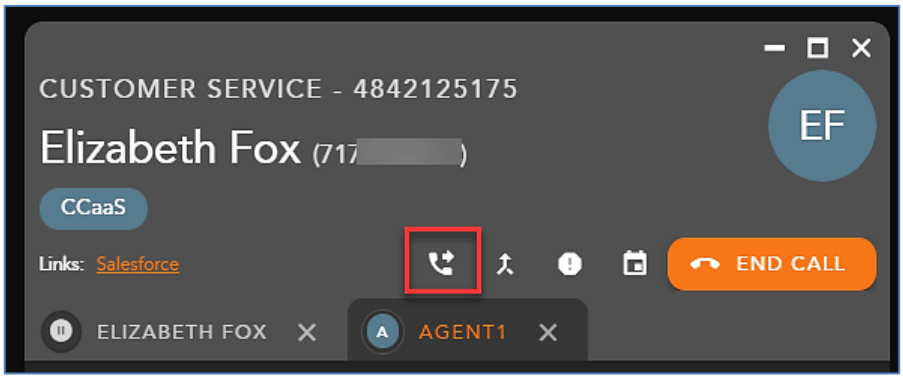
When the transfer has been initiated, your call window will split into two tabs and the customer will immediately be put on hold. The first tab is the established conversation between you and the customer and will display the customer name or ID. The second tab is the initiated consult.

The second tab will initially show a waiting indicator until the end user accepts or declines the call.



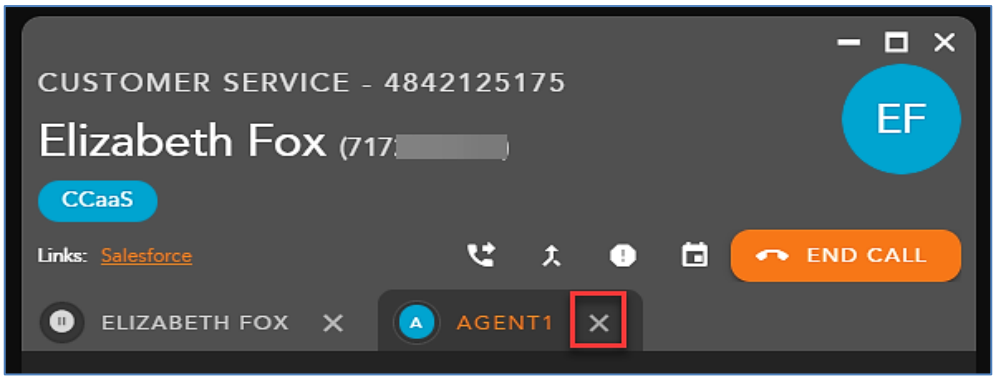


Once the call has been accepted select the transfer icon to complete the consulted transfer.

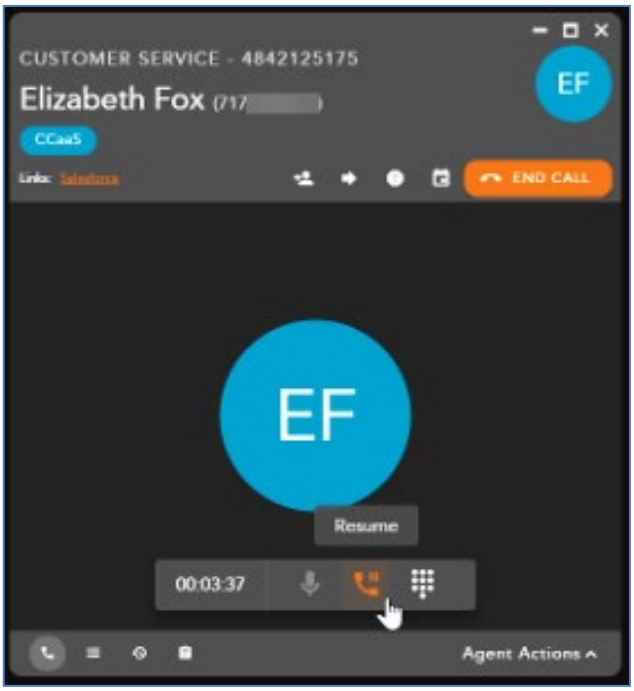


The interaction window will disappear followed by a transfer success message.

If the consulted party does not wish to take the interaction, exit out of the tab



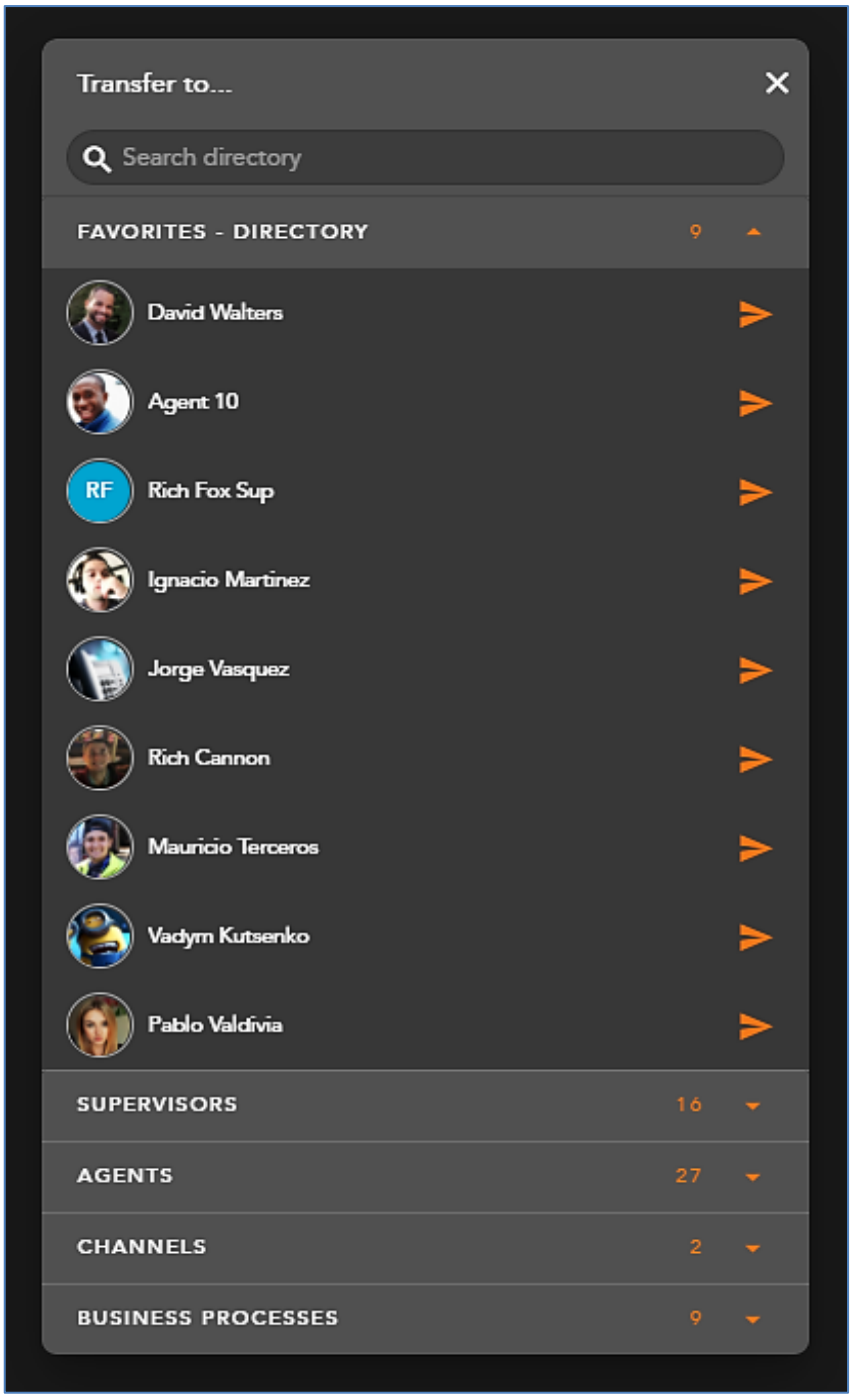
The call will drop, and the call will need to be resumed with the customer.



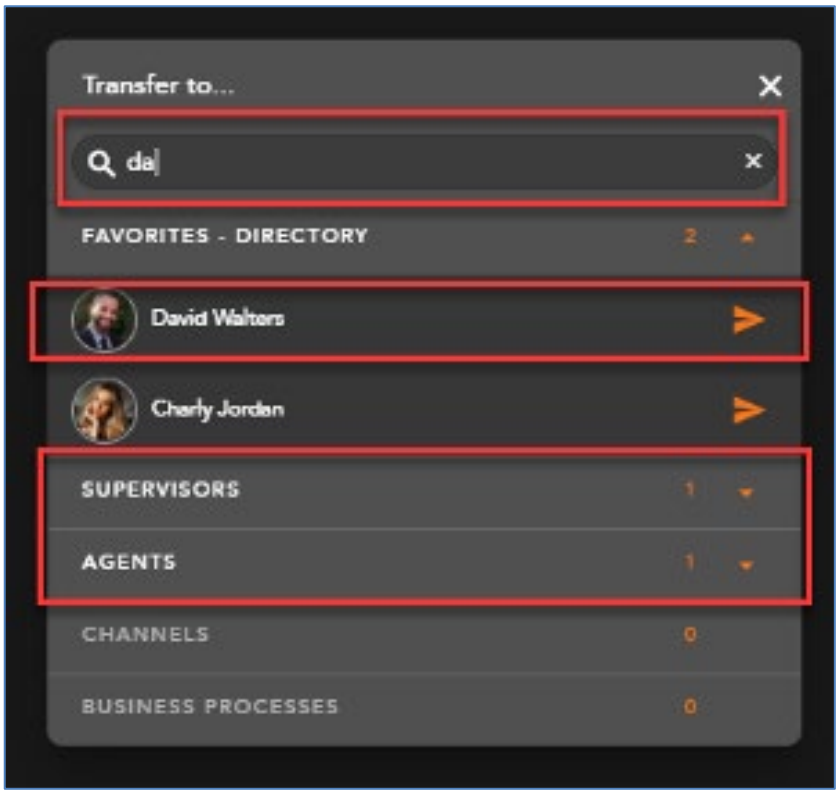
Initiating a Conference

To initiate a conference call with a third party select the Consult Icon within the interaction toolbar.

The contacts window will open and by default your favorites will be expanded.



Within the search bar you can type the name of the User (Agent, Supervisor or Enterprise Contact), Business Process, or Channel or manually enter in a ten digit number using the dial pad you wish to conference into the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.

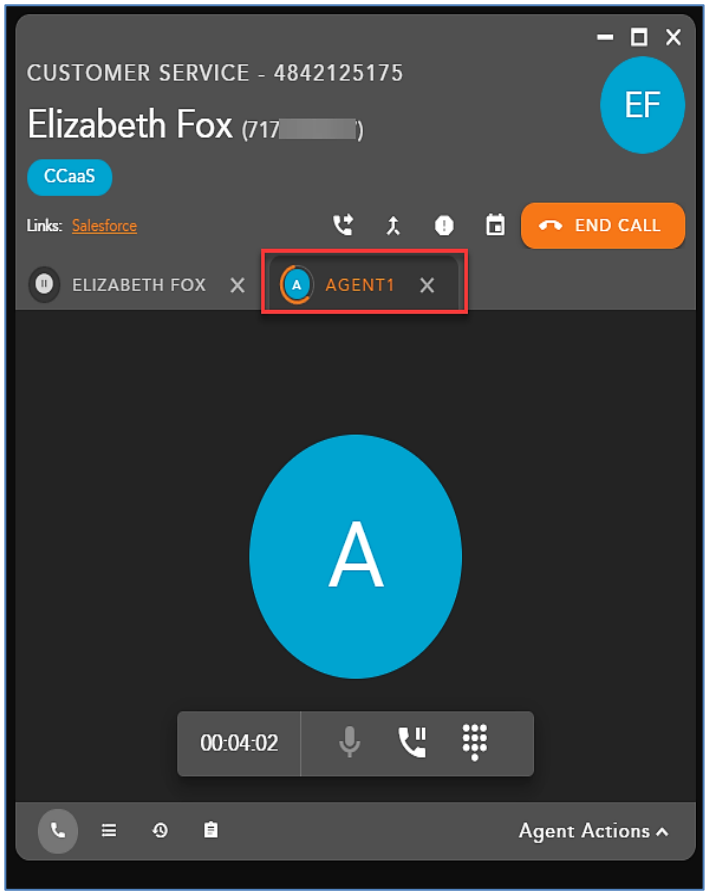


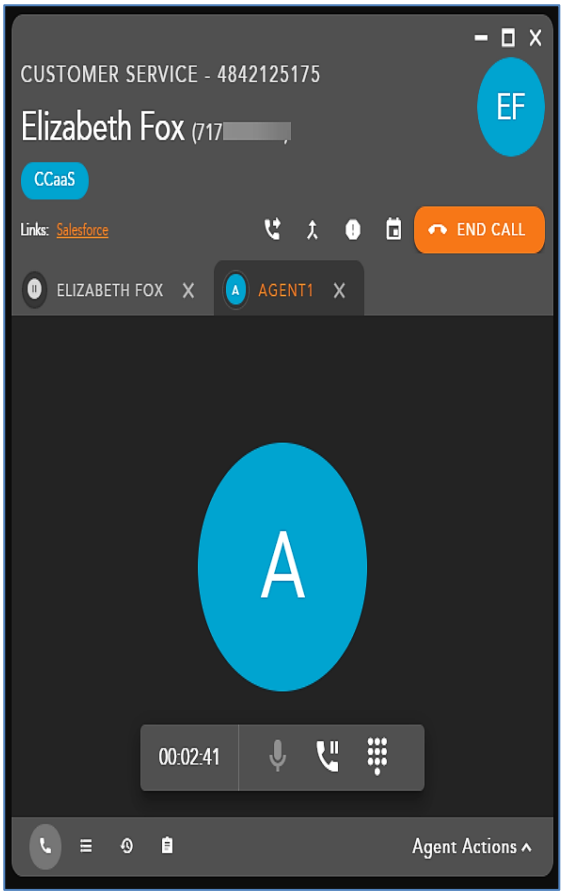
Select the arrow to initiate the conference.

**If initiating a Conference with an agent or supervisor they must be in a Ready or Handling Outgoing state. If you attempt to initiate a conference with a Busy agent or supervisor, you will receive an error message.*

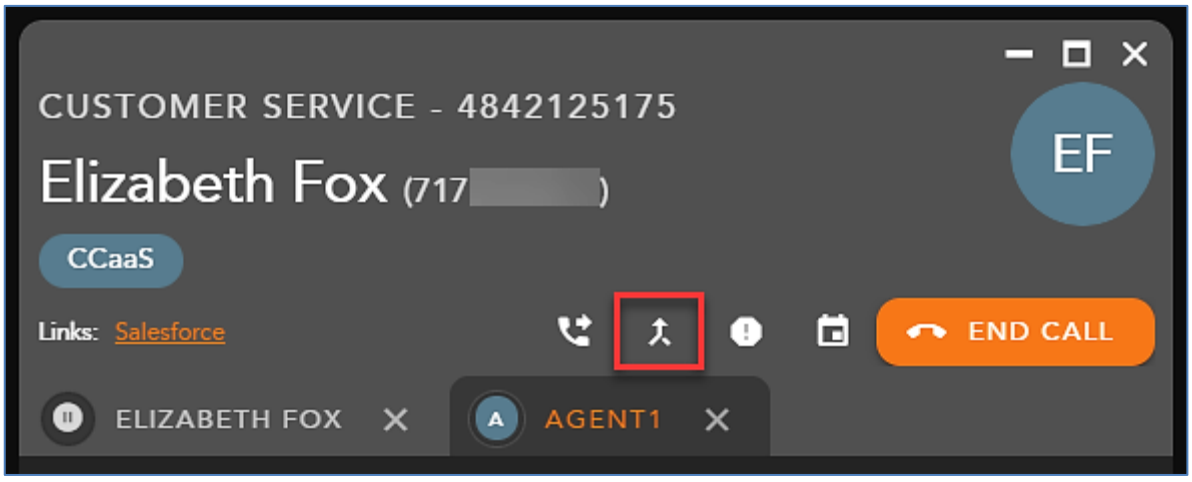
When the conference has been initiated, your call window will split into two tabs and the customer will immediately be put on hold. The first tab is the established conversation between you and the customer and will display the customer name or ID. The second tab is the initiated contact with the third party.

The second tab will initially show a waiting indicator until the end user accepts or declines the call.

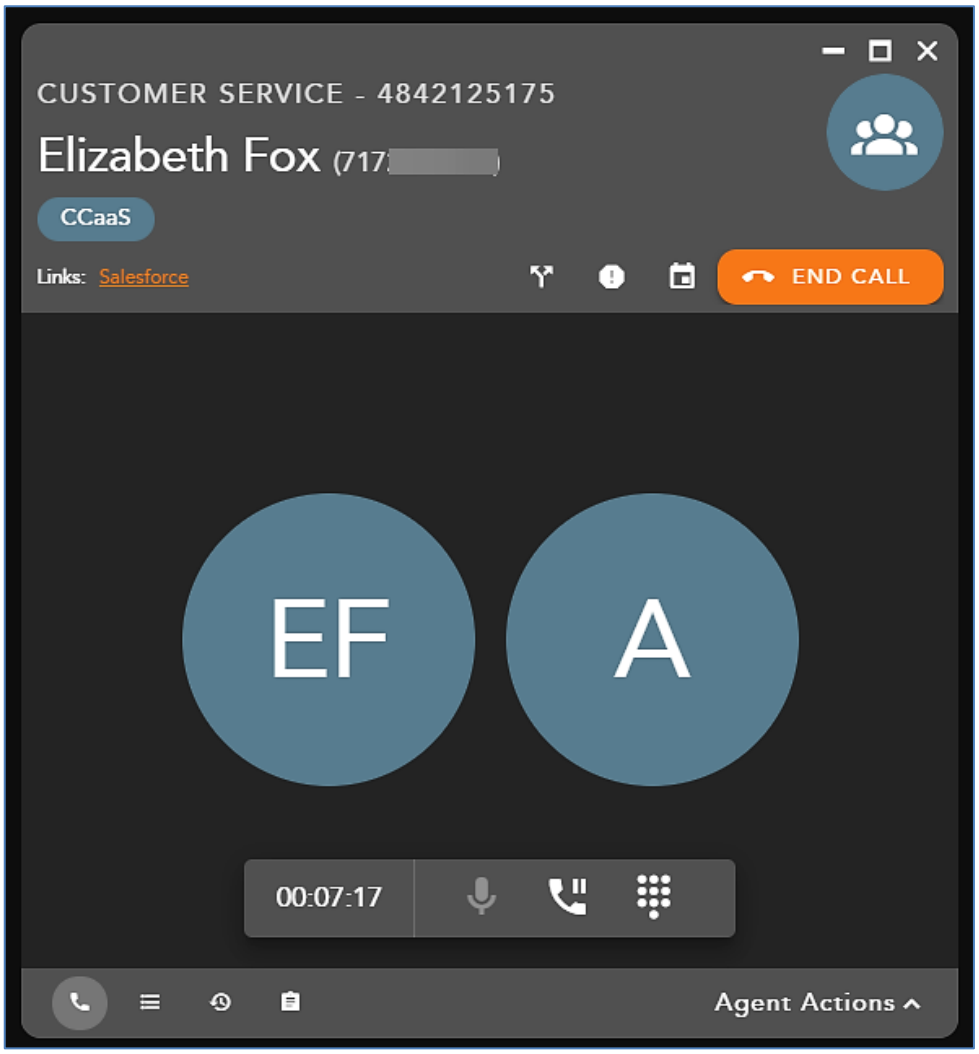




When you are ready to pull the third party into the call and begin a conference, select the Conference Icon found in between the two call tabs.



The tabs will merge into one call window indicating a successful conference and the customers avatar in the header of the interaction will change to indicate an active conference.

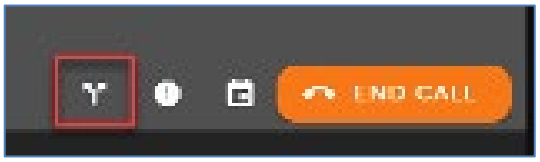


Ending a Conference

To end the conference and interaction, select

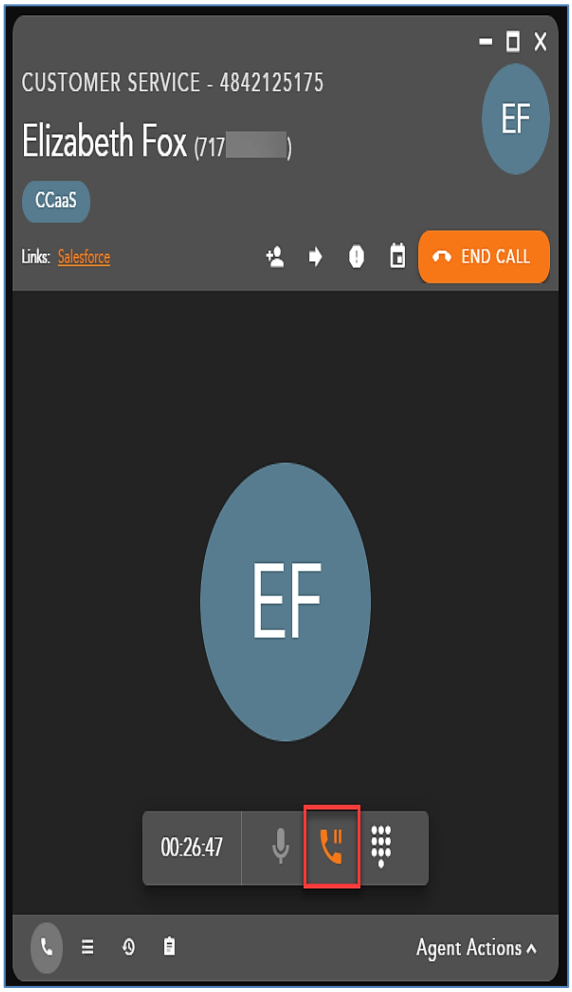
Splitting a Conference

To split the conference and resume the conversation with the customer, select the Split Conference icon



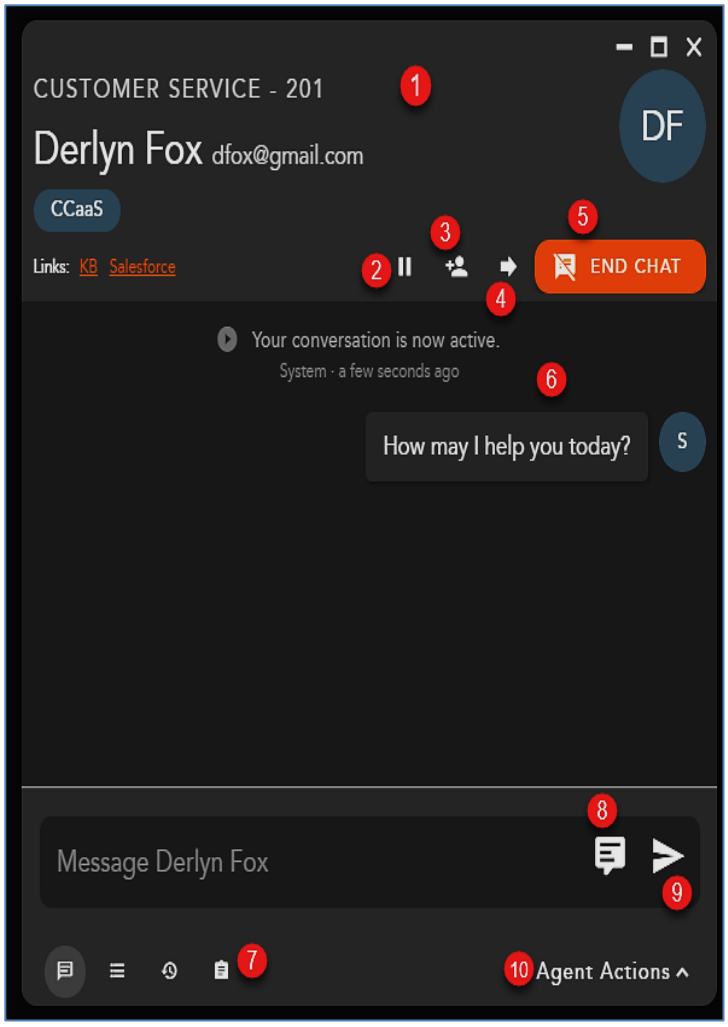
When Split Conference is selected, the conference will end and split the callers back into two separate calls and tabs within the interaction window.

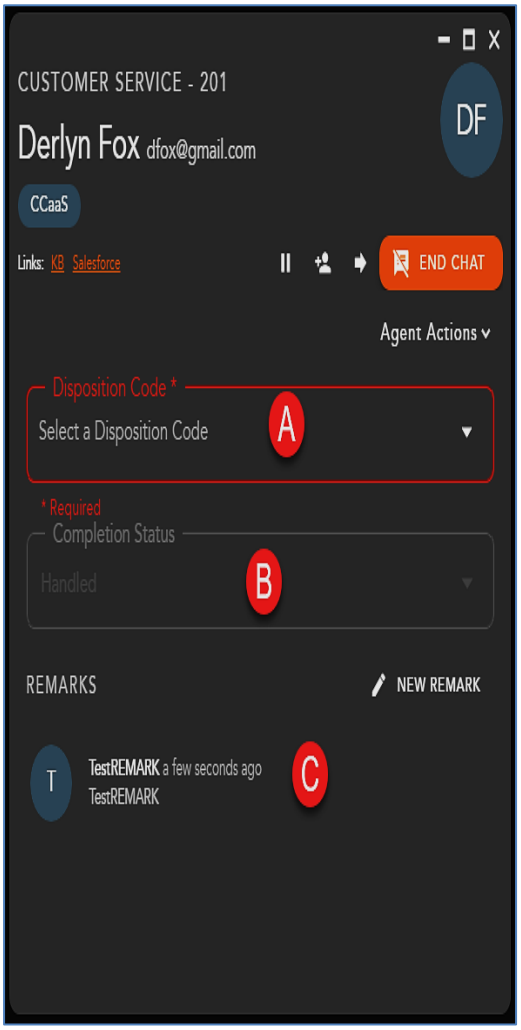
To end the call with the third party select the exit icon on the tab. When selected, the call will end and the tab will disappear. The original caller will remain on the line. Remove the caller from hold.



Handling Chat Interactions

Chat Interaction Interface





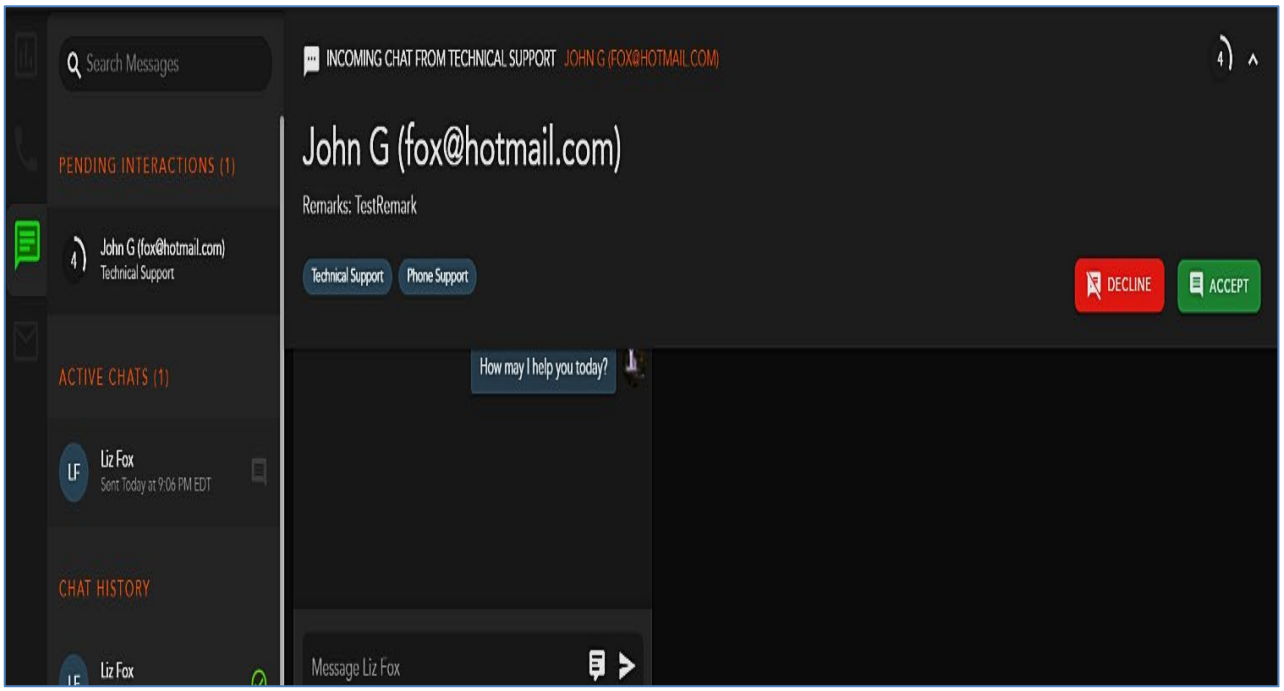
1. **Chat Interaction Header** - displays the following information:
    a. Originating Business Process
    b. Customer Name and Email Address
    c. Demand
    d. **External Links** - hyperlink to open to a URL configured in the Setup client. The links can integrate with a CRM or internal knowledge base, which contains specific information about a customer or help documents. By clicking on a link, you will be redirected to the predefined URL, providing more detailed information on the person they are working with or help documentation.

2. **Hold** - places a chat on hold
3. **Consult** - initiates a consulted transfer with another Agent, Supervisor or Business Process. Once the transfer has been initiated and accepted, the ability to start a conference will be available.
4. **Transfer** - initiates a blind transfer to another Agent, Supervisor or Business Process.
5. **End Chat** - ends the chat
6. Chat Session
7. **Interaction Footer** - contains the CRM information for the contact - Contacts, History and Notes/Remarks.
8. **Canned Responses** - pre-configured chat responses
9. **Message Window** - type and send replies to customers
10. **Agent Actions** - selecting agent actions will change the chat screen to show the following options:
    a. Disposition Code - pre-defined code to indicate the outcome of the interaction. These codes are specific to the Business Process and can be customized for each Business Process.
    b. Completion Status - explanation as to why the interaction ended. A status may be selected during or after an interaction. The completion statuses available will depend on the type of interaction handled
    c. Remarks - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks

Chat Panel

The chat panel displays your:

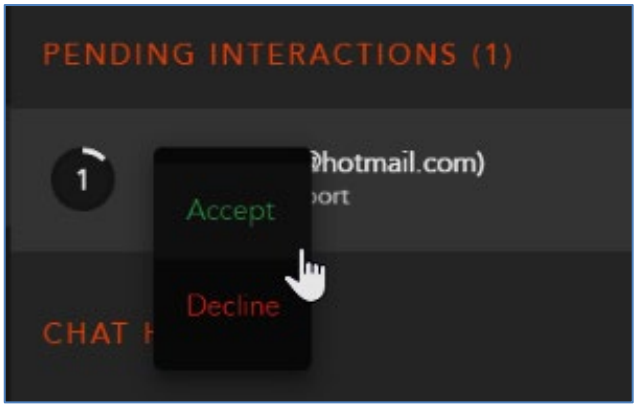
1. Pending Interactions
2. Active Chats
3. Chat History



Pending Chat Interactions

Within settings, agents can choose how they wish to display their incoming interactions: Banner & Panel, Banner only, or Panel only. If Banner & Panel or Panel is chosen, any incoming pending chat interaction will show up in the Chat panel. It will provide the No Answer Time Out countdown, Interaction Type and Originating Business Process, Name and Email address. If the agent chooses to only display incoming interactions through the Banner, the interaction panel will not display pending interactions.

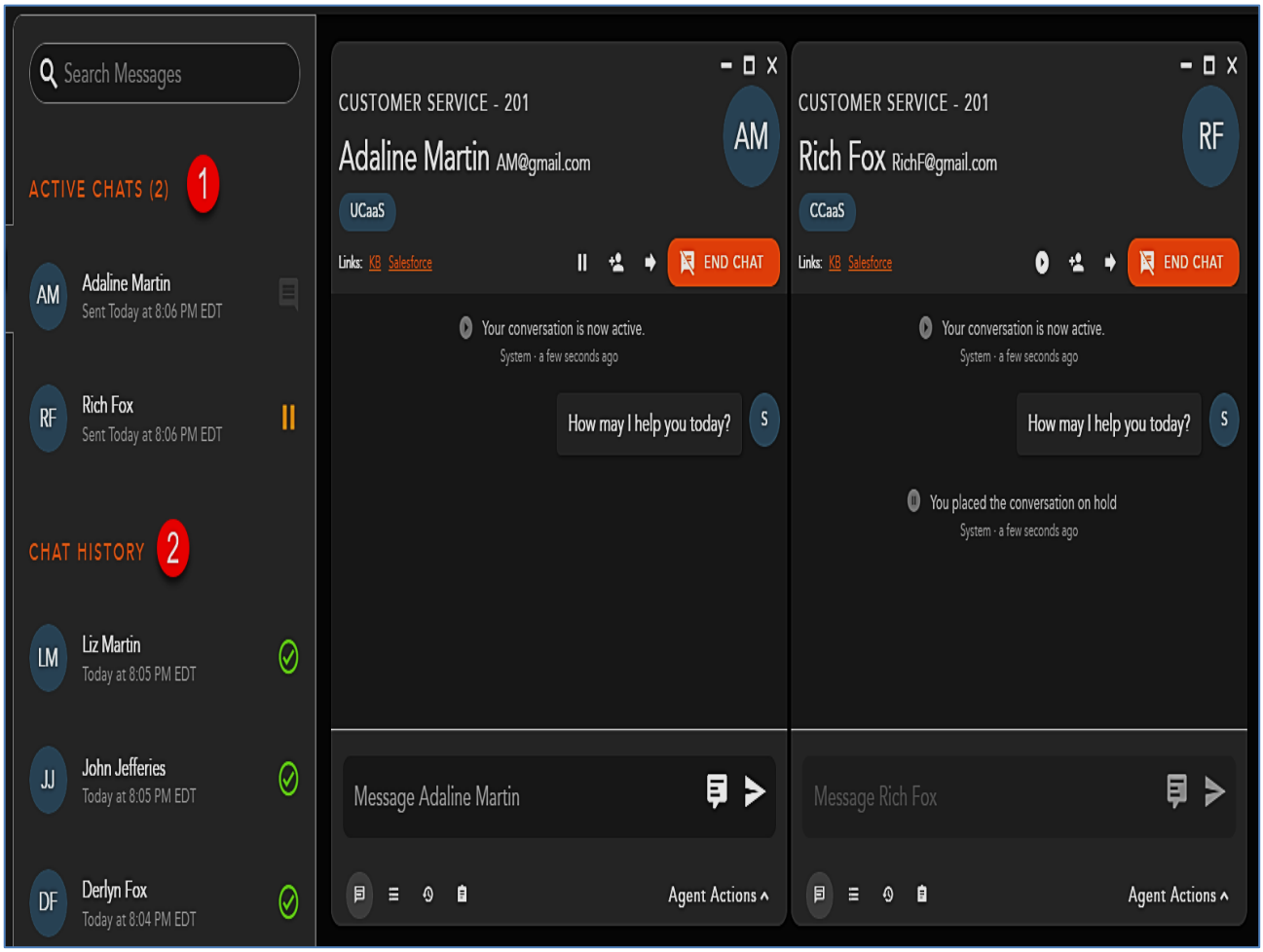
From the panel, right click on the pending chat interaction to accept or decline the interaction.

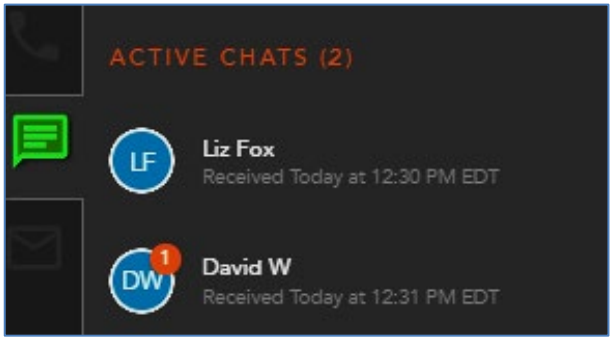


Active Chats

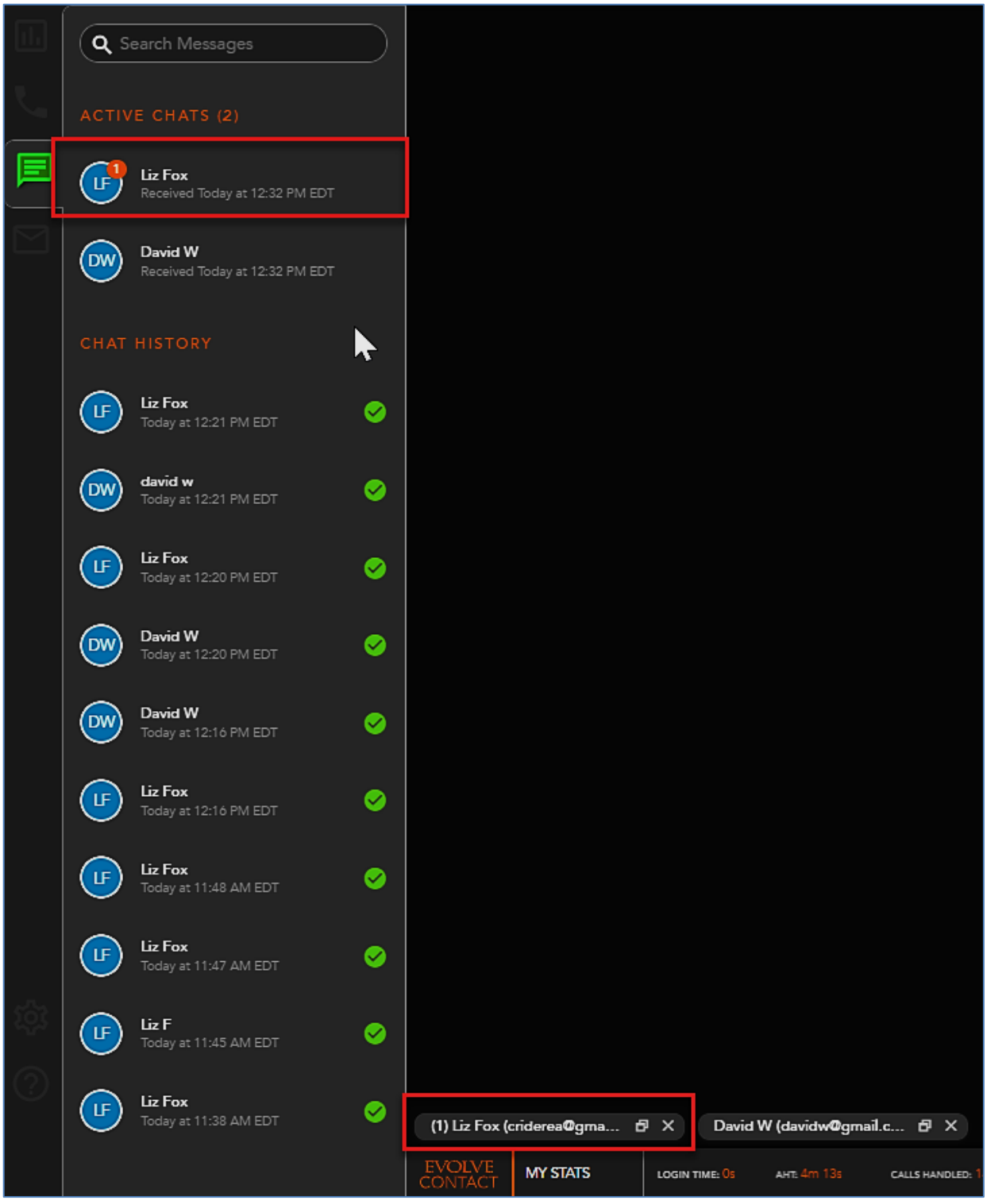
The Active Chat session displays all active chat interactions. Each active chat will display the name of the contact and the date and time the interaction was received.

When dealing with multiple chat sessions, you will be alerted within the panel when you have received a new message from a contact. The messages will increment each time a new message is received.

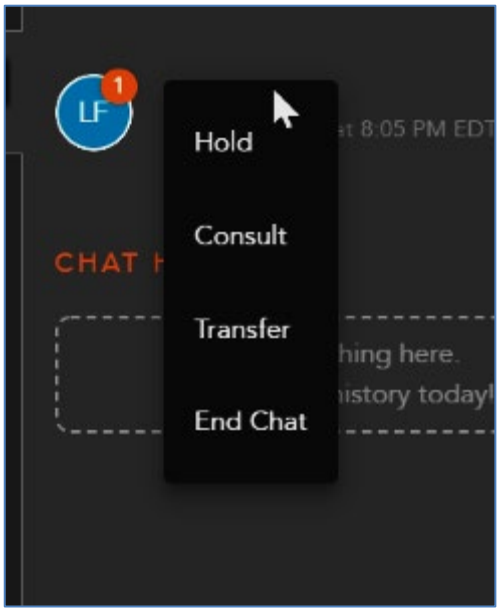




If a chat session is minimized, the panel will increment the number of messages received along with providing a visual alert of the waiting interaction to indicate you have new messages waiting.



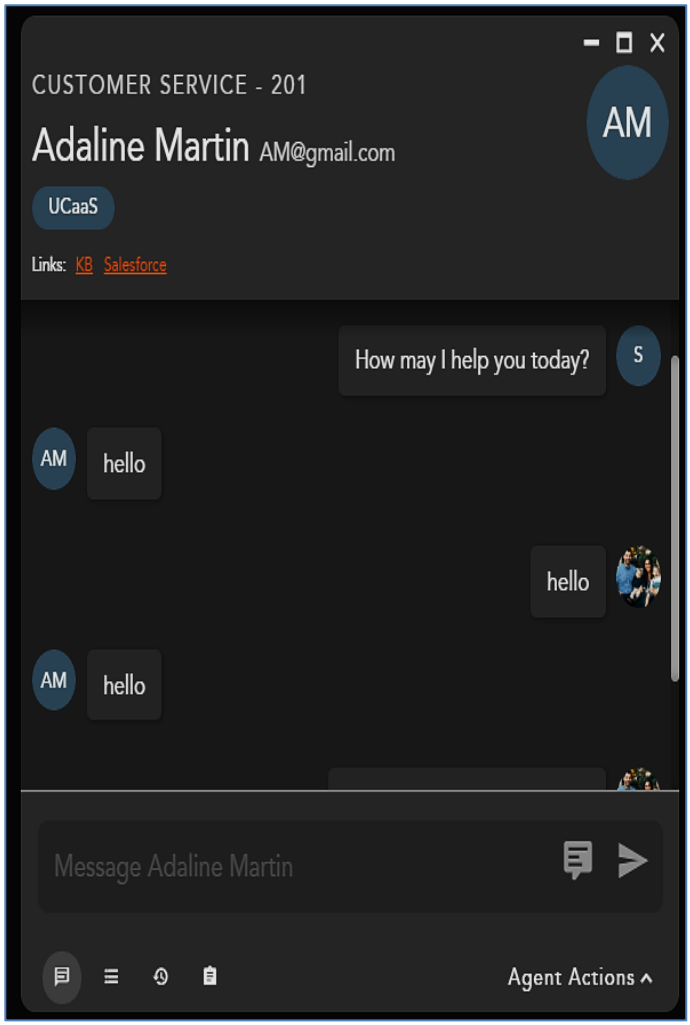
By right clicking on an active chat within the panel, you will have interaction control to put the chat on Hold, Consult, Transfer or End the chat. For more information on the different interaction controls, see the 'Interacting with a Chat Interaction' section.

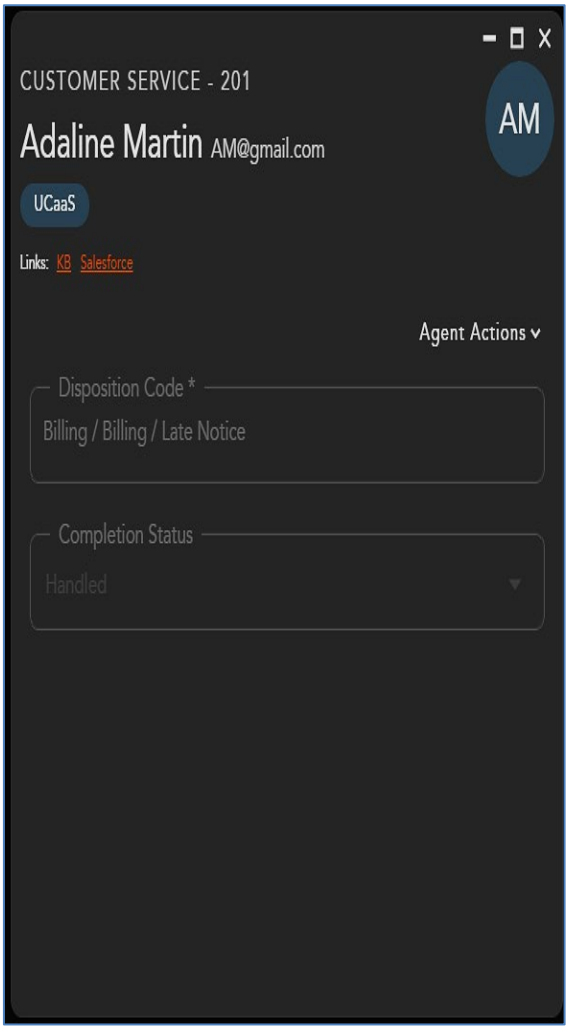


Chat History

Chat history will show all recent historical chat interactions, including the customer name, date, and time the interaction was handled.

Double click on an interaction to open the historical interaction and display the chat history and completion status and disposition code applied to the interaction.





Chat Interaction

Accepting a Chat Interaction

When a new chat interaction is being offered to an agent the following information will be present for review before accepting the interaction:

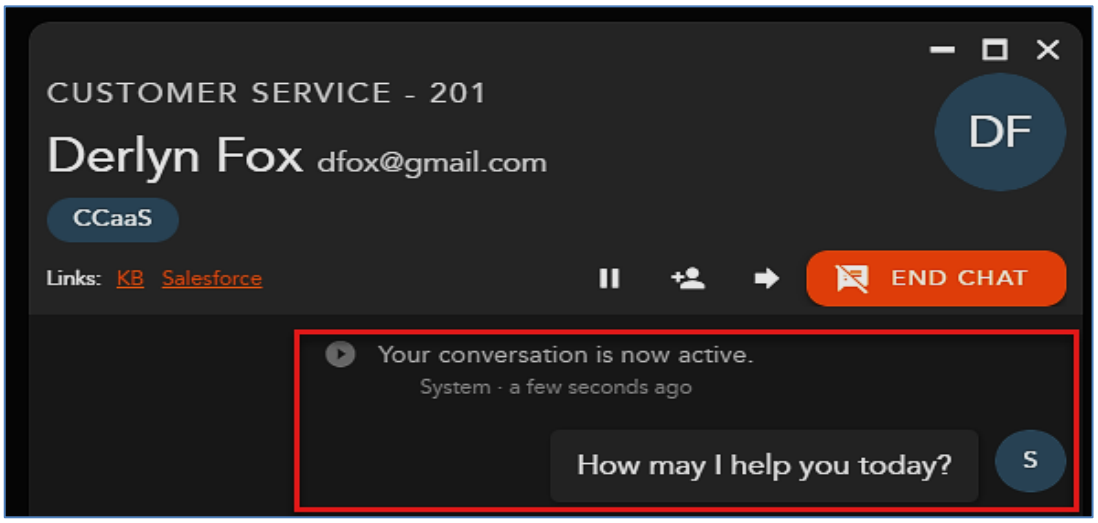
1. The Interaction Type Originating Business Process
2. Customer Name and Email Address
3. **Interaction Handling Remarks** - prepopulated through the Interaction Handling Flow configured in the Setup client. If no remarks are present for the interaction this field will not be visible on the interaction.
4. **Demands** - specific demands assigned to the interaction via the handling flow and utilized to assign the interaction to the appropriate agent
5. **No Answer Time Out** - preconfigured in the Setup Client. If the interaction is not answered within this timer, you will be put into a No Answer State.

To accept and reply to the incoming chat, select the **[Accept]** icon

To decline the interaction and send the interaction back to queue, select the **[Decline]** icon. Note, if you are the only ready agent in the Business Process, the interaction will continue to present itself until accepted or another agent becomes ready.

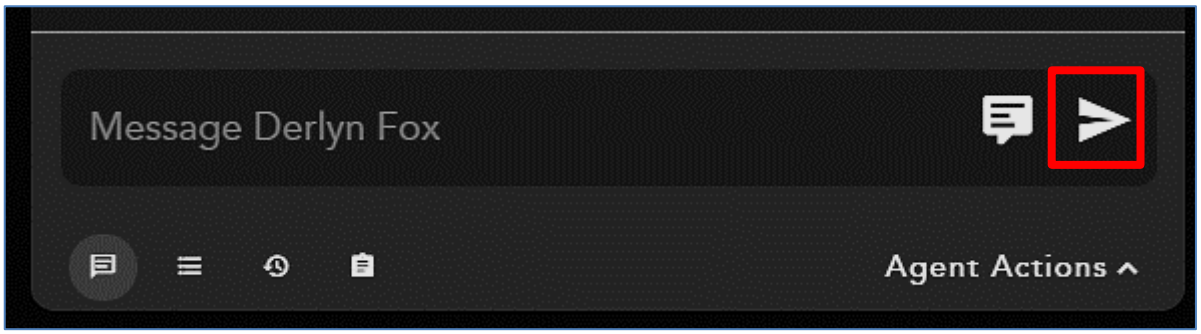
Responding to a Chat

Once an interaction has been accepted, the system will send an automatic reply to the customer indicating that their chat has been received by an agent.

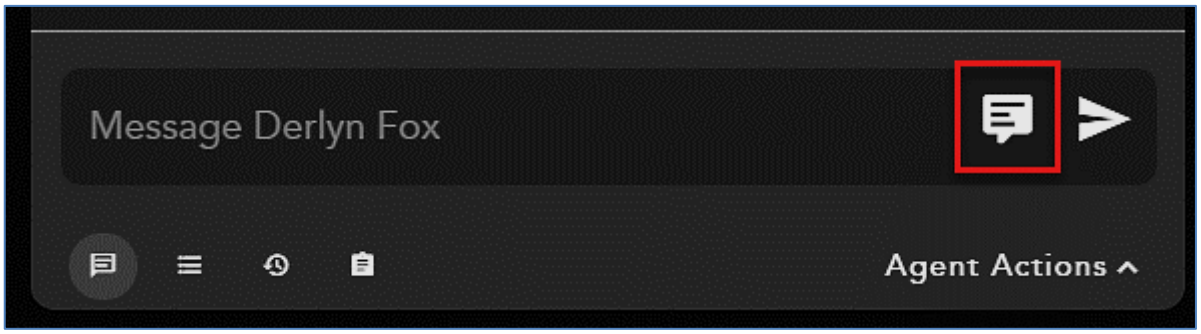


To send a message, you can:

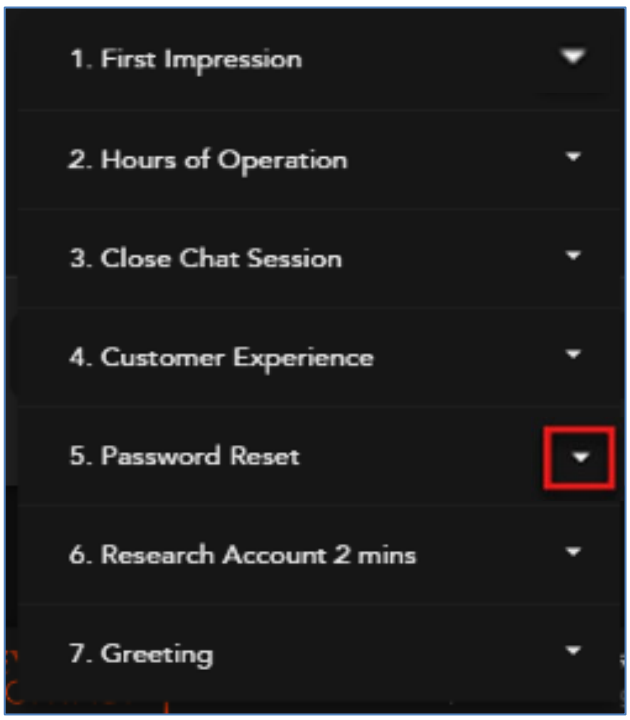
1. Type within the message window and then,
    a. Select the **send arrow** or *press the enter key* on your keyboard to send the message.

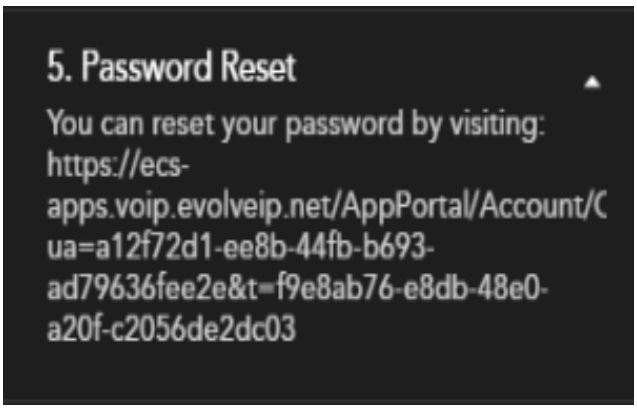


2. Utilize a Canned Response.
    a. Click on the **Note** icon to display the list of canned responses.

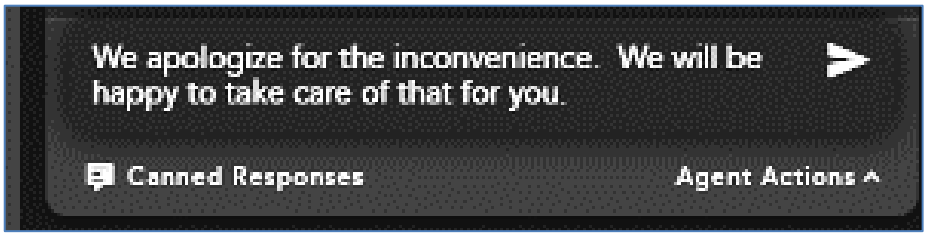


    b. The list of available response is shown, click the arrow to the right of title to preview the response description.





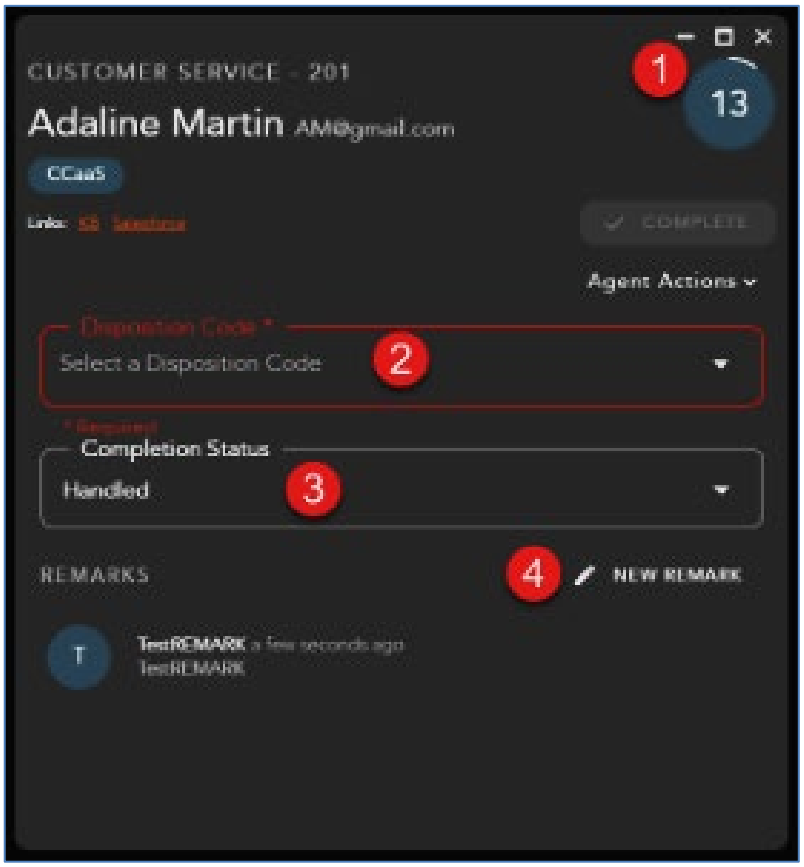
Once a response has been selected, it will appear in the message window to allow for edits before sending to the contact. **Note**: you can add multiple canned responses at one time.



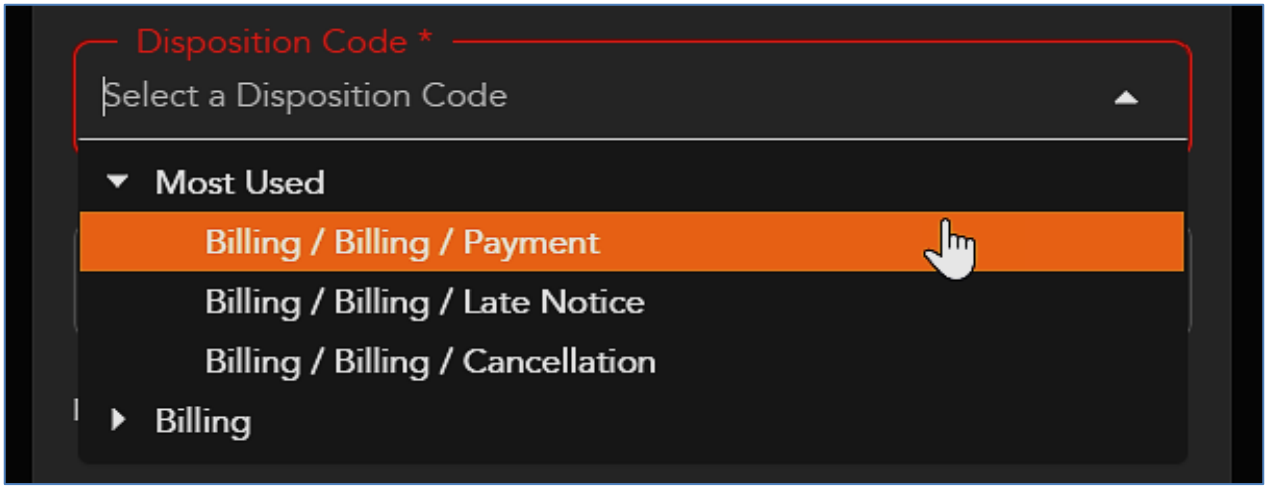
Complete an Interaction

To end a chat interaction, select **End Chat.** Ending the chat will end the interaction with the customer and automatically put you in a wrap-up state if wrap-up has been pre-configured in the Setup Client. If no wrap-up has been configured, you will automatically be put back into a Ready state.

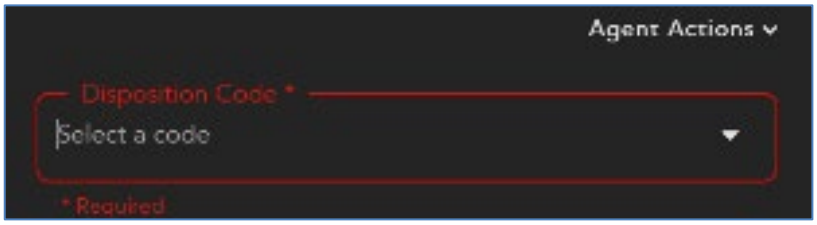
If Wrap-up has been configured, the following options will be available to complete the interaction:



1. **Wrap-up Timer** - counts down the amount of time left in wrap-up
2. **Disposition Code** - apply a disposition code to the interaction. If no disposition codes have been configured for the originating Business Process this option will not be available. By default, your three most used disposition codes for the originating Business Process will be at the top of the disposition drop down, followed by all disposition code categories and subcategories. If the disposition code is mandatory, that option will appear in red. You must select a disposition code before you can complete the interaction.

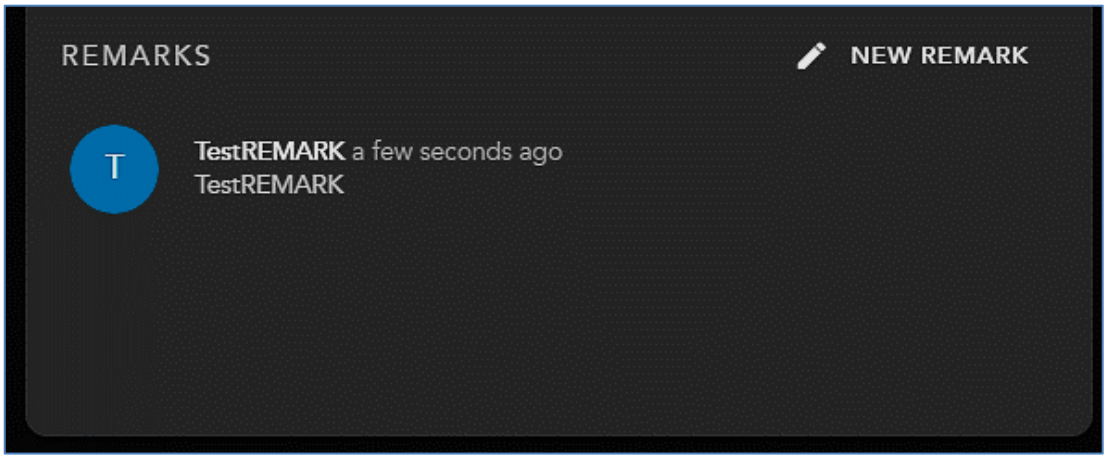


   a. If the disposition code is mandatory, that option will appear in red. You must select a disposition code before you can complete the interaction.

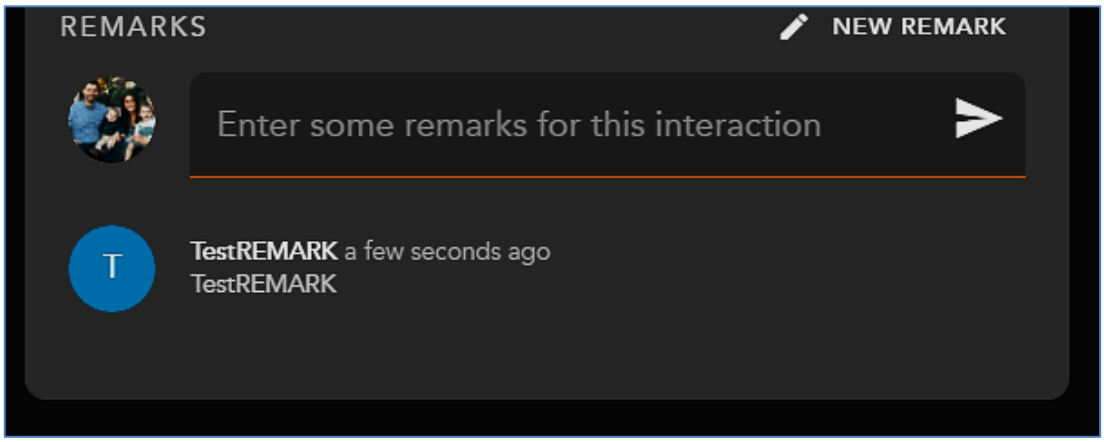


3. **Completion Status** - end result of the interaction. The completion statuses available will depend on the type of interaction handled.
   a. Handled - default value for completed interactions. The interaction was completed and handled.
   b. Delegate to Supervisor - this option is only available if enabled for agents in the Setup Client. Once a call has ended, agents can delegate a call to a supervisor with remarks attached providing an explanation as to why the interaction has been delegated to a supervisor

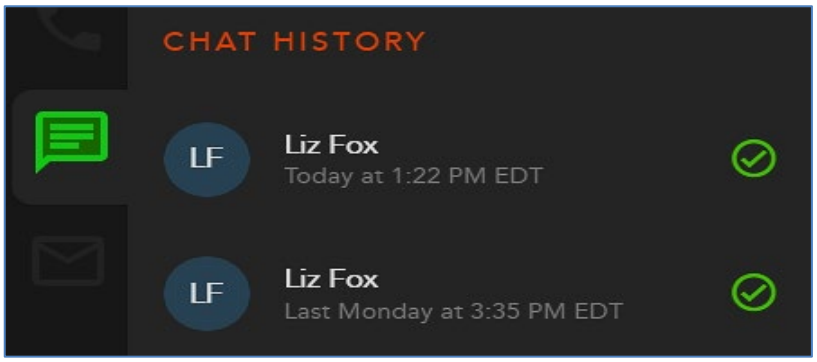
4. **Remarks** - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks.



To add a new remark to the interaction select **[New Remark]**. Once selected the remarks field will open to add a new remark.



Once you have filled in the required fields select **[Complete]**. This will complete the interaction and put you back into a Ready state. If you do not manually select complete and wrap up is configured, the interaction will complete automatically after the wrap-up period has ended. Once an interaction has completed, it will appear under your chat history within the Interaction Panel.

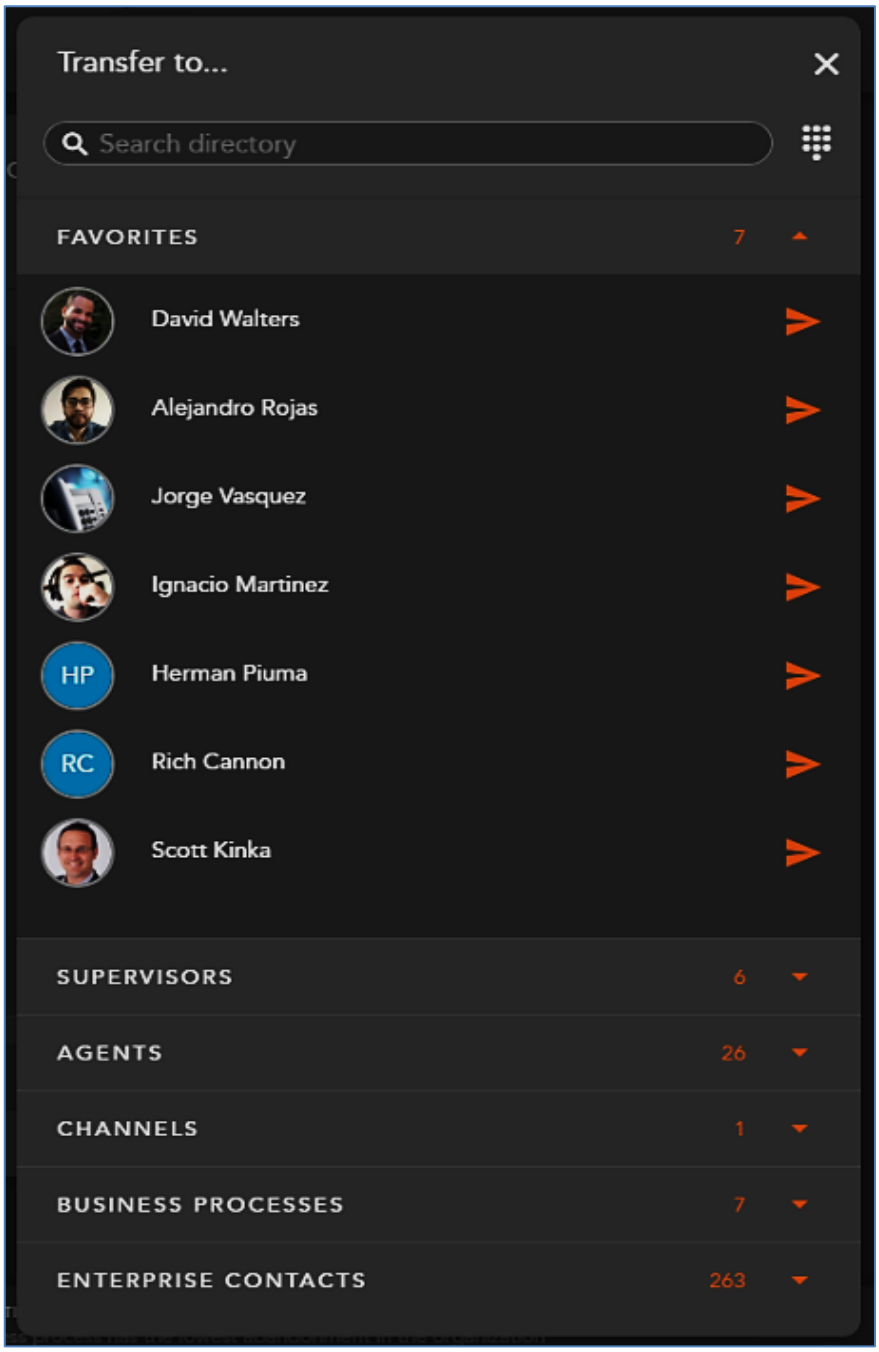


Transferring a Chat

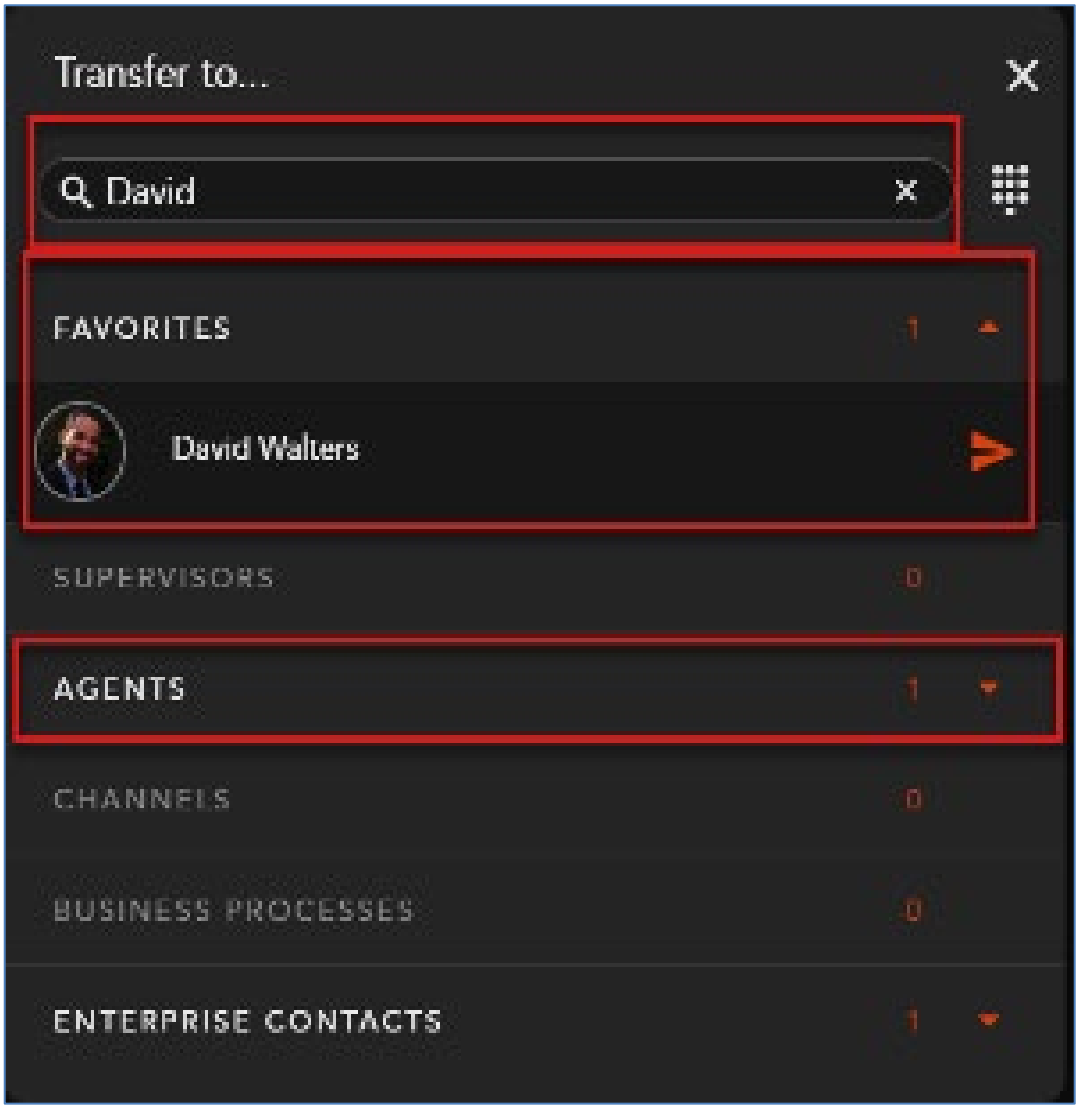
Blind Transfer

To transfer a chat to another Agent, Supervisor, Business Process, or Channel, select the **Transfer Icon** within the chat window.

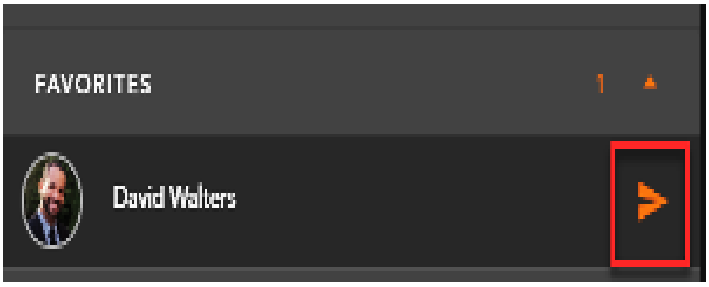
The Transfer window will open; by default your favorites will be expanded.



Within the search bar you can type the name of the Agent, Business Process, or Channel you wish to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.



Select the *transfer arrow* to complete the blind transfer.



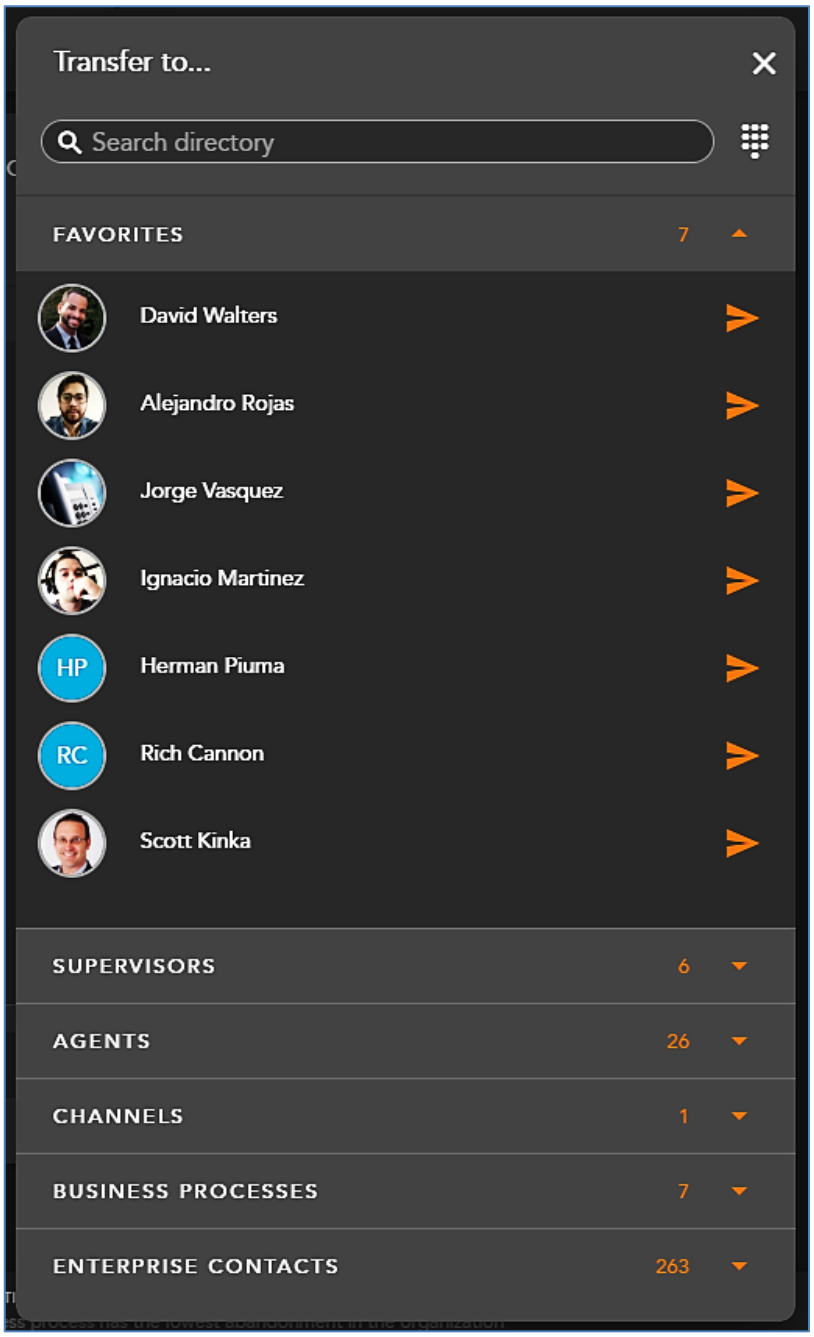
Once a contact has been selected, the interaction will disappear and you will receive a successful transfer message.

Note: If the contact is in a busy or offline state you will be unable to transfer the interaction. Attempting to transfer to an unavailable contact will result in an error message.

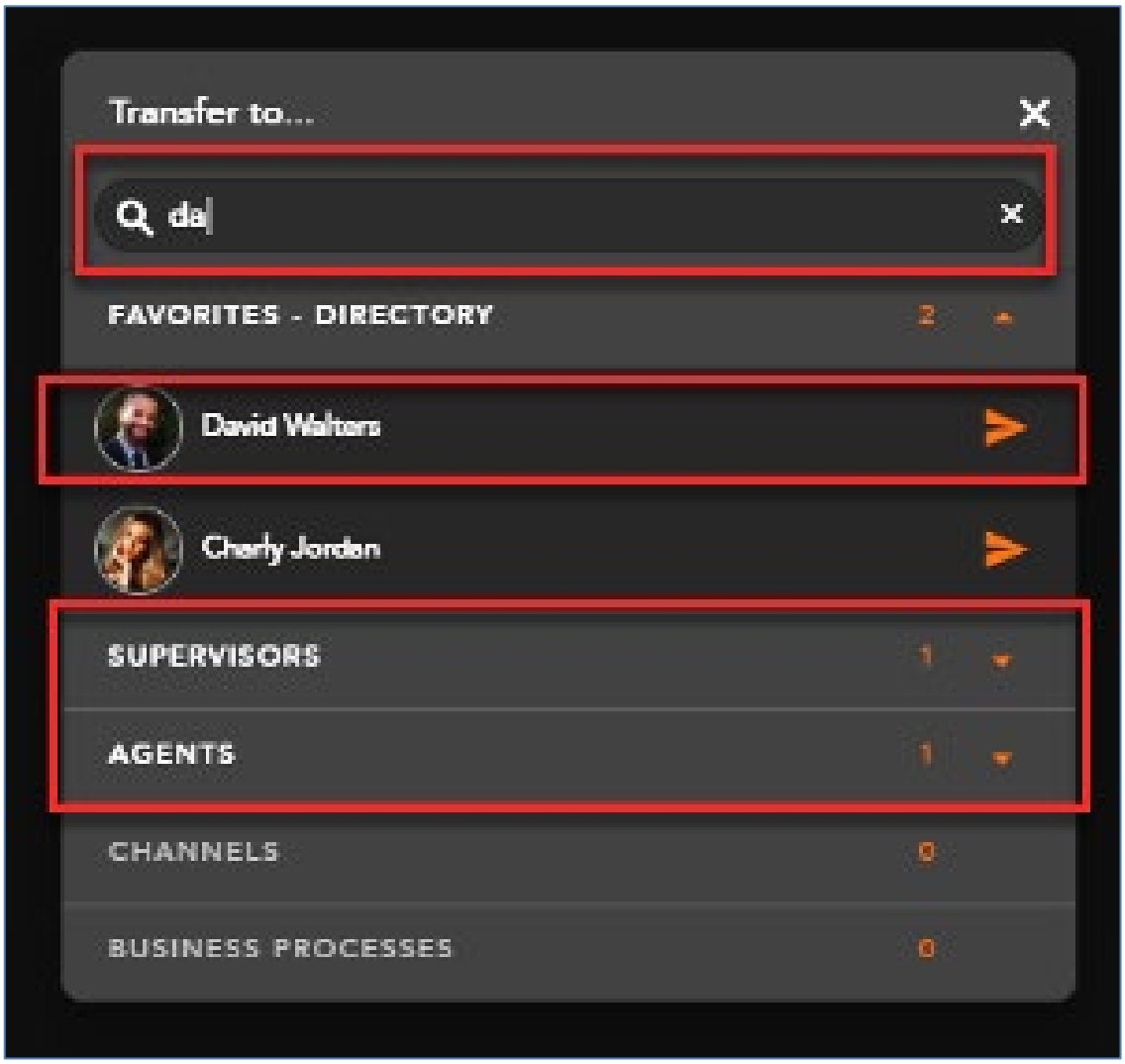
Consulted Transfer

To perform a consulted transfer to another Agent, Supervisor, Business Process, or Channel; select the **Consult Icon** within the chat window.

The Transfer window will open; by default your favorites will be expanded.



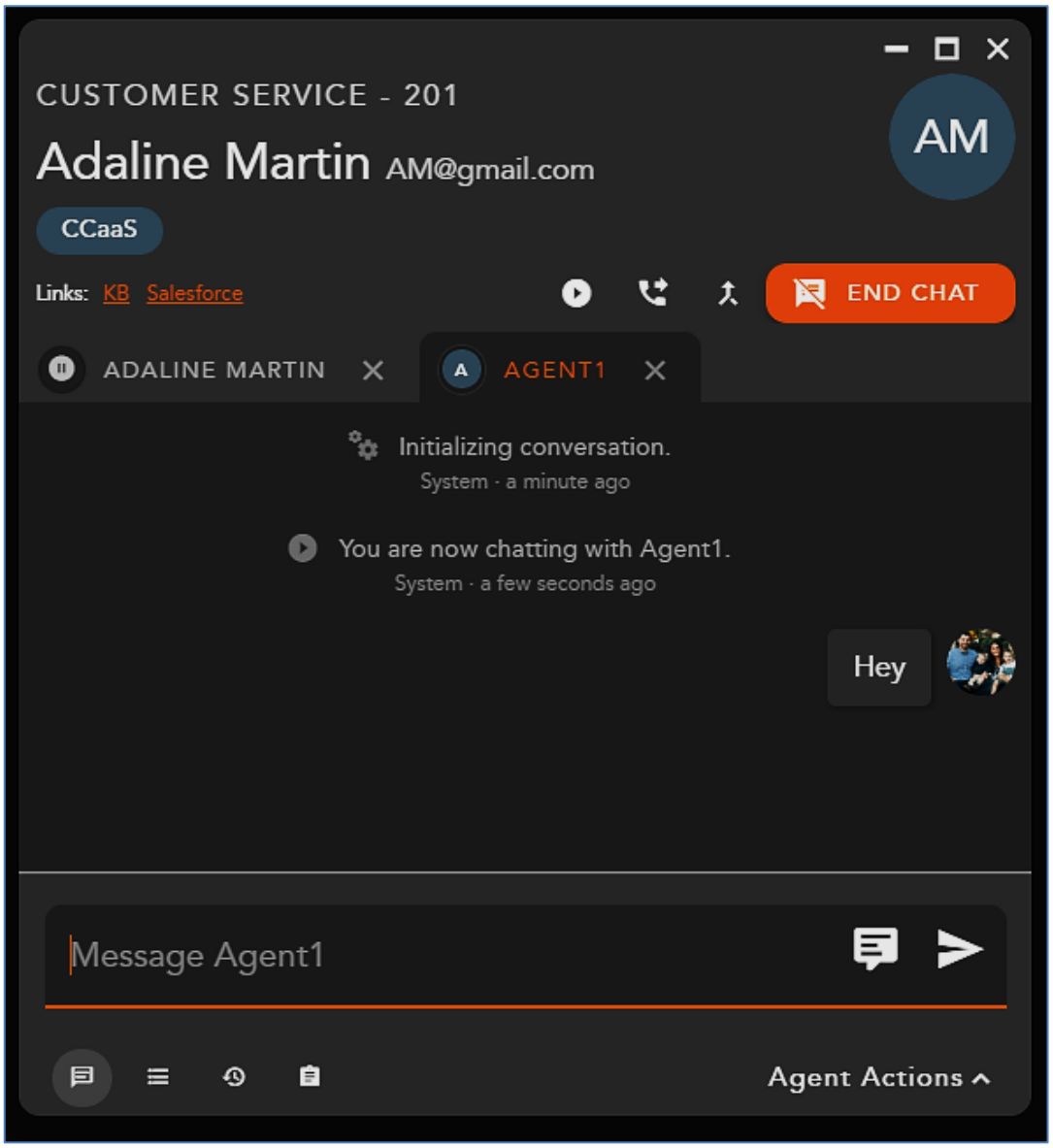
Within the search bar you can type the name or the User, Business Process, or Channel you wish to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.



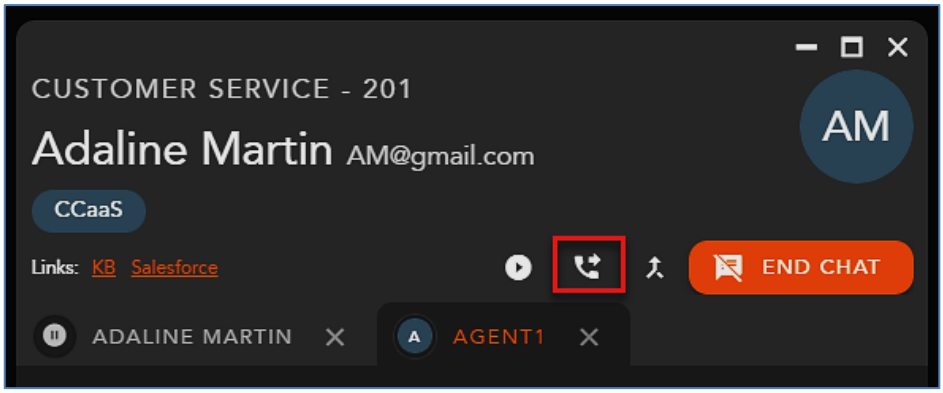
Select the *transfer arrow* to initiate the consulted transfer.

Your chat window will split into two tabs. The first tab is the conversation between you and the customer. The second tab is the initiated consult between you and the Agent, Supervisor, Business Process, or Channel.

The chat window will provide a confirmation message when the consulted contact has accepted your chat.

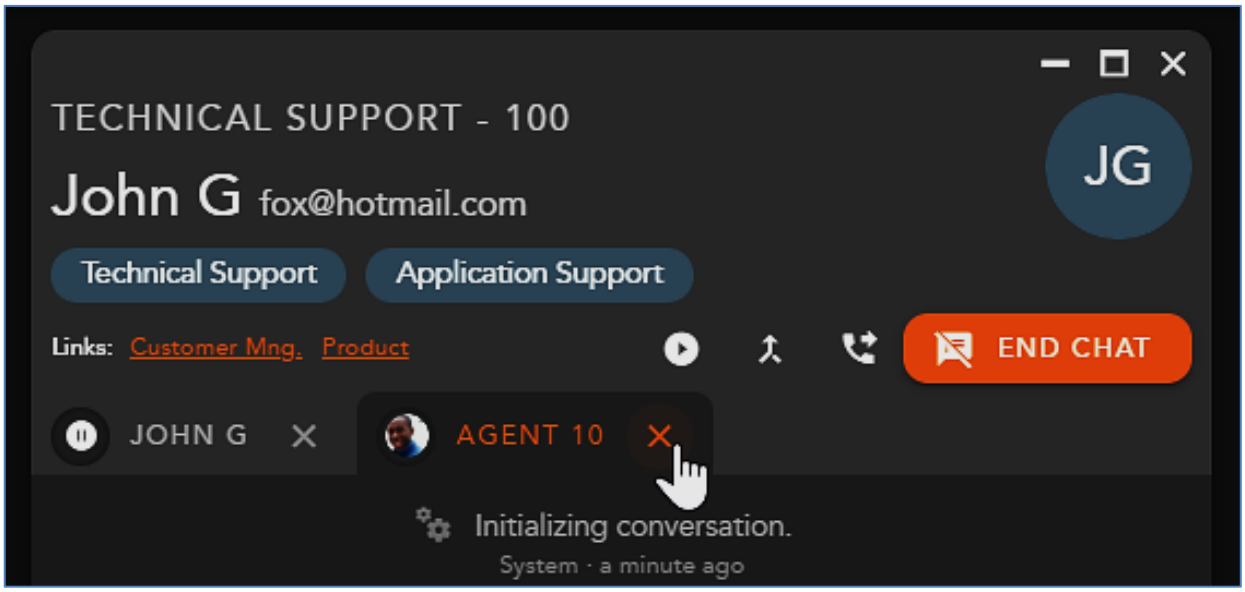


To complete the consulted transfer select the **transfer icon**.

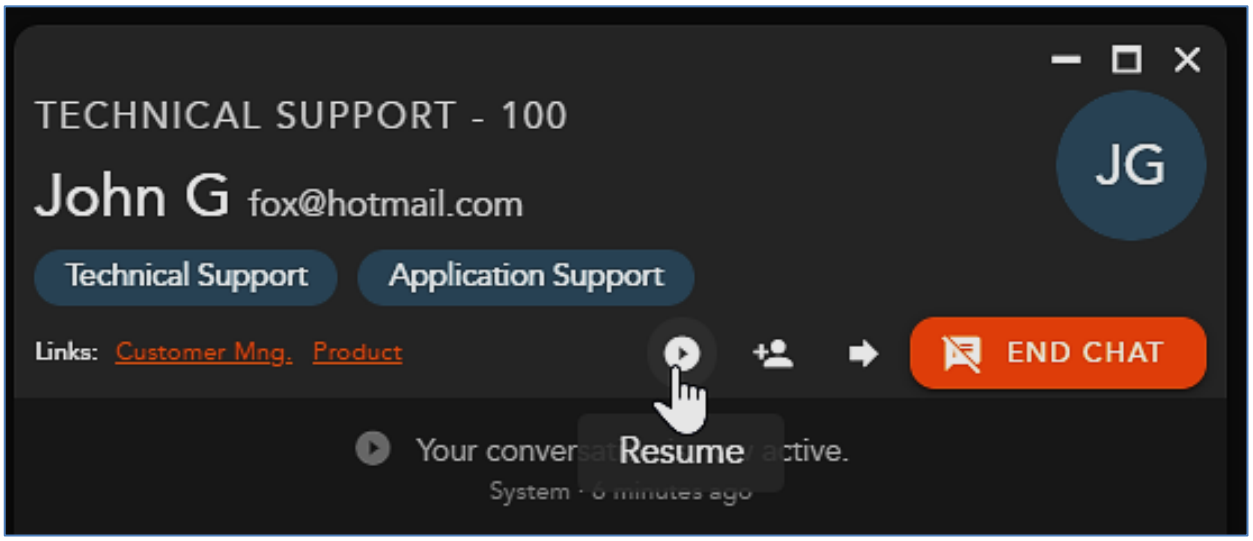


The interaction window will disappear followed by a **transfer success message**.

To cancel the consulted transfer select the **X** in the tab of the consulted party.



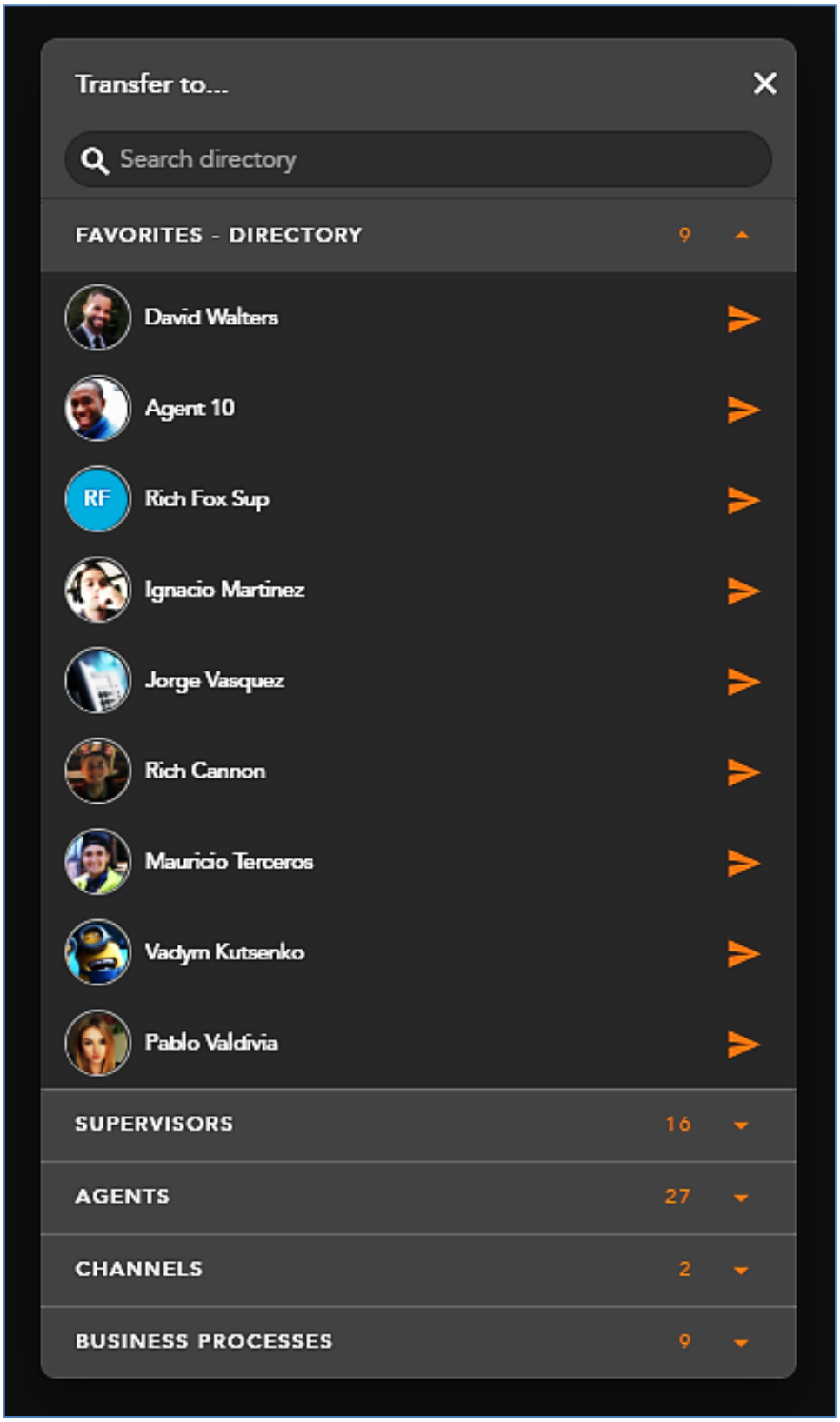
This will end the consult and return to the original chat interaction. The message window with be grayed out and you will be unable to type a response until you have selected the **resume icon** to continue the chat interaction.



Initiate a Conference

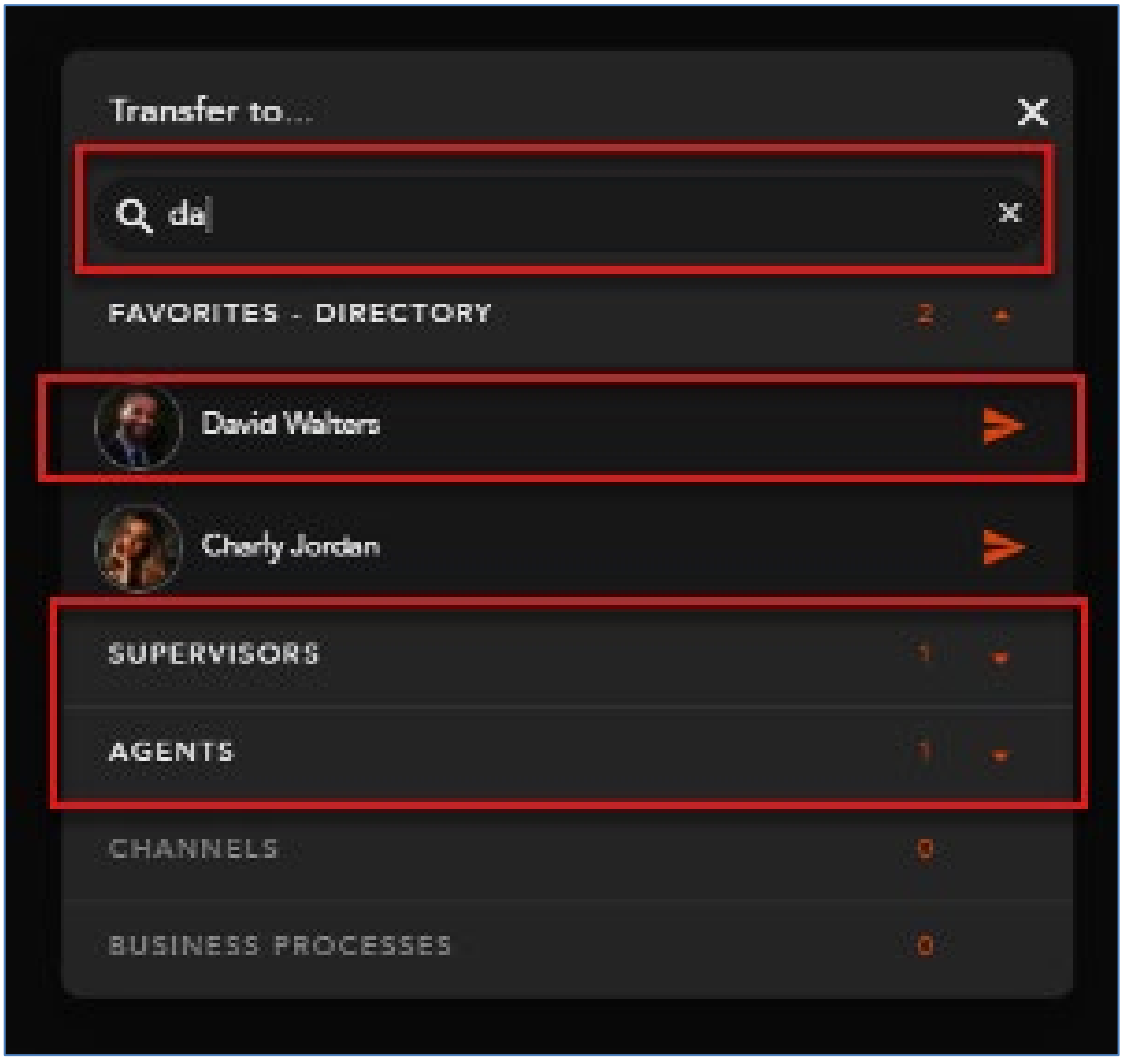
To conference in another Agent or Supervisor into the chat select the **Consult Icon** within the chat window.

The contacts window will open; by default your favorites will be expanded.


Transfer to...
Search directory
FAVORITES - DIRECTORY 9
David Walters
Agent 10
RF
Rich Fox Sup
Ignacio Martinez
Jorge Vasquez
Rich Cannon
Mauricio Terceros
Vadym Kutsenko
Pablo Valdivia
SUPERVISORS 16
AGENTS 27
CHANNELS 2
BUSINESS PROCESSES 9

Within the search bar you can type the name of the Agent, Business Process or Supervisor you wish to initiate a conference. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.

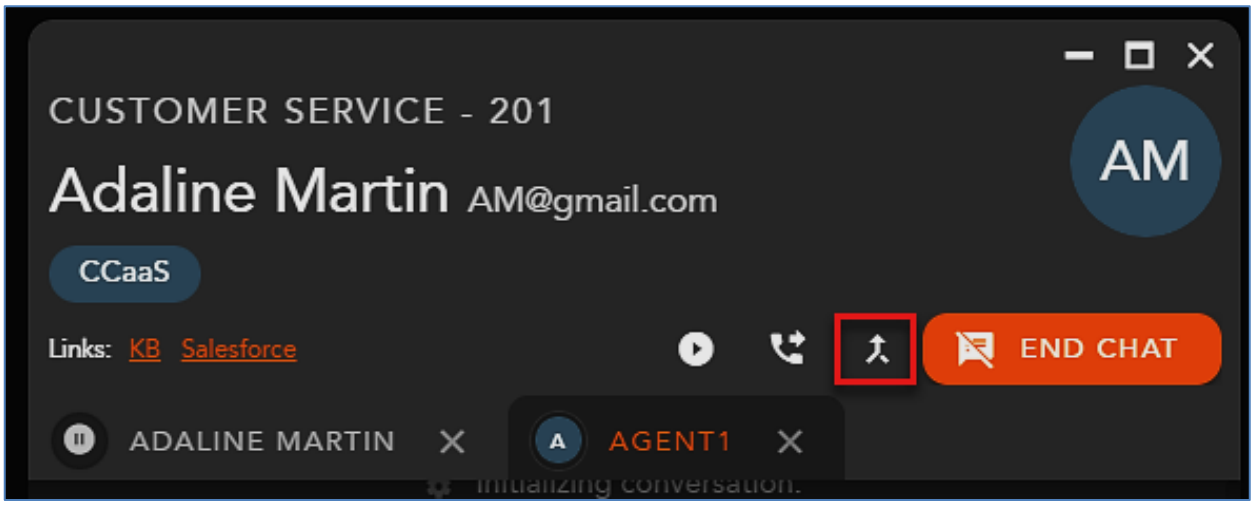
*If initiating a Conference with an agent or supervisor they must be in a Ready or Handling Outgoing state. If you attempt to initiate a conference with a Busy agent or supervisor, you will receive an error message.



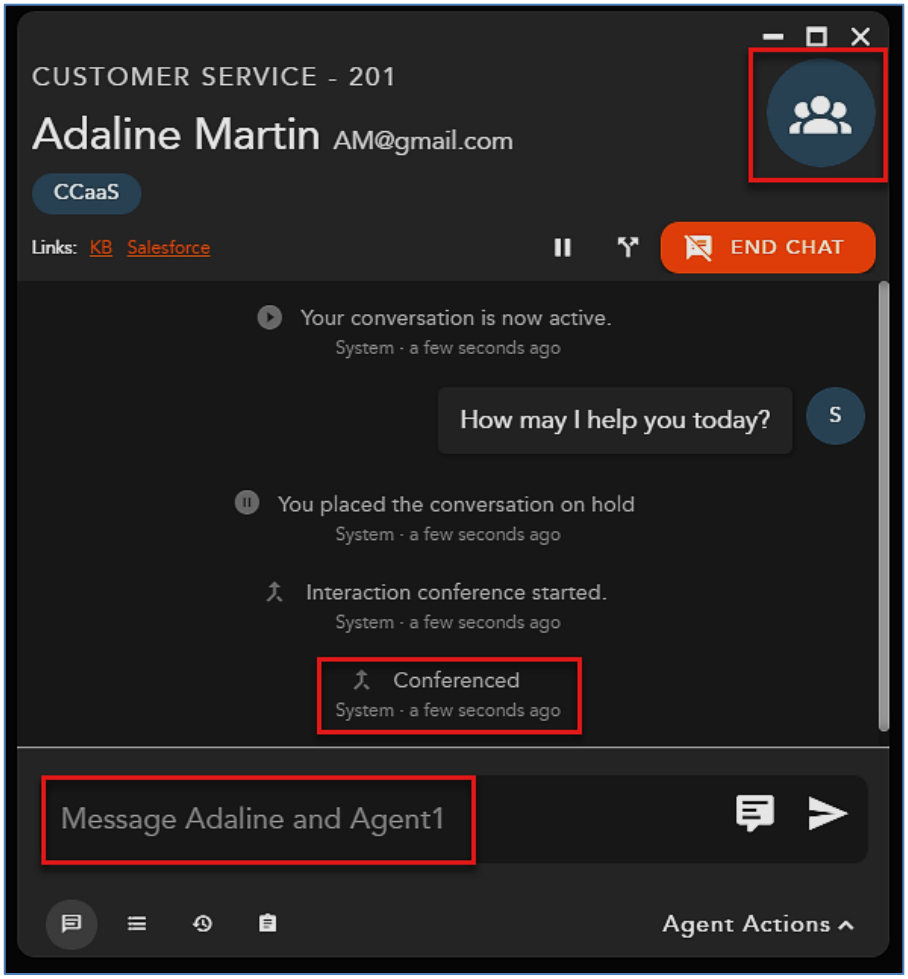
Select the *arrow* to the right to initiate the conference.

Your chat window will split into two tabs. The first tab is the conversation between you and the customer. The second tab is the initiated conference between you and the Agent, Supervisor, or Business Process. The chat window will provide a confirmation message when the contact has accepted your chat.

When you are ready to pull the third party into the chat and begin a conference, select the **Conference Icon** found in the Interaction Toolbar.

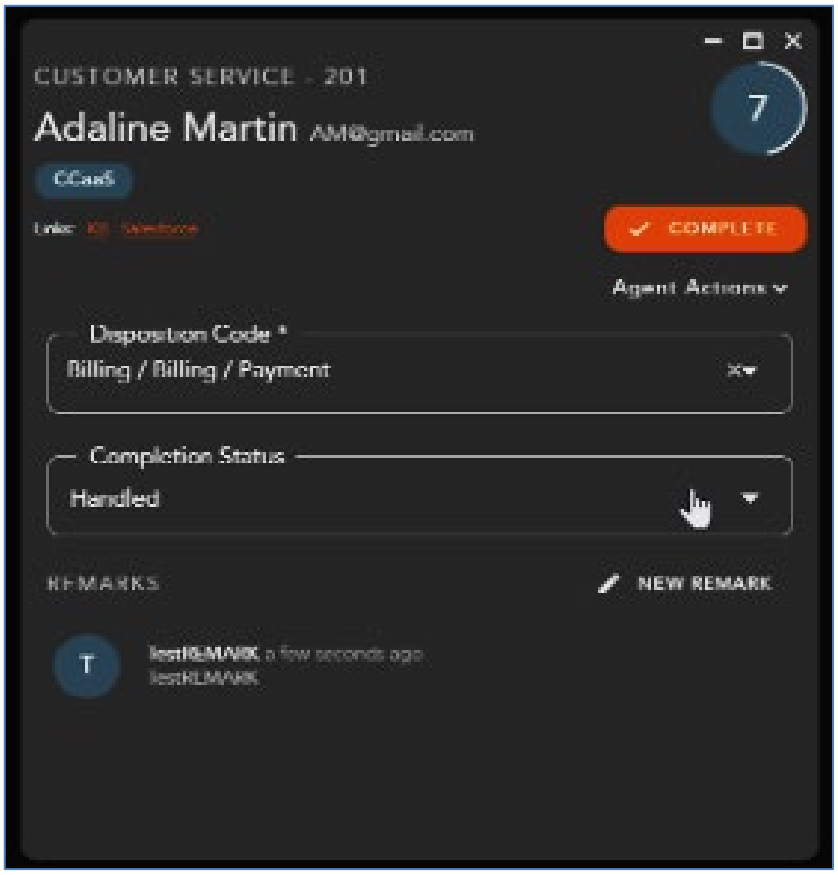


The two tabs will be merged into a single window. The message window will update to say *conferenced* to indicate a successful 3-way chat conference. The customers avatar will also change to indicate you are currently in a conference.



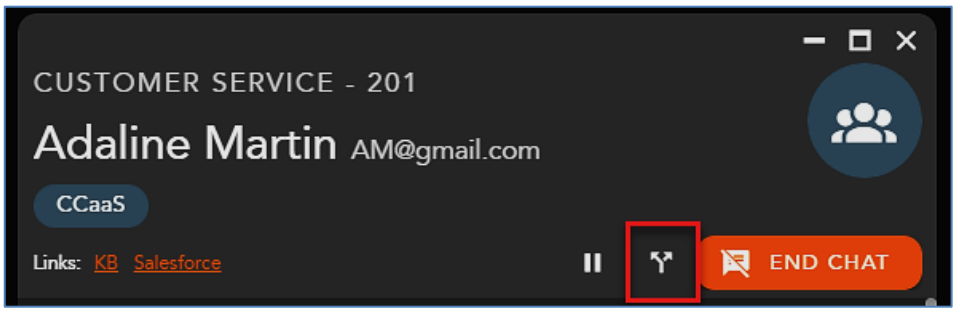
End a Conference

To end the conference and complete the interaction select **[End Chat]**. The interaction will end and all parties will be disconnected from the interactions. The Agent Actions will open to add a Disposition Code and Remarks, select Complete when ready to complete the interaction.

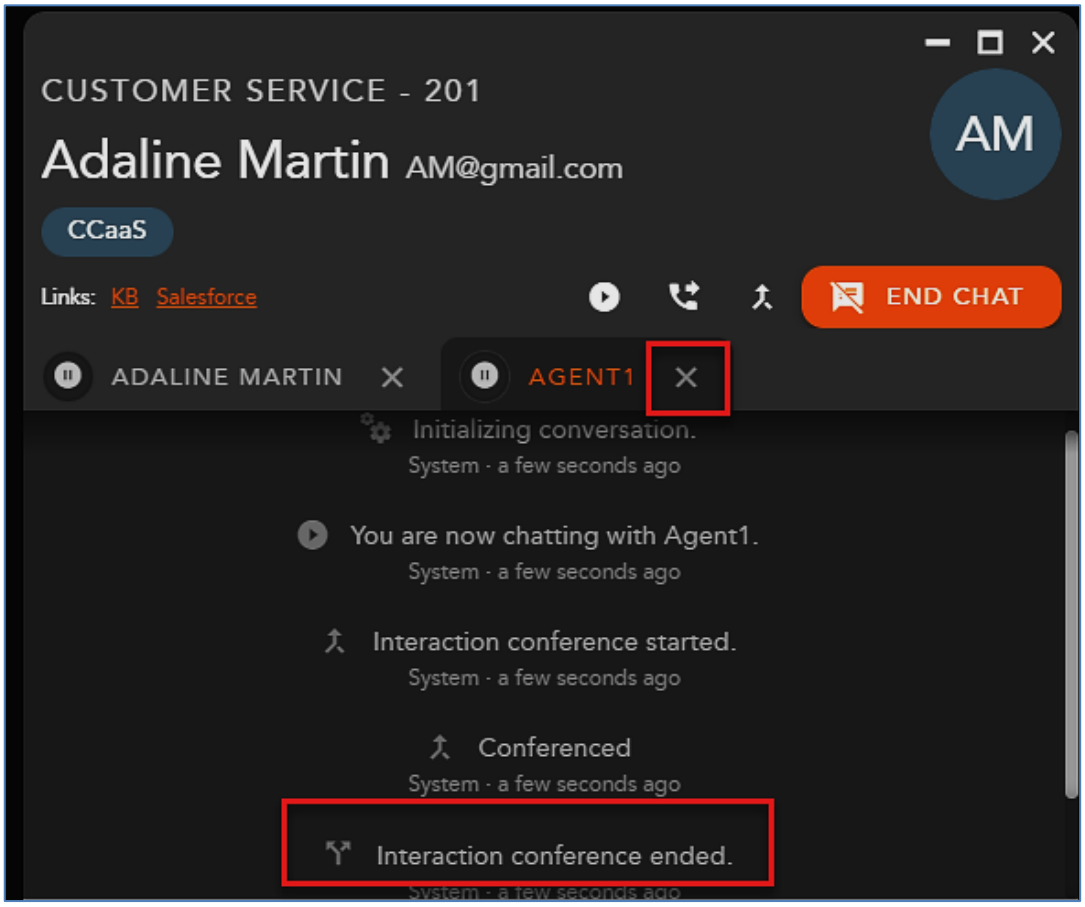


Split a Conference and Remove Consulted Party

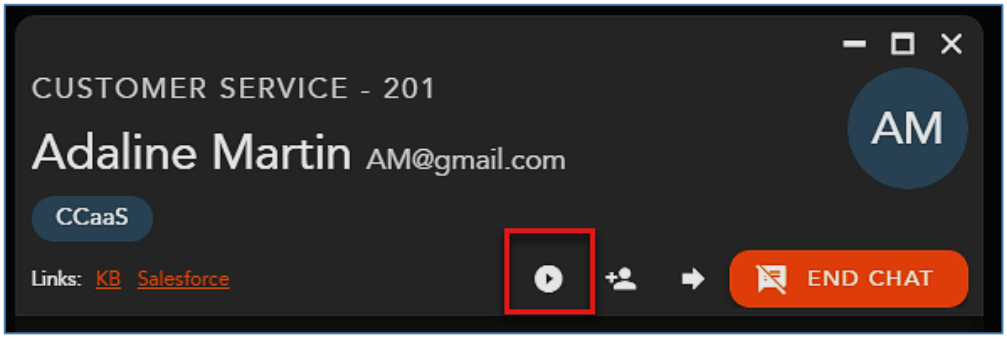
To end a conference and split it back into two separate interactions, select the **Split Conference icon**.



The chat window will split back into two chat tabs and a confirmation message that will display *"Interaction Conference Ended"* will show in the chat window. The first tab is the interaction between the customer and the agent and the second tab is the interaction between the agent and the consulted party. To remove the consulted party and resume the interaction with the customer, select the **X** icon on the tab.

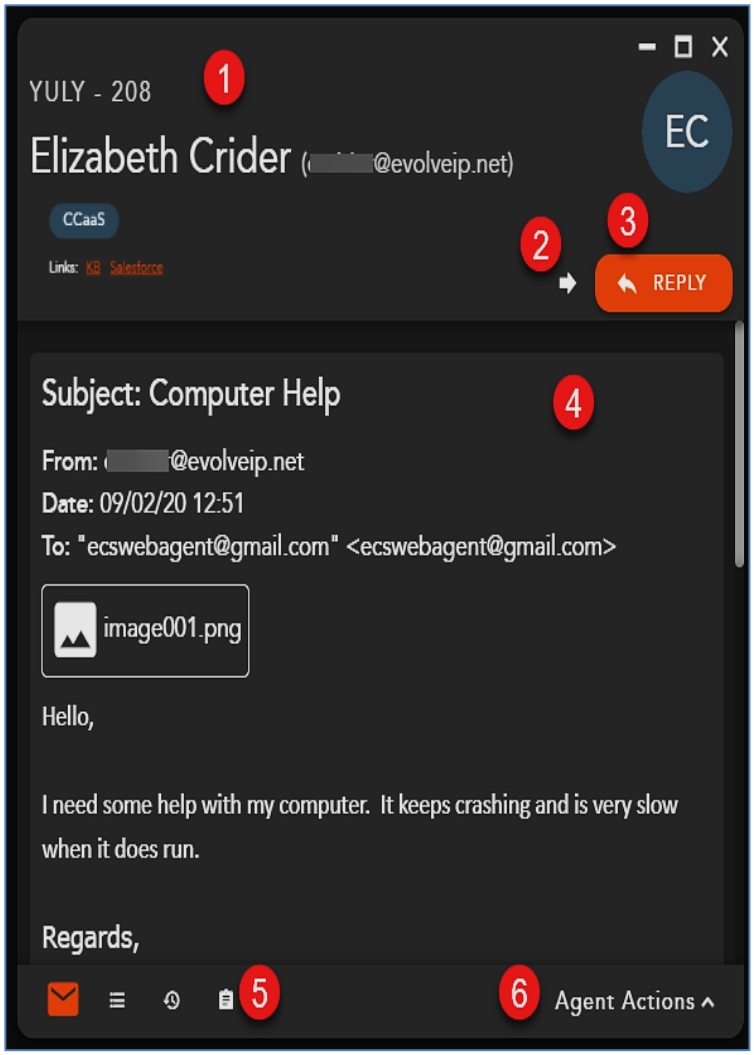


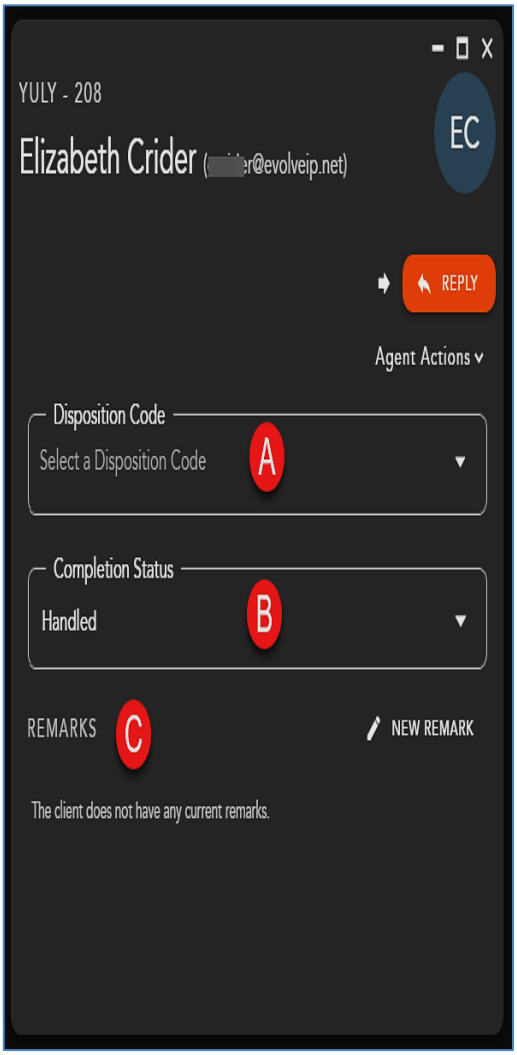
Once selected the consulted party will be removed and the interaction will revert back to the main interaction window. The contact will be on hold. Resume the interaction, by selecting the **Resume icon** on the Interaction Toolbar.



Handling Email Interactions

Email Interaction Interface





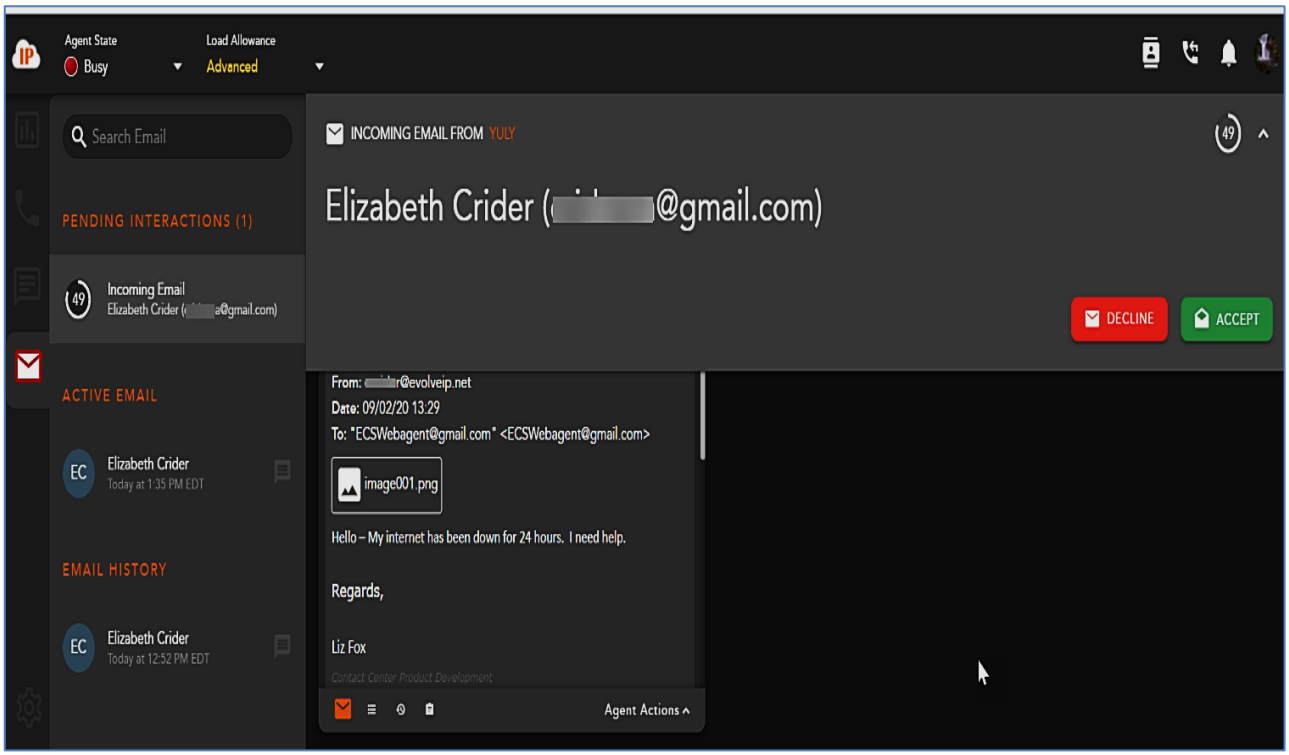
1. **Email Interaction Header** - displays the following information:
    a. Originating Business Process
    b. Name and Email Address
    c. Demands
    d. External Links - hyperlink to open to a URL configured in the Setup client. The links can integrate with a CRM or internal knowledge base, which contains specific information about a customer or help documents. By clicking on a link, you will be redirected to the predefined URL, providing more detailed information on the person they are working with or help documentation.

2. **Transfer** - initiates a blind transfer to another Agent, Supervisor or Business Process.
3. **Reply** - opens the email interaction to allow the agent to provide a response. Once an agent has opted to reply to an email interaction, they no longer can transfer the email to another agent, supervisor, or Business Process. They must either cancel out the interaction without providing a response or reply to the email interaction.
4. **Email Body** - Will contain the Subject, From: Sender, Date, To: Email Destination, and body of the email
5. **Interaction Footer** - contains the CRM information for the contact - Contacts, History and Notes/Remarks.
6. **Agent Actions** - selecting agent actions will change the chat screen to show the following options:
    a. Disposition Code - pre-defined code to indicate the outcome of the interaction. These codes are specific to the Business Process and can be customized for each Business Process.
    b. Completion Status - explanation as to why the interaction ended. A status may be selected during or after an interaction. The completion statuses available will depend on the type of interaction handled
    c. Remarks - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks

Email Panel

The email panel displays your:

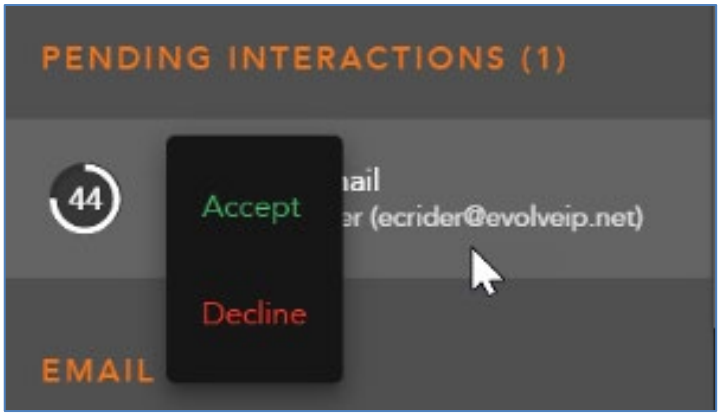
1. Pending Interactions
2. Active Chats
3. Chat History



Pending Email Interactions

Within settings, agents can choose how they wish to display their incoming interactions: Banner & Panel, Banner only, or Panel only. If Banner & Panel or Panel is chosen, any incoming pending interaction will show up in the Email panel. It will provide the No Answer Time Out countdown, Interaction Type and Originating Business Process, Name and Email address. If the agent chooses to only display incoming interactions through the Banner, the interaction panel will not display pending interactions.

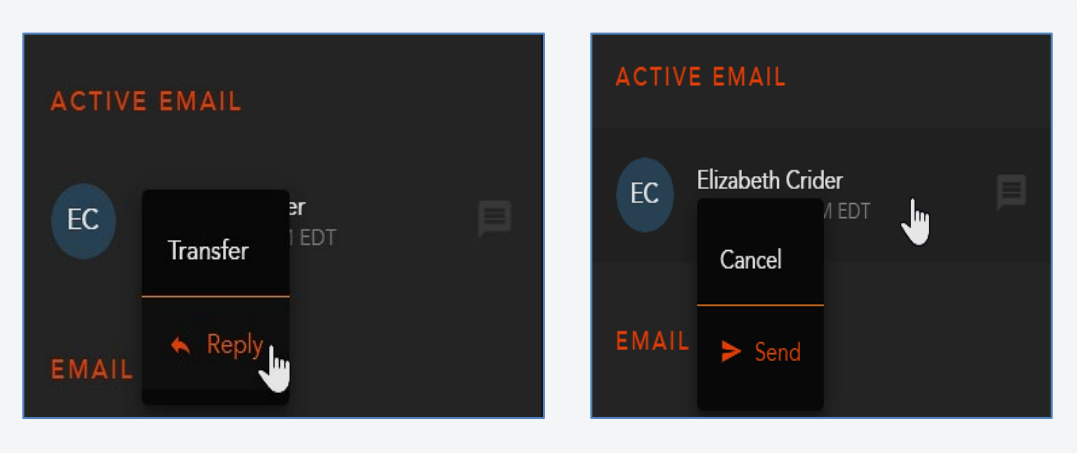
From the panel, by right clicking on the pending email interaction, the agent can accept or decline the interaction.



Active Emails

The Active Email session displays all active Email interactions. Each active Email will display the name of the contact and the date and time the interaction was received.

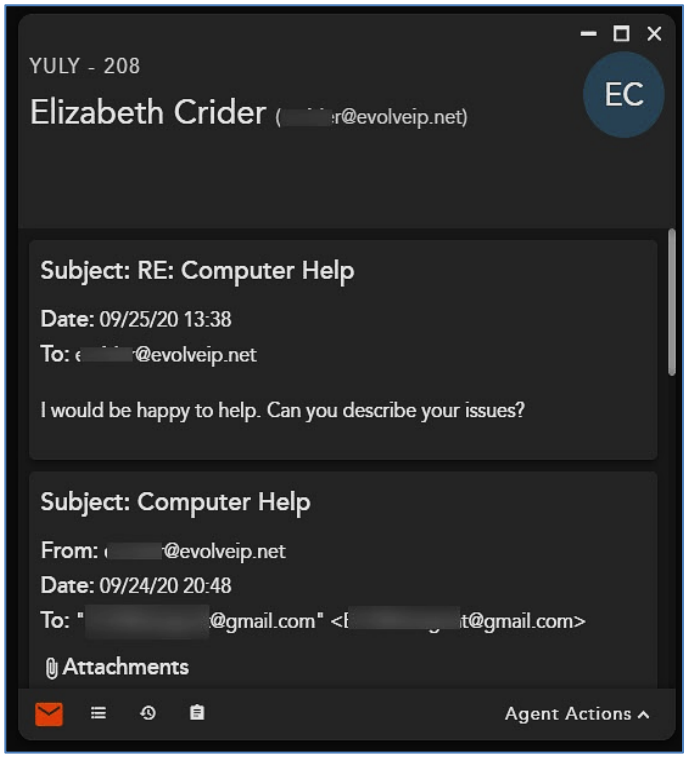
By right clicking on an active email within the panel, you will have interaction control to *Transfer/Reply* or *Cancel/Send* an email. If an agent chooses to reply to an email, the interaction controls will change to cancel or send a reply to the email interaction.

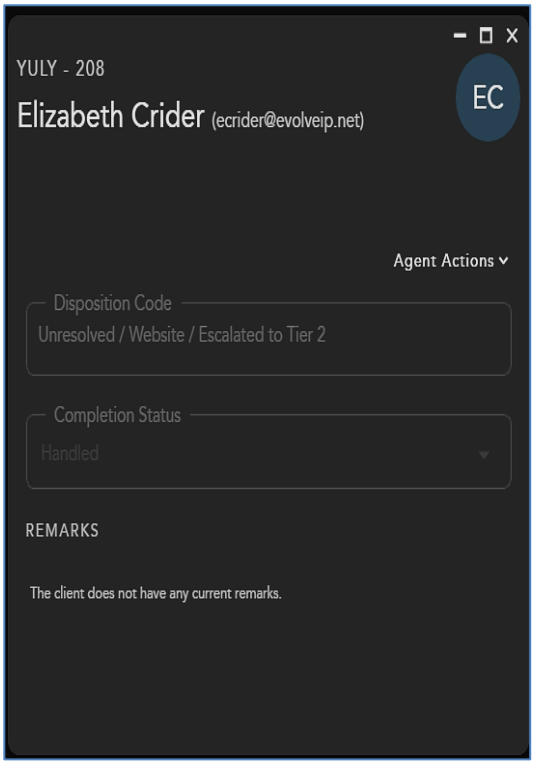


Email History

Email history will show all recent historical email interactions, including the customer name, date and time the interaction was handled.

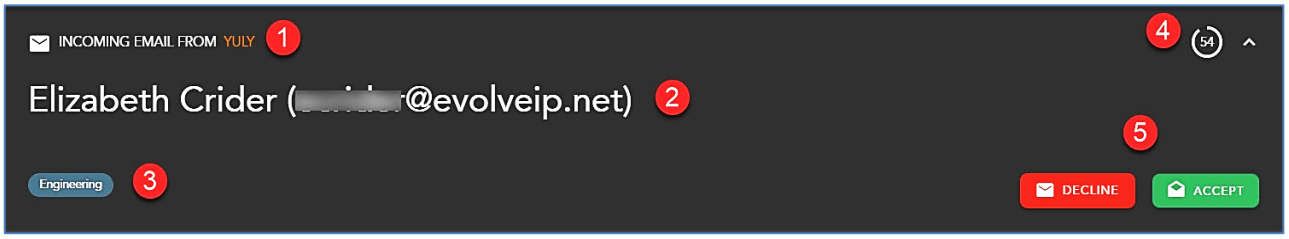
Double click on an interaction will open the historical interaction and display the email history, completion status, and disposition code applied to the interaction.





Interact with an Email Interaction

Accepting a Email Interaction



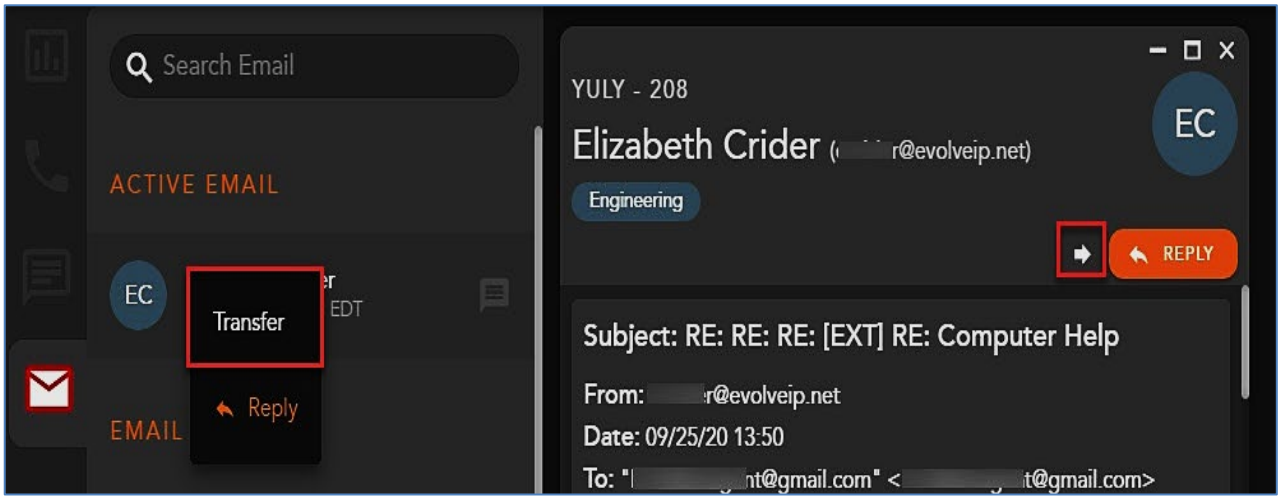
When a new email interaction is being offered to an agent the following information will be present for review before accepting the interaction:

1. The Interaction Type and Originating Business Process
2. Name and Email Address
3. **Interaction Handling Remarks and Demands** - prepopulated through the Interaction Handling Flow configured in the Setup client. If no remarks are present for the interaction this field will not be visible on the interaction. Specific demands assigned to the interaction via the handling flow and utilized to assign the interaction to the appropriate agent

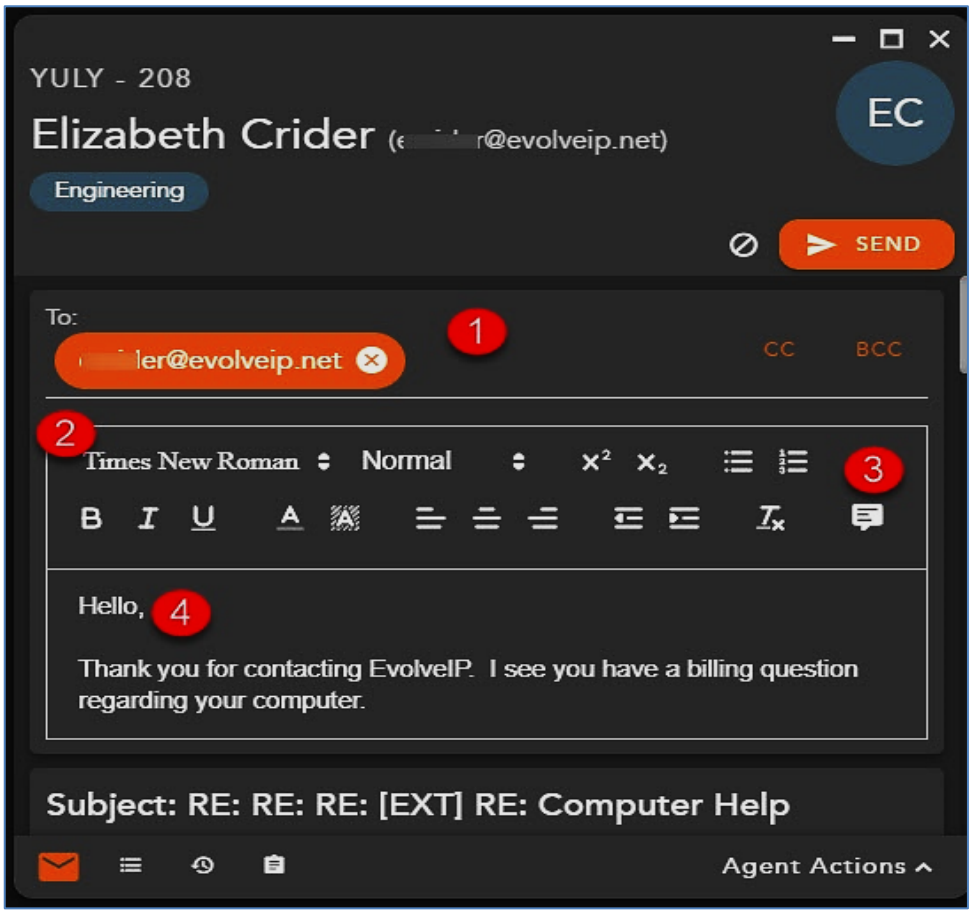
4. **No Answer Time Out** - preconfigured in the Setup Client. If the interaction is not answered within this timer, you will be put into a No Answer State.
5. **Decline or Accept** - Accept or Decline the incoming interaction
    a. To accept and reply to the incoming email, select the **[Accept]** icon
    b. To decline the interaction and send the interaction back to queue, select the **[Decline]** icon. Note, if you are the only ready agent in the Business Process, the interaction will continue to present itself until accepted or another agent becomes ready.

Reply to an Email

Once an email interaction has been accepted, the agent will have a chance to preview the email before deciding if they can provide a reply. If the agent wishes to reply to the email, the agent can select *Reply* in the email interaction of right-click on the active email interaction from the App Side bar, then select **Reply**.

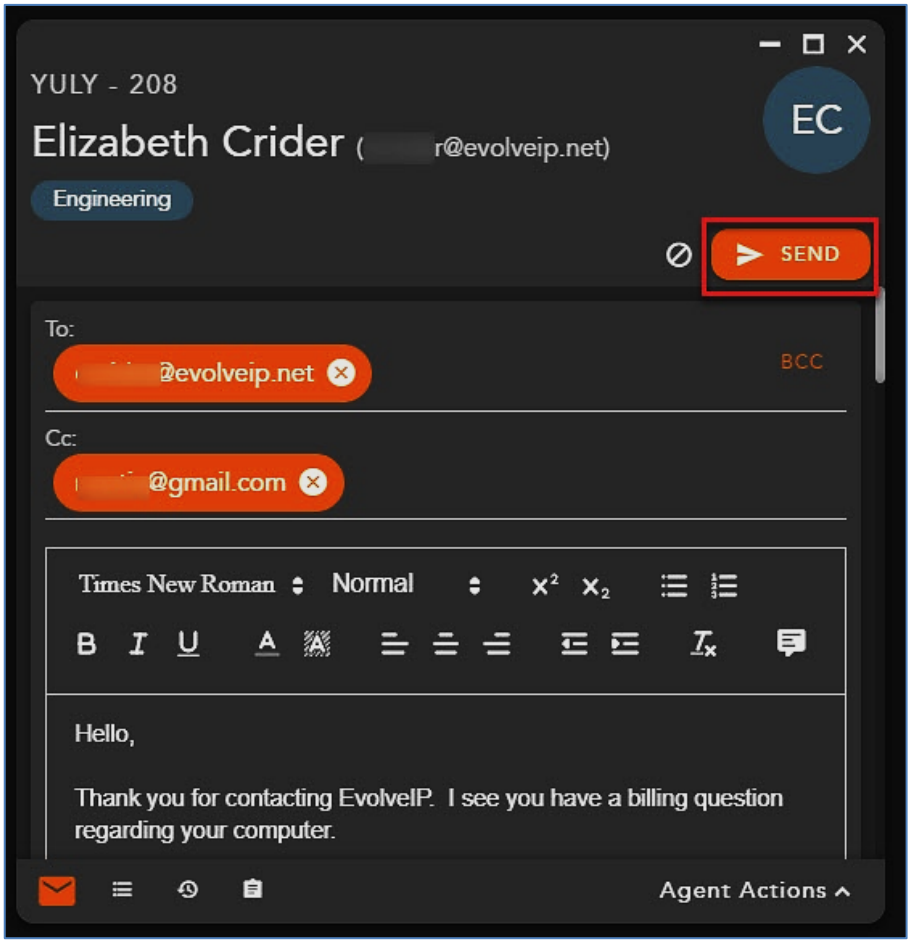


Once the agent has selected Reply, the email interaction window will update to allow the agent to send a response. Within the new window the agent will have the ability to:

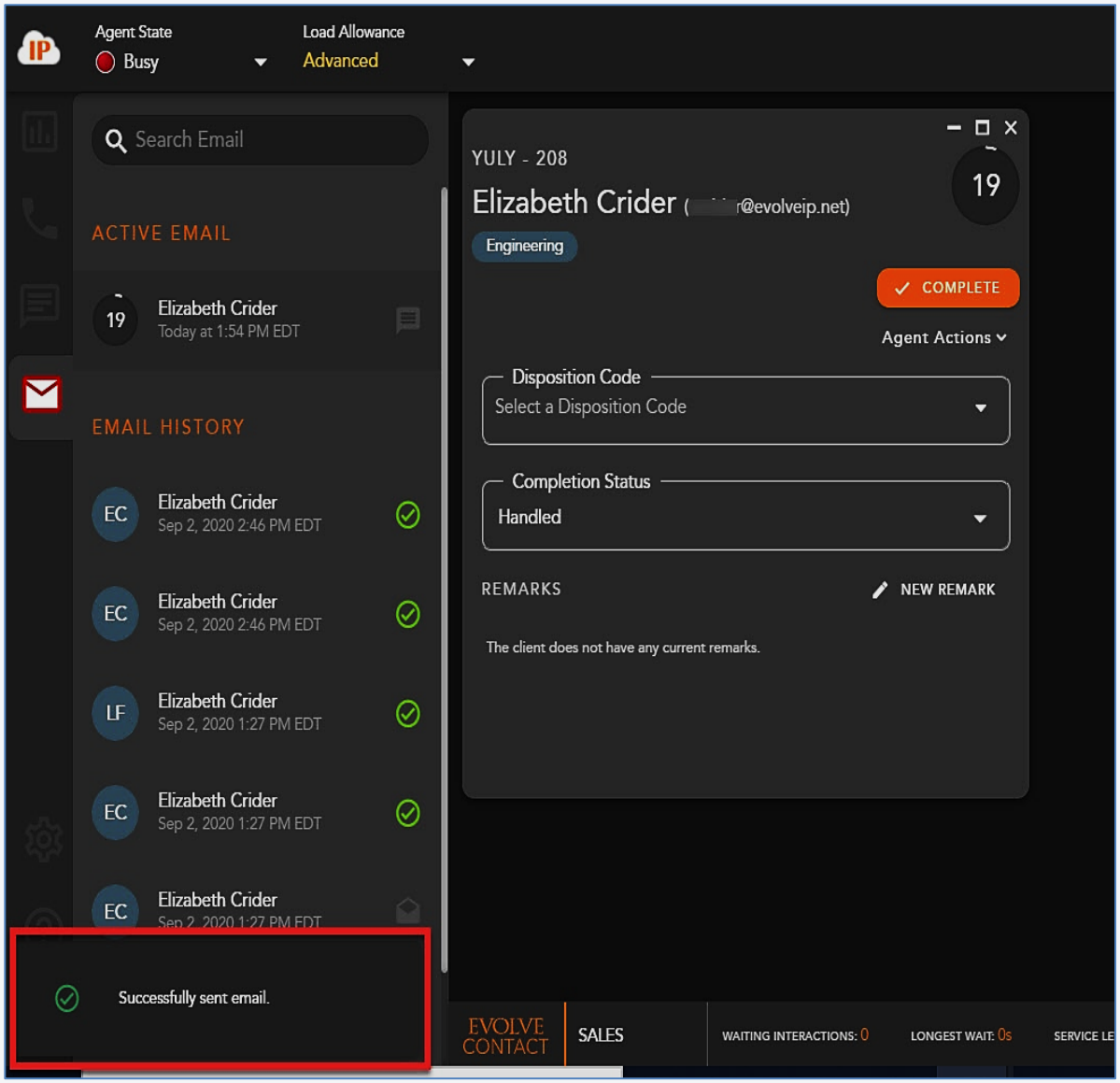


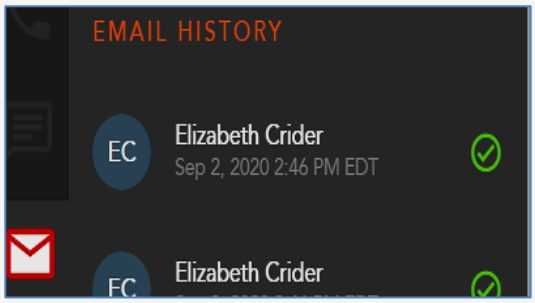
1. **To/CC/BCC** - Add additional email addresses to be included in the agents reply. The Agent can add additional email addresses to the To field or select the CC or BCC fields.
2. **Stylize Options** - stylize the email from the following options:
    a. Font
    b. Font Size
    c. Bullets/Numbers
    d. Bold/Italics/Underline
    e. Font Color
    f. Shading
    g. Font Placement
3. **Canned Responses** - pre-configured email responses
4. **Email Body** - email response window, where the agent will type in the response to the email interaction

Once the agent has entered in the response and is ready to send, select **Send** in the interaction window.



A confirmation message will appear when the email was successfully sent. To complete the interaction, select a disposition code (*if mandatory*), a remark for the contact if needed, followed by Complete. Completing the interaction will end the interaction, moving the email to historical interaction in the App Side ba,r and changing the agent state to *Ready* to handle another interaction.

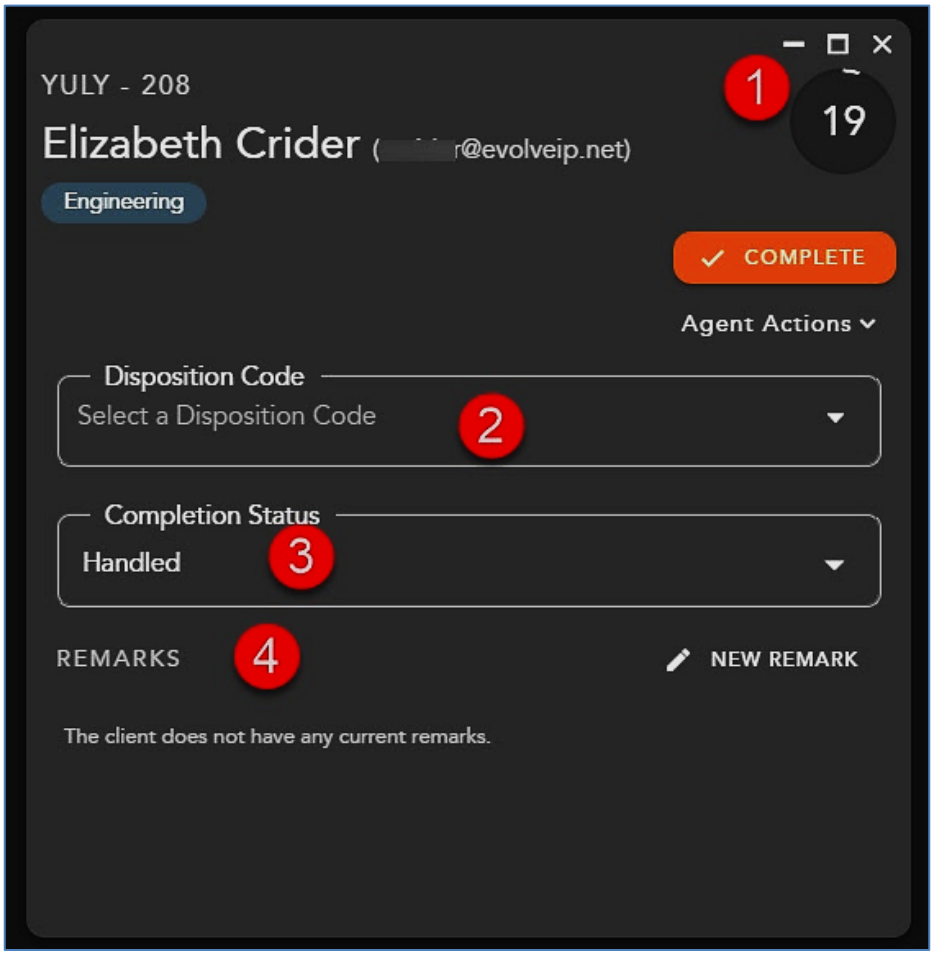

Agent State
Busy
Load Allowance
Advanced
Search Email
ACTIVE EMAIL
19
Elizabeth Crider
Today at 1:54 PM EDT
EMAIL HISTORY
EC
Elizabeth Crider
Sep 2, 2020 2:46 PM EDT
EC
Elizabeth Crider
Sep 2, 2020 2:46 PM EDT
LF
Elizabeth Crider
Sep 2, 2020 1:27 PM EDT
EC
Elizabeth Crider
Sep 2, 2020 1:27 PM EDT
EC
Elizabeth Crider
Successfully sent email.
YULY - 208
Elizabeth Crider
Engineering
19
COMPLETE
Agent Actions
Disposition Code
Select a Disposition Code
Completion Status
Handled
REMARKS
NEW REMARK
The client does not have any current remarks.
EVOLVE CONTACT
SALES
WAITING INTERACTIONS: 0
LONGEST WAIT: 0s


EMAIL HISTORY
EC
Elizabeth Crider
Sep 2, 2020 2:46 PM EDT
EC
Elizabeth Crider

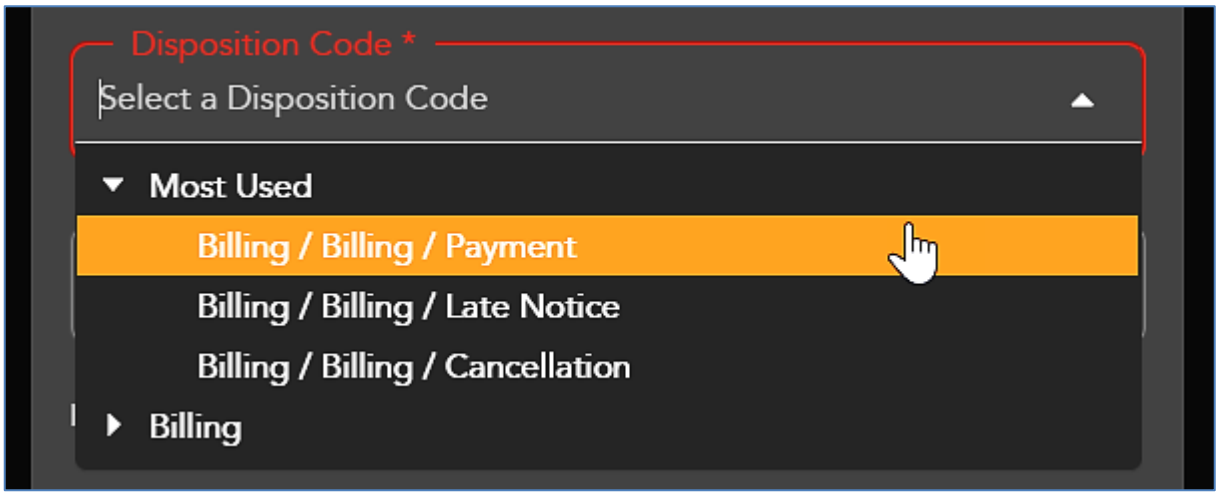
Completing an Interaction

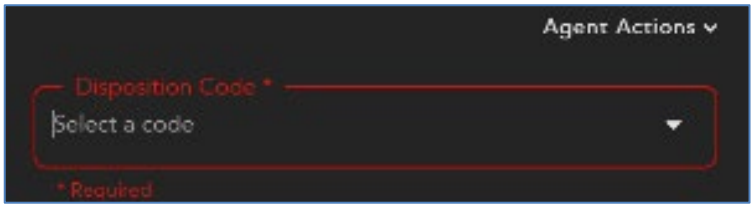
Once an agent has sent a reply to the email interaction, the agent will automatically be put in a wrap-up state if pre-configured in the Setup Client. If no wrap-up has been configured, you will automatically be put back into a Ready state.

If Wrap-up has been configured, the following options will be available to complete the interaction.

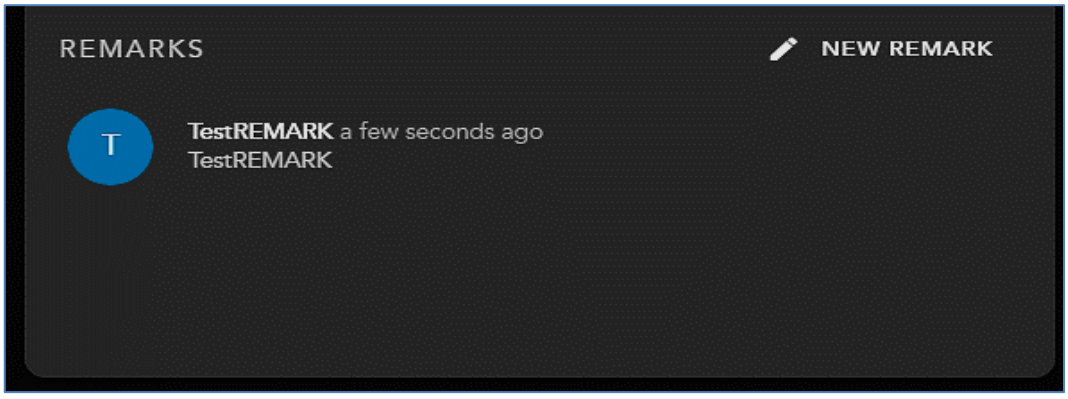


1. **Wrap-up Timer** - counts down the amount of time left in wrap-up
2. **Disposition Code** - apply a disposition code to the interaction. If no disposition codes have been configured for the originating Business Process this option will not be available. By default, your three most used disposition codes for the originating Business Process will be at the top of the disposition drop down, followed by all disposition code categories and subcategories.
    a. If the disposition code is mandatory, that option will appear in **red**. You must select a disposition code before you can complete the interaction.

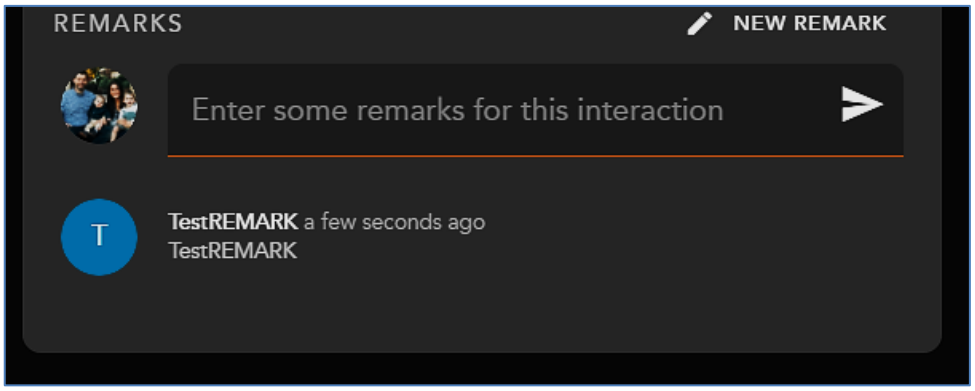




3. **Completion Status** - result of the interaction. The completion statuses available will depend on the type of interaction handled.
    a. Handled - default value for completed interactions. The interaction was completed and handled.
    b. Delegate to Supervisor - this option is only available if enabled for agents in the Setup Client. Once a call has ended, agents can delegate a call to a supervisor with remarks attached providing an explanation as to why the interaction has been delegated to a supervisor
4. **Remarks** - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under *Notes and Remarks*.



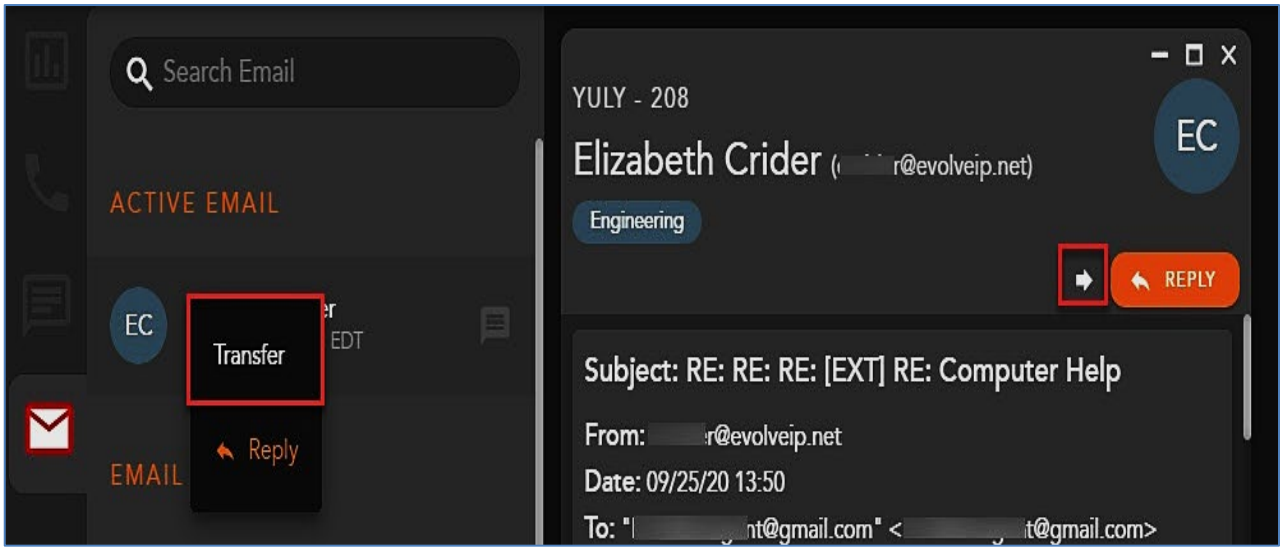
a. To add a new remark to the interaction, select **[New Remark]**. Once selected the remarks field will open to add a new remark.



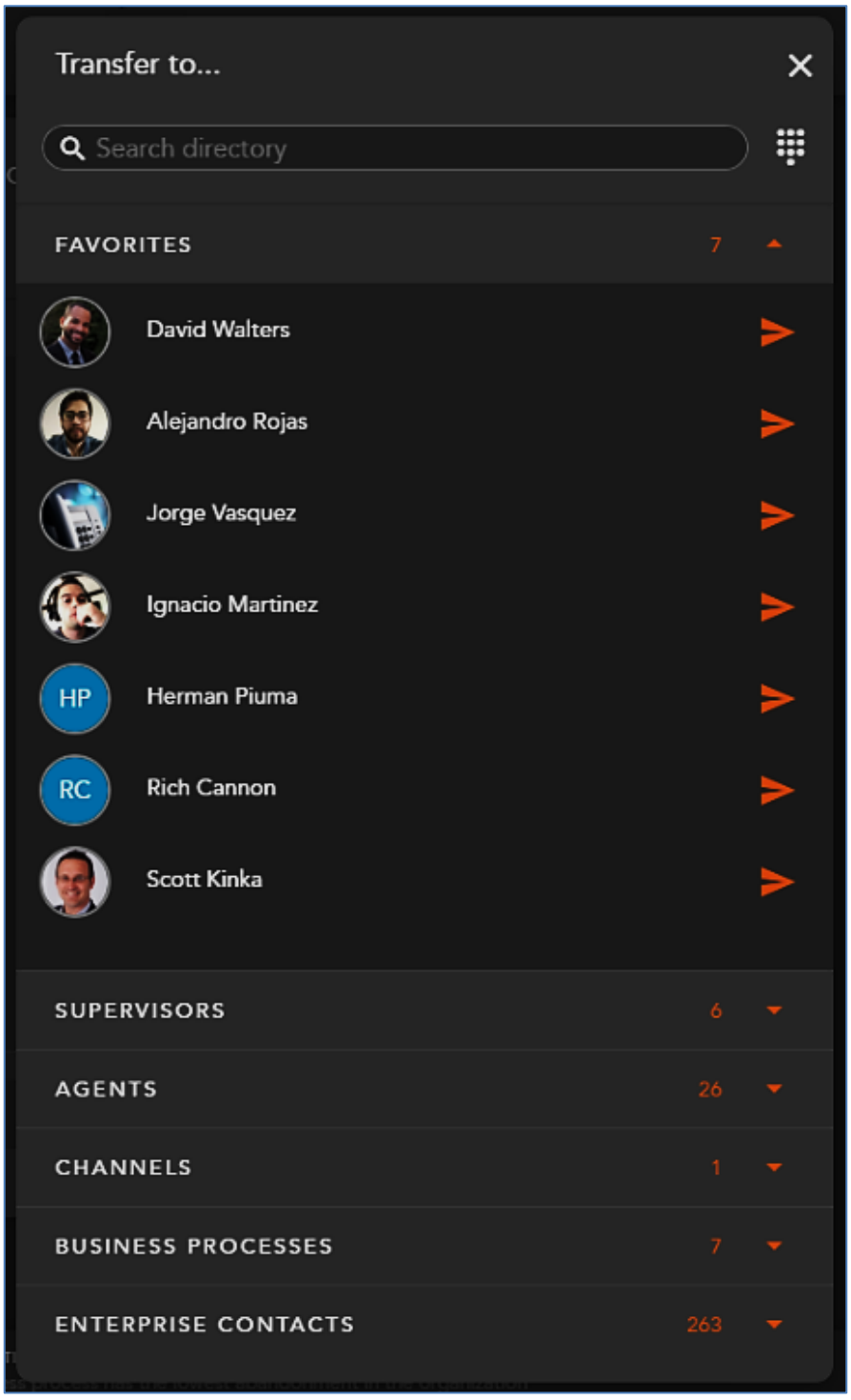
Transferring an Email

An email interaction can only be blind transferred (consulted transfer is not possible with email interactions) if the agent has not opted in to replying to the email. If the agent has already selected to send a response, they can no longer transfer the email interaction.

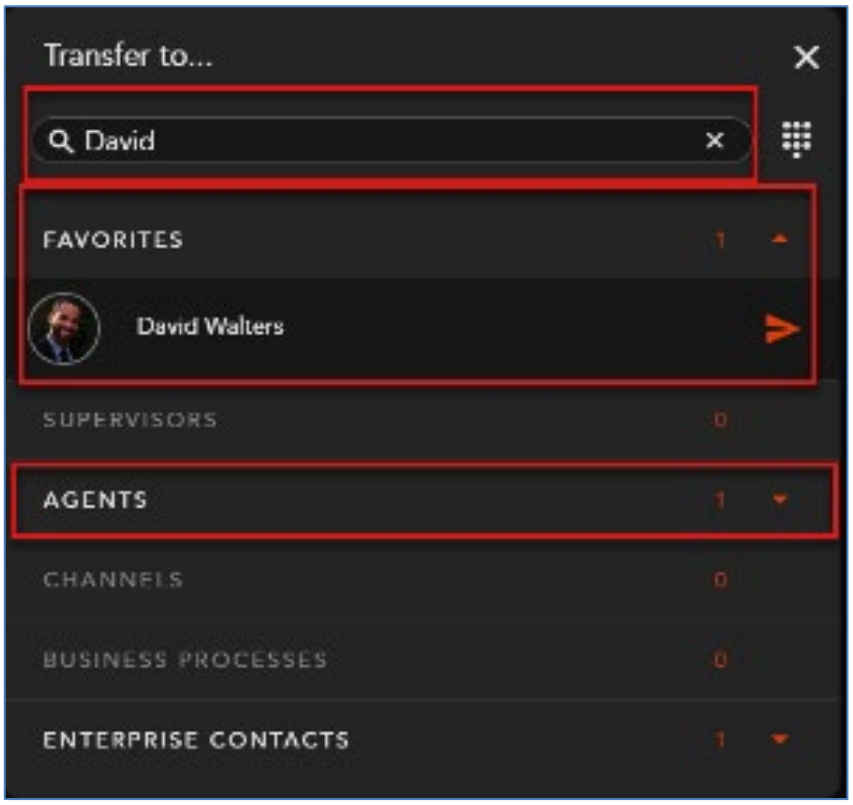
Once the email interaction has been accepted; to transfer the interaction to another Agent, Business Process, Supervisor or Channel, select the **Transfer** Icon within the email window or right-click on the active interaction in the App Side Bar.



The Transfer window will open, by default the agents favorites will be expanded.

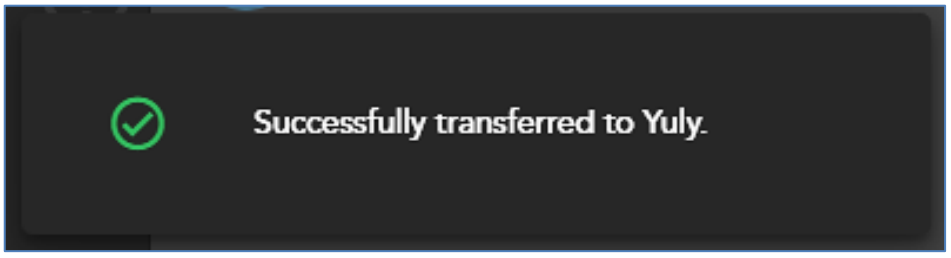


Within the search bar type the name of the Agent, Business Process, or Channel you wish to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.



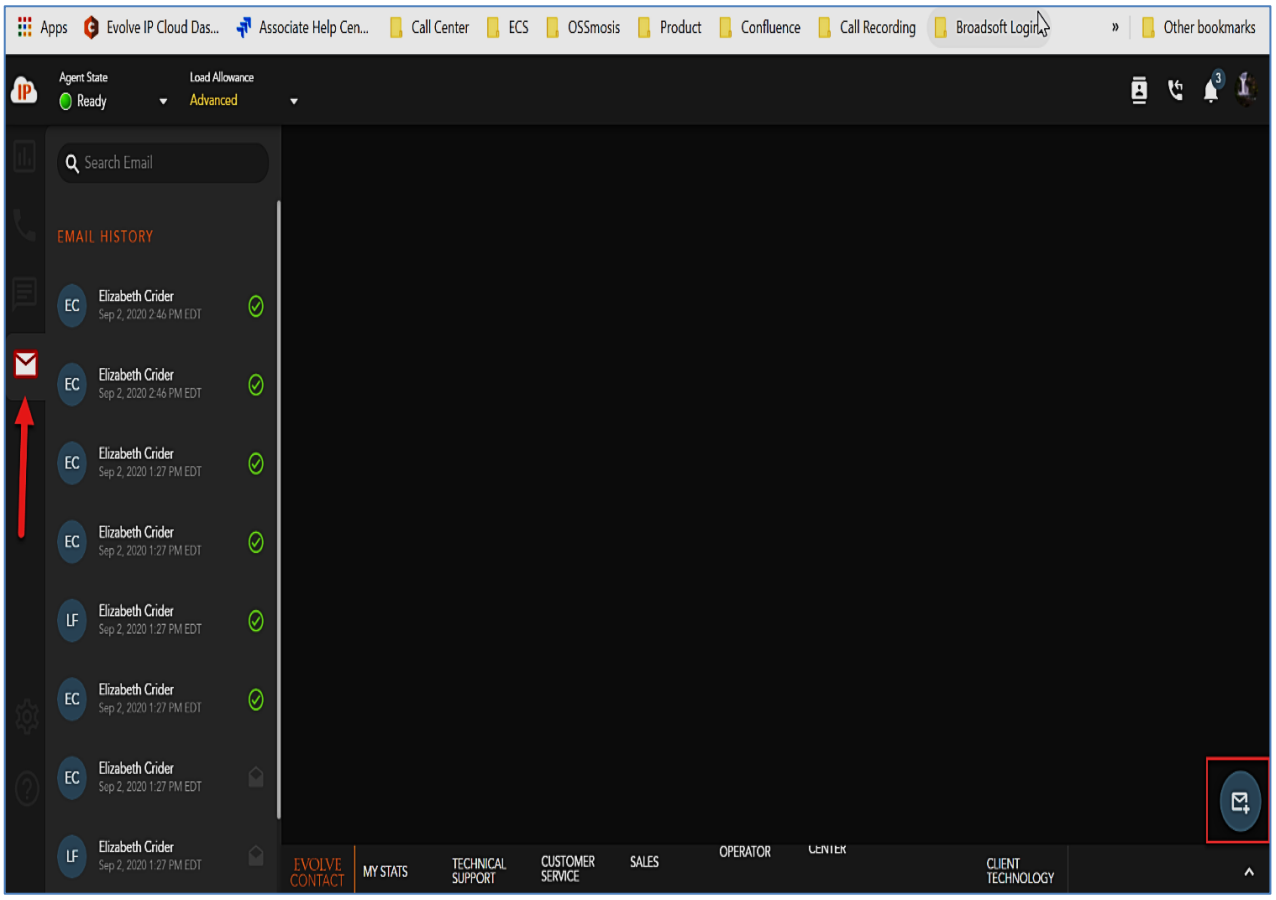
Select the **transfer arrow** to complete the blind transfer.

Once the transfer has been initiated, the interaction will disappear and you will receive a "Successfully Transferred" message.

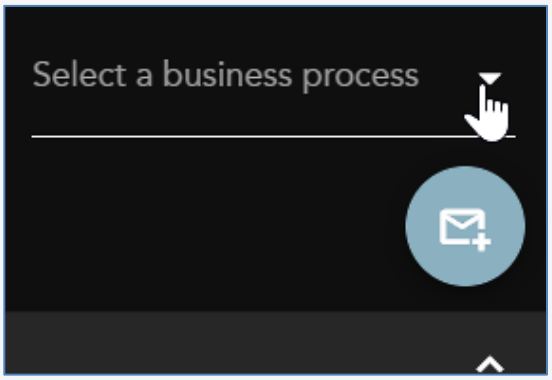


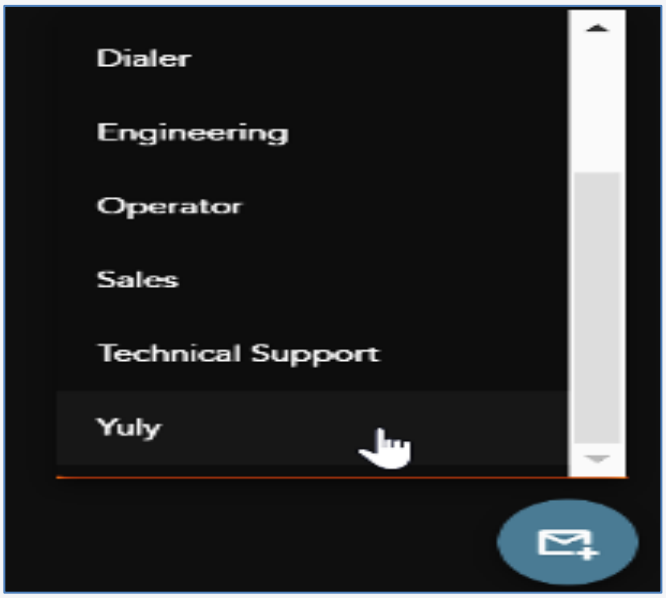
Initializing a New Email Interaction

To initialize a new outgoing email interaction, select the email tab on the App Side Bar, followed by the create new email button on the bottom right hand corner of the agent screen.

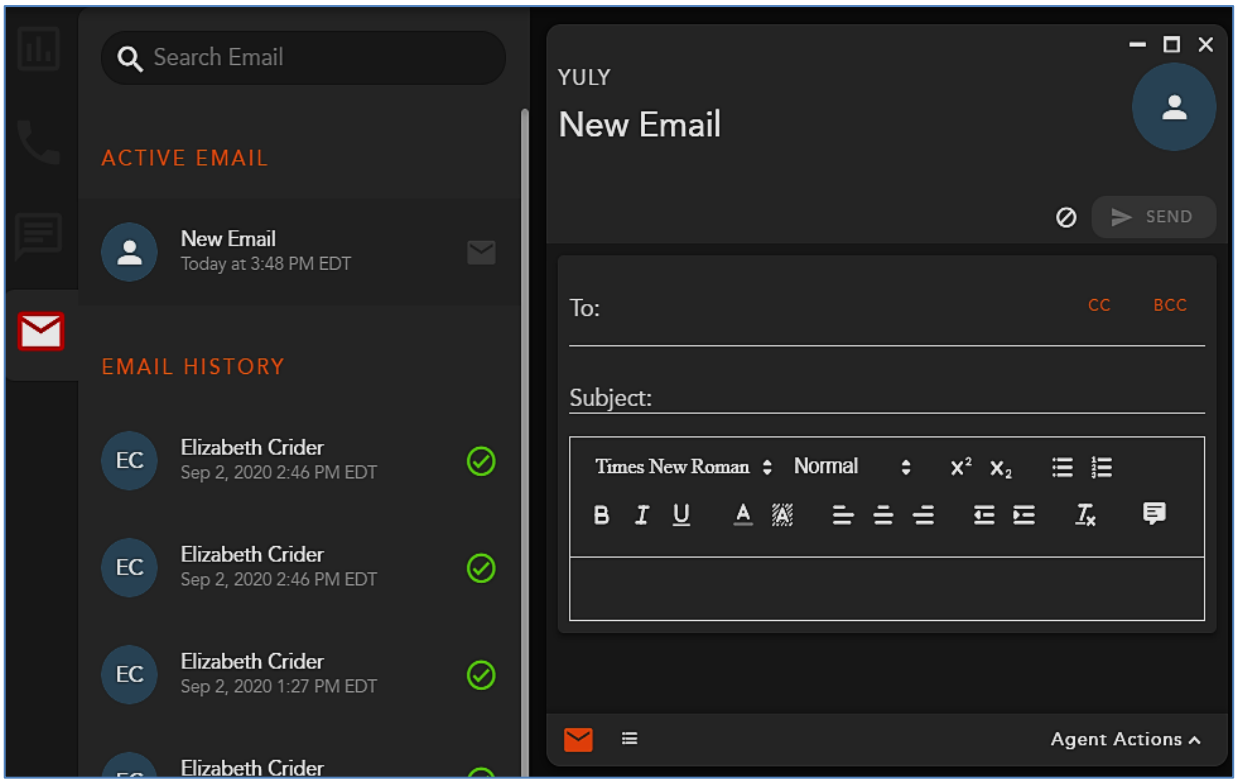


The agent will be prompted to select the outgoing Business Process to send the email interaction from.

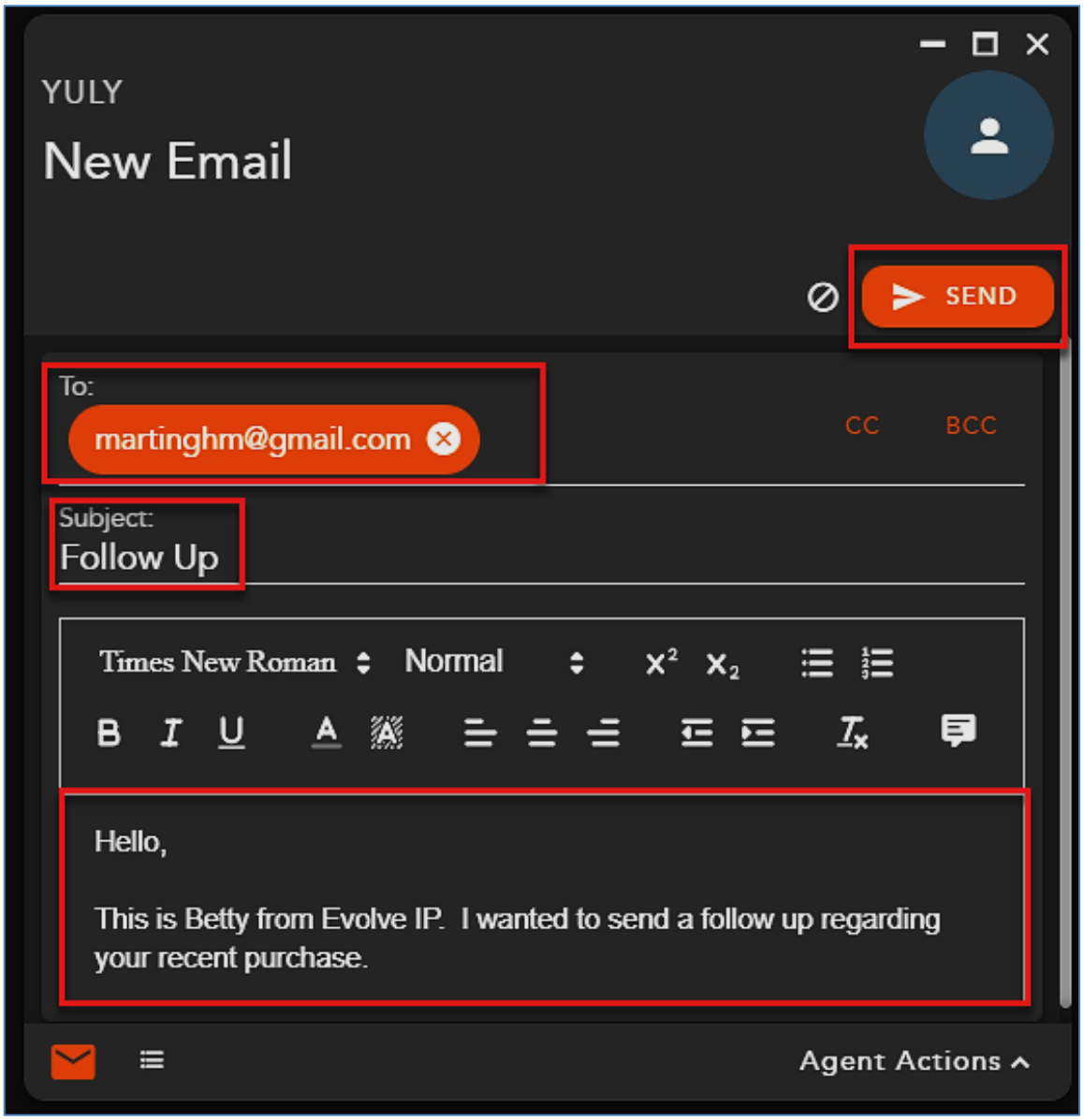




Once a Business Process has been selected a new email interaction will open.



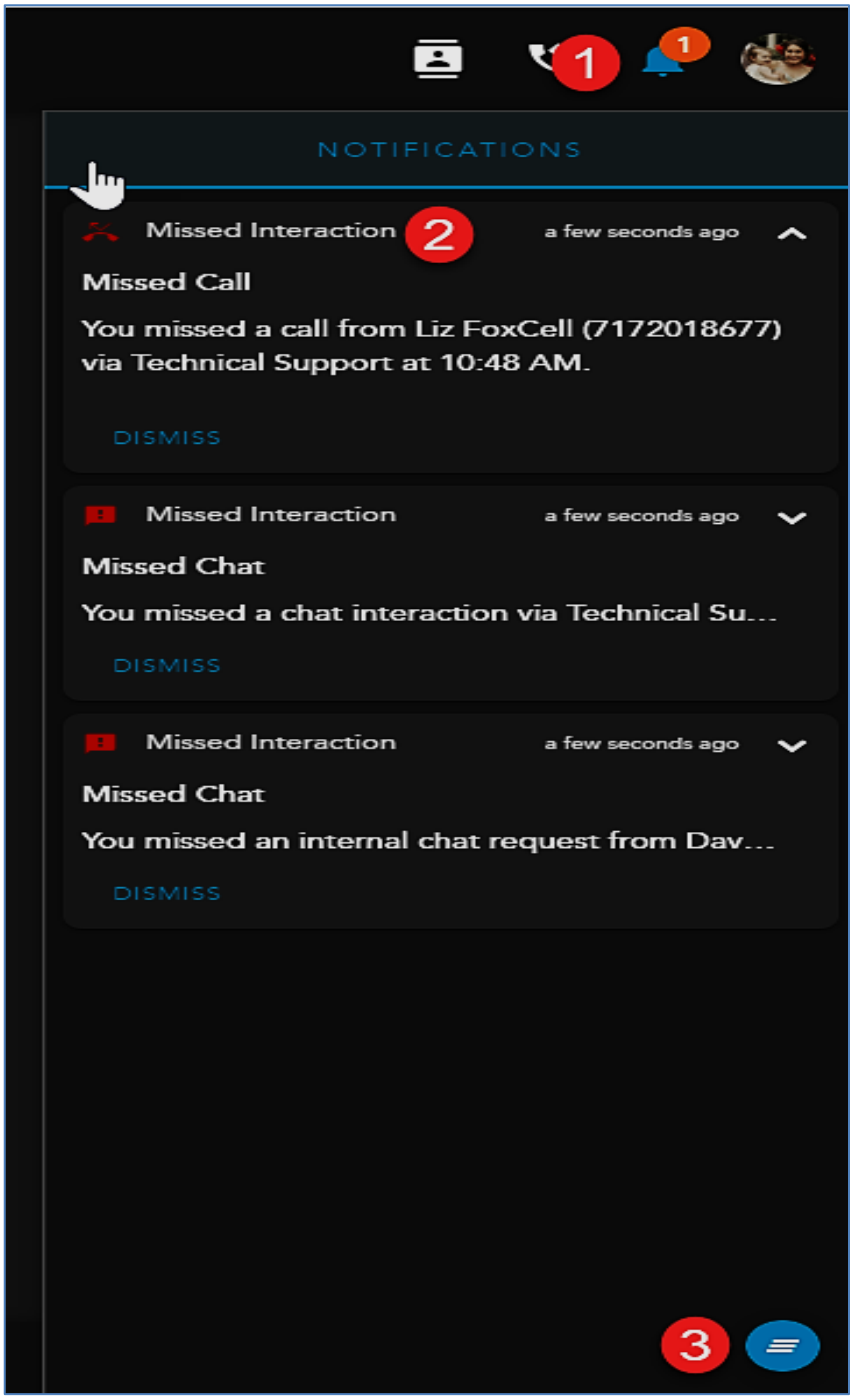
Enter in the appropriate recipient email addresses into the To/CC/BCC fields, Subject and fill in the email body. Once these three required fields have been added, the agent will be able to send the email.



Notifications

Overview

The Notifications panel currently shows the agents all their missed queued and internal interactions.



1. **Notifications Panel Icon** - Shows the total of recently missed interactions
2. **Notifications Panel** - displays the following information:
    a. Notification Type
    b. Timestamp of Missed Interaction
    c. Interaction Type

d. Contact Info: Name, Email (for missed chat interactions), Phone Number

e. Time

f. Dismiss

3. **Dismiss All** - Dismiss all Notifications from the panel. This option will appear when you have accumulated three or more notifications.

Settings

Overview

1. **Theme**: choose from multiple-colored themes for the application, as well as the dark or light mode of the theme

2. Preferences

   a. **Incoming Interaction Display**: choose how to display and alert the agent of an incoming interaction: Banner, Panel or both Banner and Panel

b. **Interaction History Display Period**: choose how long to display your historical interactions: Daily, Weekly, or Monthly. After selected period the interactions will be removed from your historical interaction display

c. **Always Maximize Interactions**: when enabled, an accepted interaction will automatically open in the maximized view

d. **New Incoming Call, Chat and Email Ringtones**: choose a ring tone to differentiate between the different media types offered to an agent. Selecting a ring tone is optional.

e. **Show Stats when Idle**: select between None, 10 seconds, 30 seconds, 1 minute or 5 minutes. If the agent sits idle on the main interaction window, it will default back to the Agent Intelligence Center after the select time-period.

f. **Break Expiration Alert**: select between None, 10 seconds, 30 seconds, 1 minute or 5 minutes. If an agent is on break and it has an expiration, this will alert the agent when the break expiration is approaching.

3. Application Settings:

a. **Language** - default language of application upon login

b. Time Format:

c. Twelve Hours (AM/PM)

d. Twenty-four hours (00:00)

e. **Time Zone** - default time zone for application

4. Agent Settings:

a. **Default Outgoing Business Process** - Any outgoing call or chat requires a Business Process for caller-ID purposes. By default, the Business Process chosen is the based on alphabetical order. If never changed, this Business Process will always be the caller-ID out pulsed when making an outgoing chat or call. Selecting from the drop down will allow the agent to change which Business Process caller-ID they wish to out pulse. This change will be saved and remain the default until changed.

b. Change Extension

c. Default - the default extension is configured in the setup client and will be the default end point used when logging into the application

d. Private Phone - private phone options are configured in the setup client by a supervisor or admin. If configured, this option to change your application end point to a private phone will be available, with the pre-configured numbers to choose from.

e. Custom - enter in a ten digit DID to route calls. This can be used if you need to work from home and need to route calls to your cell phone for the day.

PAGE LEFT
INTENTIONALLY
BLANK

PAGE LEFT
INTENTIONALLY
BLANK

EVOLVE IP, LLC

Evolve Contact Suite: eAgent Users Guide v5.22.1