EVOLVE IP

THE CLOUD STRATEGY COMPANY™

Evolve Contact Suite: Agent Client

User Guide

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Evolve IP® Guide

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1. Introduction

1.1 What is the Evolve Contact Suite Agent Client?

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

The Agent Client allows contact center agents to:

- Respond to incoming voice calls, chat requests, & email messages
- Place calls and initiate internal chat sessions.
- Consult while placing an interaction on hold, transfer interactions and perform conference calls and chats by inviting other parties such as supervisors, other agents and external parties to join the interaction.
- Record on demand voice interactions.
- Handle Multiple Interactions at the same time, via Load Allowances

These activities as well as other available activities are described in detail in this User Guide.

1.2 Audience

This document is targeted at Contact Center personnel that use the Agent Client.

1.3 Omnichannel

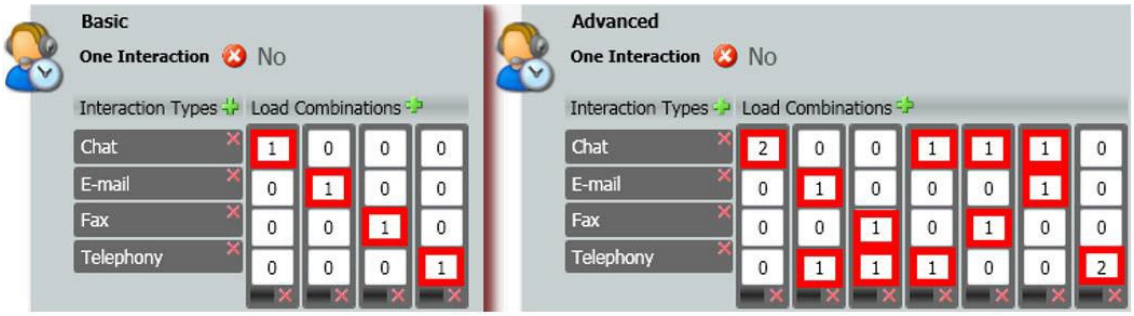
As consumer technology has changed, so have expectations around how customers interact with companies. Customers expect the ability to interact over multiple channels (email, text, web chat, social media, calls, etc.) seamlessly. Contact centers need to deliver outstanding customer service through omnichannel technology that empowers their agents' success.

Many contact centers struggle with multi-channel solutions that involve multiple technology silos that hinder customer satisfaction and management visibility. Evolve IP offers true omnichannel technology.

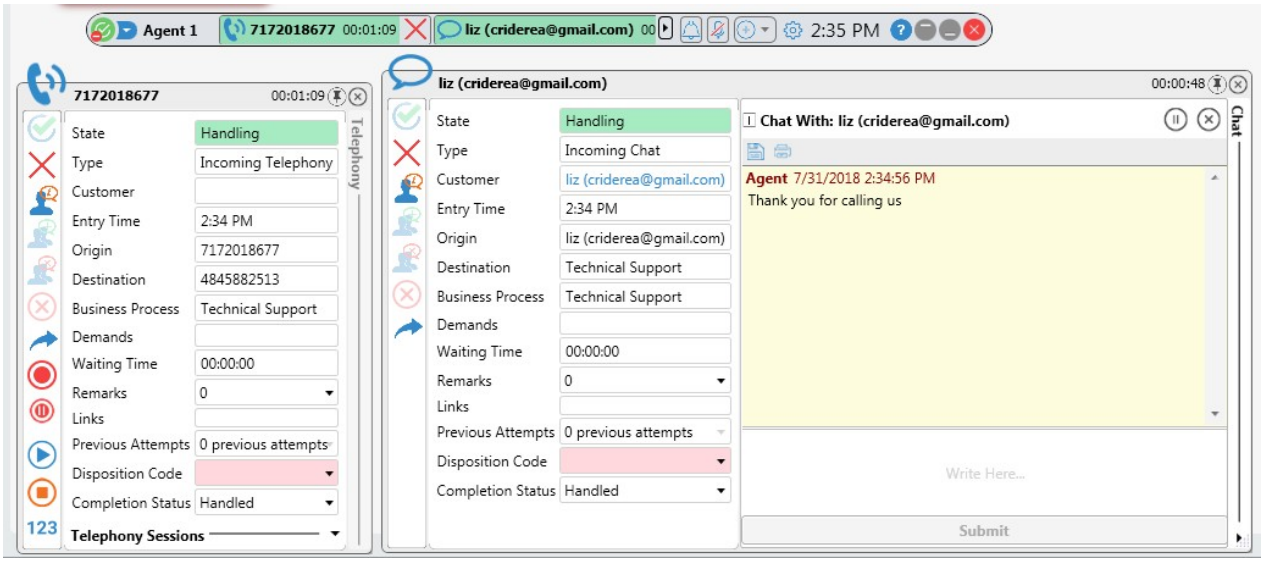
1.4 Handling Multiple Interactions

The Evolve Contact Agent allows agents to handle multiple interactions according to each agents' defined Load Allowance.

This feature will allow organizations to send more interactions to their most suitable agents, who are equipped to handle the additional workload. They can also scale back the allowance for agents who need to focus on one interaction at a time.



Example: The agent below is setup with an Advanced load allowance and is handling both a chat and voice interaction at the same time.



Multiple Interactions

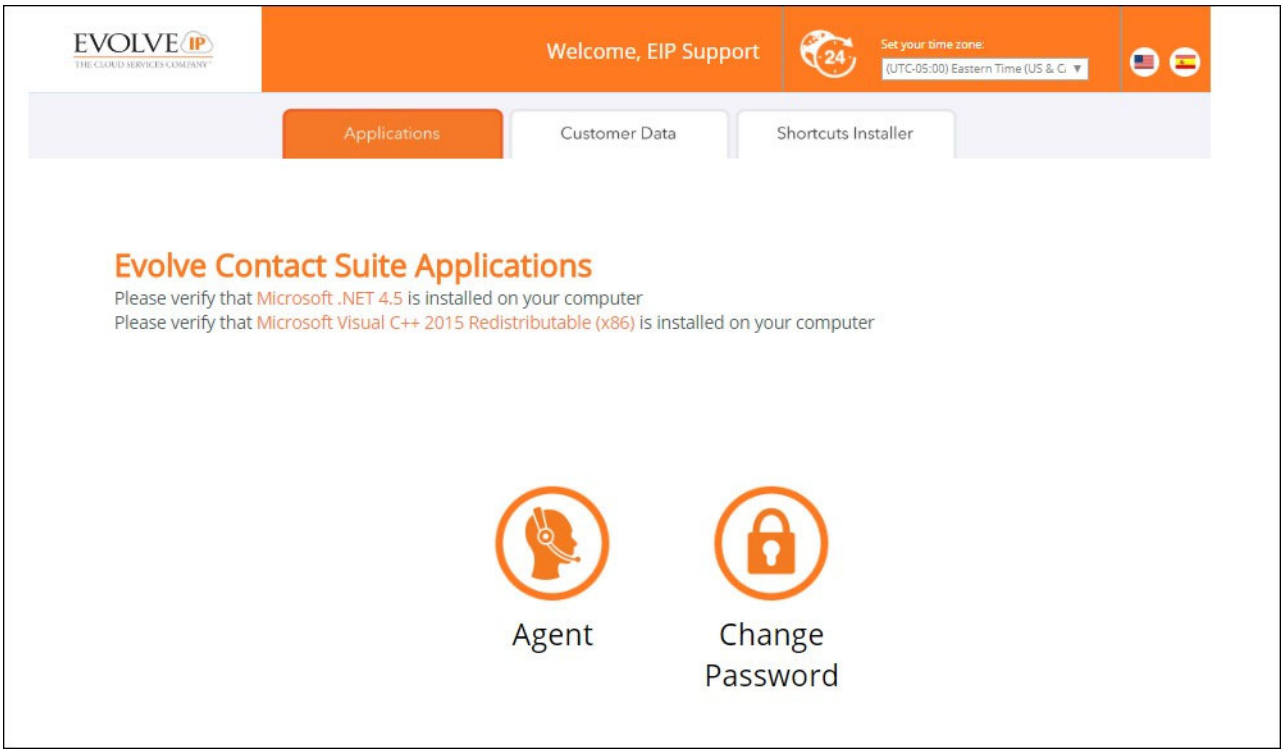
	Note: When handling more than one voice interaction, agents can be busy with one interaction when the 2nd arrives. When the 2nd interaction is completed, the 1st will automatically go on hold and when the 1st is retrieved, the 2nd interaction will automatically go on hold as well.

2. Agent Client Overview

The Agent Client may be accessed and opened using the Application site. Your system administrator will assist you with your credentials and relevant URL to access the Application Site.

To start the Agent Client:

1. Open your browser and enter the link (provided by your system administrator) in the URL address bar. The Application Portal page opens.



Application Portal Page

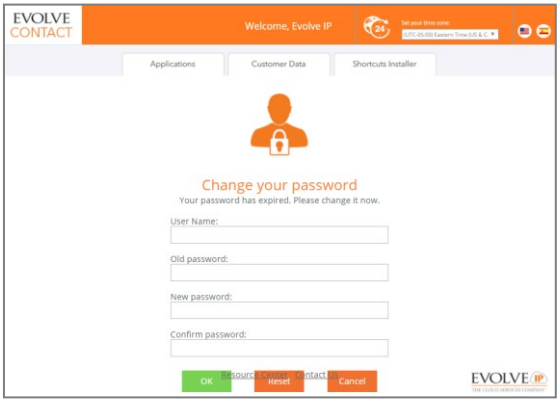
2. If you are a first-time user, you will be required to change and confirm your password to log into the Agent Client application.

3. Click the Change Password link to activate your account. The Change Password Window opens.

Change Password Window

4. Enter the original password (provided to you by your system administrator), enter a new password and then confirm the new password.

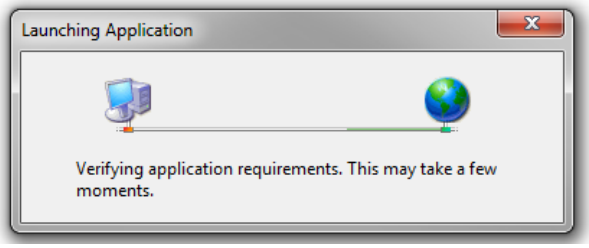
5. Click OK to save the new password. A message appears indicating that your password was successfully changed. Click 'Close Window'.



6. Make sure the Time Zone selection (located at the upper right area of the Application Portal) is set correctly.

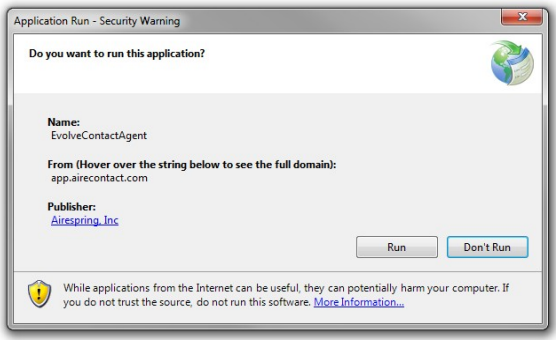
7. If you want to change it: click the Time Zone drop-down and select the time zone in which the supervisor resides. This step is optional, as your Supervisor may also select the relevant time zone via the Supervisor Client.

8. Click the Agent Client Icon to launch the Agent Client application. The Launching Application window opens.



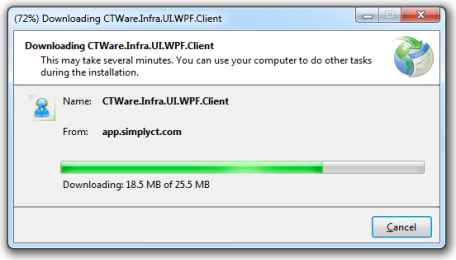
Launch Application Window

9. If this is the first time you are starting the Agent Client application or if the client version was updated, you will be requested to accept the software download.



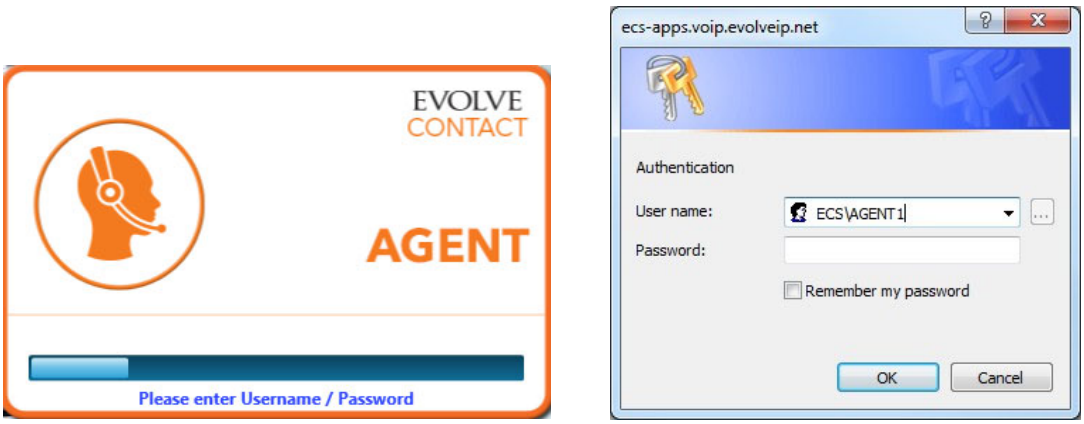
Application Run - Security Window

10. Click Run to accept the software download. The Agent Client application starts downloading.



Application Download Window

11. After all the application requirements have been verified, the relevant authentication window opens, requiring you to enter a User name and Password. The application's 'Splash' screen also appears.



Authentication Dialog

12. Enter your user name and password. The Agent Client opens.

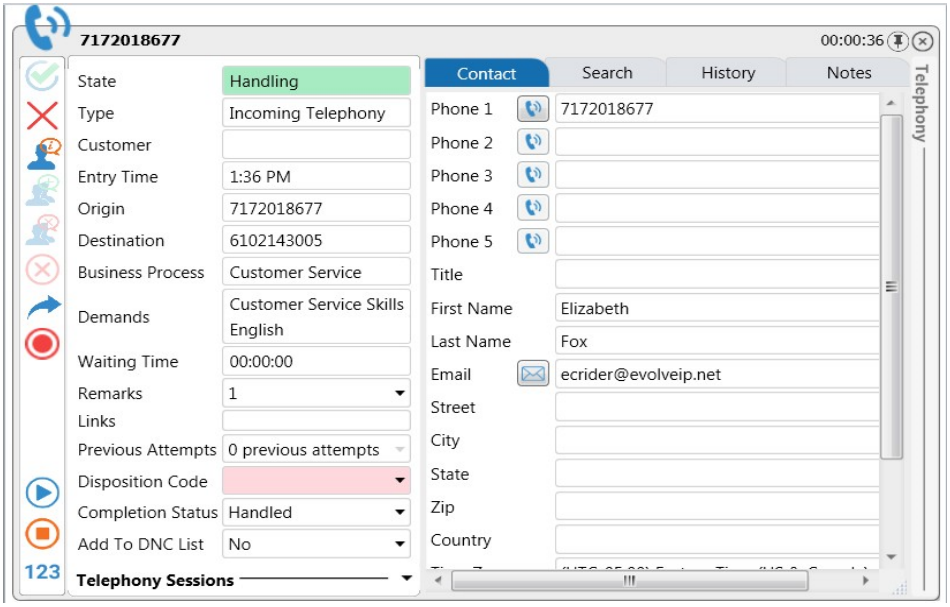
2.1 Agent Client Interface

This section provides an overview of the Agent Client interface. Most features described will be similar for all interaction types (Voice, Chat, Email).

The Agent Client launches the Interaction Bar

Interaction Bar

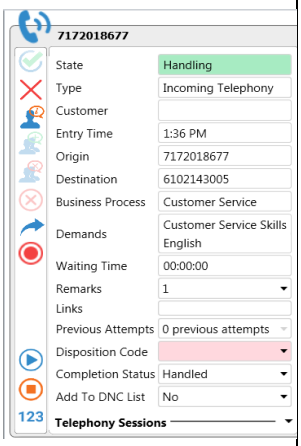
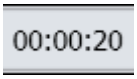
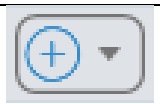
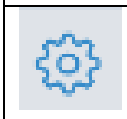
When an interaction is presented to an agent, the Interaction Panel will drop down, revealing information about the interaction (type, business process, demands, etc.)

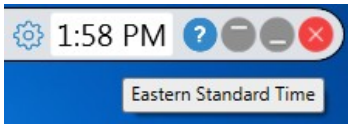


Interaction Panel

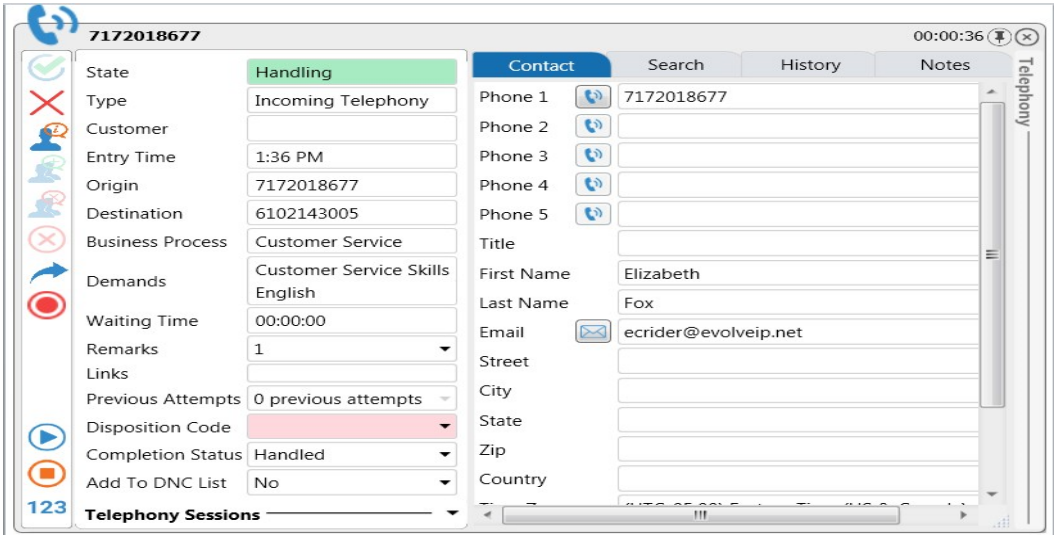
The table below describes the different Agent Client Interaction Bar items:

Item	Description
	Agent ACD State - Click the drop-down and select one of the ACD states that appear in the drop-down.
	Agent Name Indicator – displays the name of the agent using the Agent Client. For example: if other terminal/extension is selected/configured then the name will be Mark@<extension>

Item	Description
  	The **Interaction Bar** provides the following details about the current interaction: **Media Type** (icon changes accordingly for email, chat, or voice interactions). **Caller ID**- The number or name of the customer.  **Interaction Handling Time** (i.e. from the time the interaction was answered up until the time it ended). **Default** command button provides agents with a quick access button that will answer or end the interaction. The Interaction Bar changes its background color to green or red/pink depending on the command performed. If the **Interaction Panel** is closed, click the Interaction Bar to open it. The Interaction Bar may display more than one interaction at a time, depending on how many interactions you are set to handle.
	Unmute / Mute Command is used to prevent the other party (or parties for conference calls) from hearing your voice.
	**New Call Command Menu** is used to perform new outgoing calls. You can call other contact center personnel or other numbers from your call history.
	**Settings Command Menu** is used to define settings that relate to the Agent Client appearance and behavior.

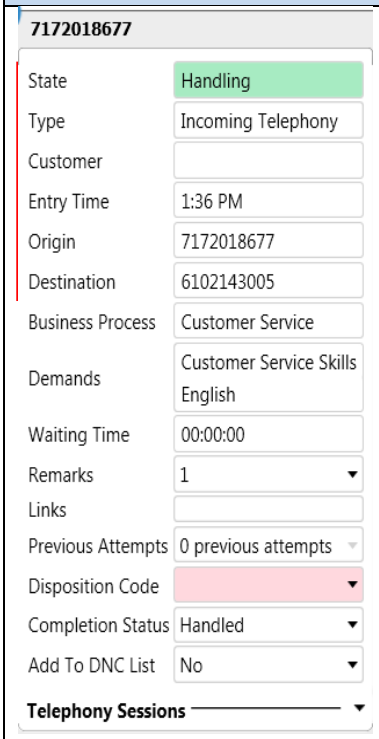
Item	Description
1:58 PM	**Multi Time Zone Command** - this indicates the agent's current local time. Mouse-over the time, the agent's time zone is displayed as follows:  The time is displayed in the format HH:MM AM/PM Agents can change their time zone by clicking the time.
	Toggle between docking and undocking the Agent Client. Click this icon once to move the Client to the top of your desktop (Client is stretched out from left to right). The icon changes to . Click this icon to undock the Agent Client, the Client returns to its previus size and location.
	Minimize the Agent Client to Taskbar. The Agent Client minimized icon ( ) appears in the bottom right of your taskbar. Click to display the Client again. Clicking it a second time minimizes the Client.
	Close the Agent Client.

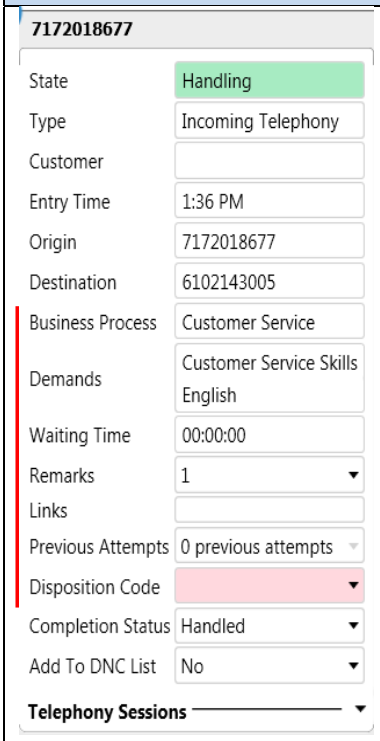
The **Interaction Panel** will dynamically change according to the type of interaction to present relevant information.

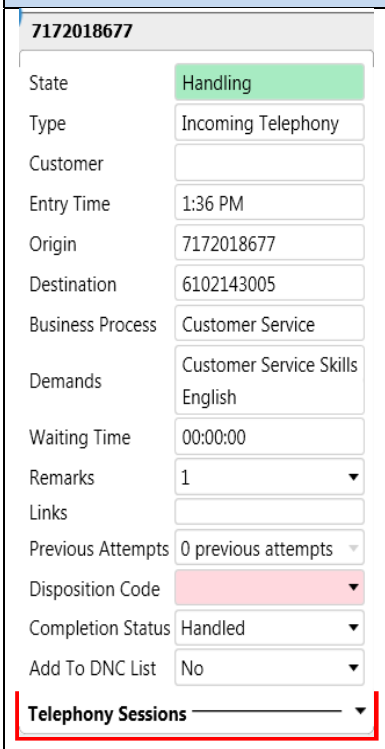
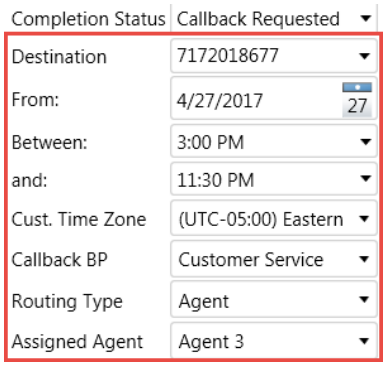


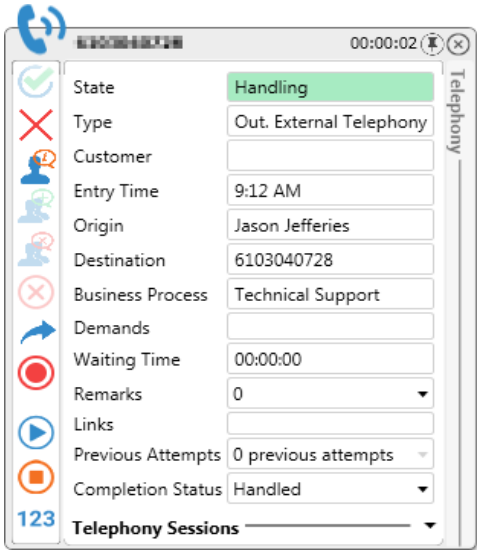
Interaction Panel

The table below describes the different Interaction Panel items:

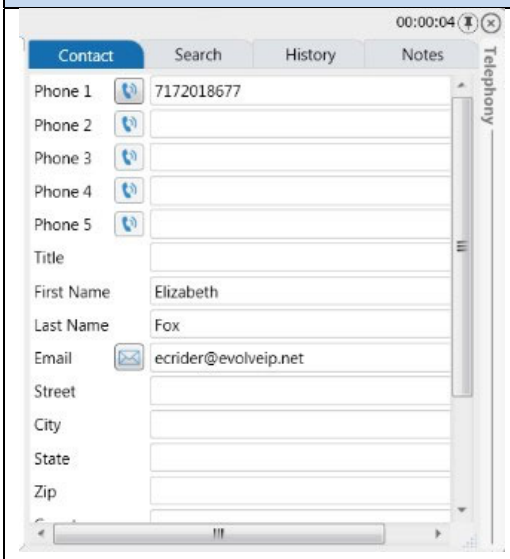
Item	Description
	**State** – specifies the interaction state (e.g. New Interaction, Handling, Wrap Up, etc.). **Type** – specifies the current interaction type (e.g. Incoming Telephony, Fax, Email, etc.). **Customer** – the customer's name will autofill; if no data was defined in the configuration, this field will remain blank. **Entry Time** – the time the interaction entered the Business Process. **Origin** – where the interaction originates from (e.g. the interaction phone number; email address or name for chat interactions (incoming interactions). **Destination** – for incoming telephony it displays the number the customer called. For outgoing telephony it displays the number the agent called.

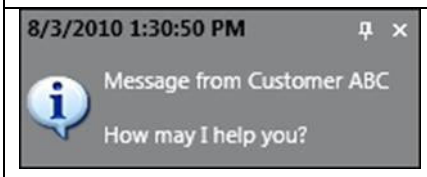
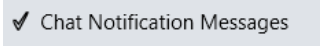
Item	Description
	**Business Process** – the Business Process the interaction is in. **Demands** – if any demands were set in the interaction handling flow (e.g. Language demands for incoming telephony). **Waiting Time** – duration of time the customer waited before an agent answered the call. **Remarks** – agents may enter remarks or read remarks in this panel. Click Add Remark to add the remark. **Links** – those looking to integrate with a CRM or internal knowledge base, which contains specific information about the customer or help documents, will be able to insert a URL into this field. Agents will then be able to click on that link and be redirected to that particular page, providing more detailed information on the person they are working with or help documentation. **Previous Attempts** – any previous attempts made to reach this customer will be displayed here (relevant only for dialer campaign and callback interactions). **Disposition Code** – Agents selects a disposition code from a pre-defined list to indicate the outcome of the interaction.

Item	Description
	**Completion Status** – use this panel to enter how an interaction ended. Select a wrap-up reason from the drop-down. For Example: Callback Requested; Busy Tone; No Answer, etc. Selecting the **Callback Requested** option will open additional fields. *Refer to section 7.2 for additional information on callbacks*  **Telephony Session Panel** – provides information on the current interaction such as who is calling, how long you have been on the current interaction, you can also place a call on hold or disconnect a call.

Item	Description
	Click the **Settings** icon and make sure that ✓ Popup Interaction is checked. This displays the Interaction panel when a new interaction arrives. Clicking the Interaction Bar opens the interaction information panel. Accept an incoming interaction Disconnect/end an interaction Perform a consult call Perform a conference call End a conference call Transfer/pass an interaction Stop playing the sound file DTMF keyboard – touchtone pad if needing to dial a number through an Auto Attendant 123

Item	Description

	The **Contact Manager** (left) is a sidebar at the right of the Interaction Panel. It displays the incoming caller's information that is tied back to the Agent Client's built in CRM.
	• **Contact Tab**– disaplays the contacts information
	• **Search Tab**– Search for contacts
	• **Historay Tab**– Displays the caller's history with the call center.
	  ○ Start Time
	  ○ End Time
	  ○ Interaction Type
	  ○ Origin
	  ○ Destination
	  ○ Status
	  ○ Talk Time
	  ○ Agent
	  ○ Disposition
	  ○ Last Business Process
	• **Notes Tab**– Any notes added by agent during interaction with customer

	When the Agent Client is minimized incoming interactions appear as messages at the bottom right corner of the screen. These messages display the customer's name and show a preview of the message contents. Note: To activate chat notification messages, make sure you select the  feature from the Settings Command Menu

2.2 System Messages

The Agent Client will alert when actions have failed and provide a system message to each event.

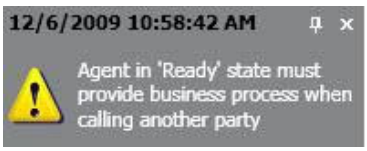
The following system messages exist:

- - Error
- - Warning
- - Information

All messages are displayed for five seconds. While a message is displayed, you can:

- to close the message.
- to pin the message to the desktop. This will help to keep the error message open so your IT department can capture the error.

System Messages are displayed in the bottom right corner of the screen.



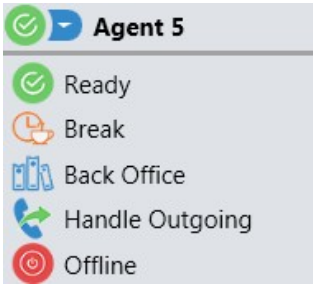
System Warning Message

2.3 ACD States

The Agent Client allows you to choose one of the following ACD states:

Ready	Agent is available to receive and initiate interactions.
Break	Agent is taking a break. While in break mode agents may still open sessions and accept interactions from other agents. The agent will not be offered Business Process interactions.
Back Office	Agent is performing back office duties. The agent client will also go into back office when a non-acd call is placed or

	received.
Handle Outgoing	Agent is handling an outgoing interaction (e.g agents can initiate interactions from a Business Process and will not receive another incoming interaction until they've completed their outgoing interaction). Agents cannot initiate an outgoing call to another Business Process or Channel and receive an error message unless in Ready, Backoffice or Handle Outgoing state.
Offline	Agent is signed-out of the ACD and will not receive or initiate any interactions. This terminates the agents shift and resets all agent related statistics.
Wrap Up	When an Agent completes an interaction, this will be the time allotted to complete work that is directly associated with the interaction.



ACD States

2.3.1 Automatic States

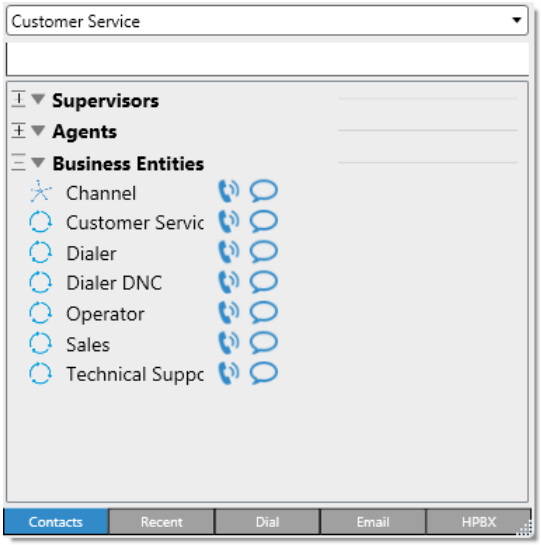
The Agent Client has the following two automatic states.

No Answer -	**No Answer** state icon is displayed when an agent did not answer an incoming call, nor rejected it after the predefined period elapsed. Agents will be considered in 'No Answer' mode up until they manually change the mode back to one of the available modes (Break, Back Office or Handling Outgoing).
Busy -	**Busy** state icon is displayed as soon as an agent accepts an

	incoming\ interaction. Agents will be considered in busy mode until they end/close the interaction by clicking the X

2.3.2 New Command Menu

The New Call Command Menu is found in the Agent Client. Clicking it opens a window and enables agents to start new interactions using different options.



The following tabs are available:

- **Dial Drop Down** – Allows the agent to select which caller ID to out-pulse when making an outbound call.

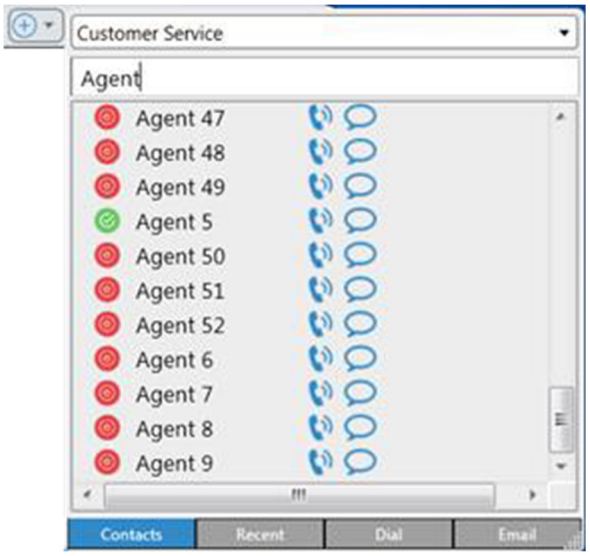
- **Contacts** - (e.g., supervisors, agents, Business Entities Business Processes and Channel). The Contacts tab displays the different agent/supervisor availability modes.

	contact is currently ready
	contact is currently offline

- **Recent** – contacts you recently interacted with (inbound and outbound calls)
- **Dial** - manually dial using the dial pad.
- **Email** – allows you to create a new email for one of the Business Processes you are assigned to.
- **Directory** – contacts within your entire organization (corporate directory)

2.3.3 Contacts Tab

The Contacts tab consists of an organization's contacts including agents, supervisors, business processes or channels. You can easily initiate and transfer interactions of different media types, such as voice calls, chats and emails.



New Call Command on the Agent Client

To use the Contacts Tab:

1. Click.

2. Select the Contacts tab at the bottom of the panel.

3. Select the relevant Business Process from the BP drop-down, if you are assigned to more than one Business Process.

4. Enter a supervisor or agent name in the Search box. A filtered list of names closest to what you have typed in the search box appears (e.g. if you type the letter 'J' in the search box, the list will display only those names that contain the letter 'J' in them). You can alternately scroll down the list and find the person, BP or channel you want to call.

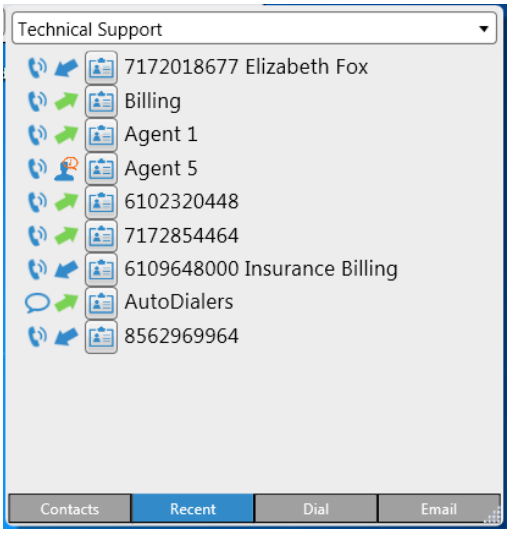
5. To initiate an interaction with a contact, click the call icon in the Action panel.

6. To chat with an agent, click the chat icon in the Action panel.

	Note: Chatting and initiating calls depends on your Role and Load Allowance in the system.

2.3.4 Recent Tab

The Recent tab allows you to quickly interact with recent contacts (both incoming and outbound interactions).



Recent Tab

To use the Recent tab:

1. Click .

2. Select the Recent tab at the bottom of the panel. The Recent tab displays each contact you previously interacted with:

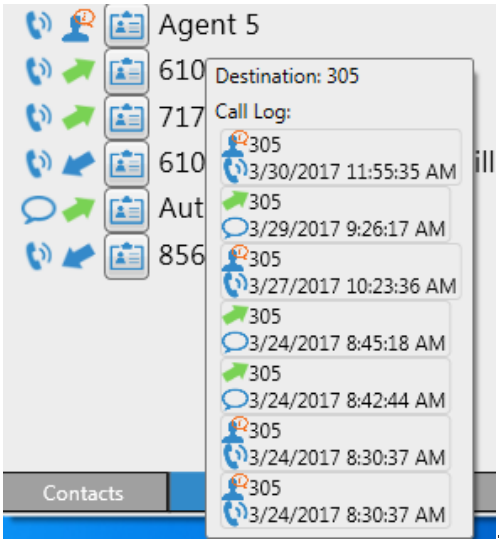
	indicates outgoing calls made
	indicates incoming calls made
	indicates a consult with another supervisor or agent
	indicates the interaction was a phone call
	indicates the interaction was a chat conversation

3. Select the relevant Business Process from the BP drop-down, if you are assigned to more than one Business Process. Selecting the BP will outpule the outbound callerID associated with the Business Process.

4. To initiate an interaction with a contact, click the call icon in the Action panel.

5. To chat with an agent, click the chat icon in the Action panel. This is only available for internal chats between agents.

6. To display the interaction logs of a specific contact, hover over the user's name/telephone number.



2.3.5 Dial Tab

The Dial Tab allows you to enter a phone number and place a call.

Dial Pad

To use the Dial Tab:

1. Click

2. Select the Dial tab at the bottom of the panel.

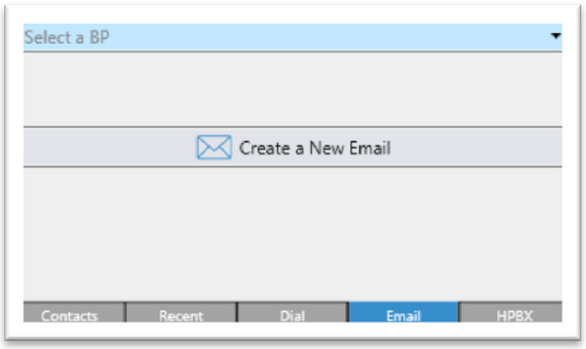
3. Select the relevant Business Process.

4. Use the Dial Tab to enter a phone number, use your keyboard, or paste a number.

5. Click to place the call.

2.3.6 Email Tab

The Email tab allows you to create a new email for the Business Process that you are assigned.



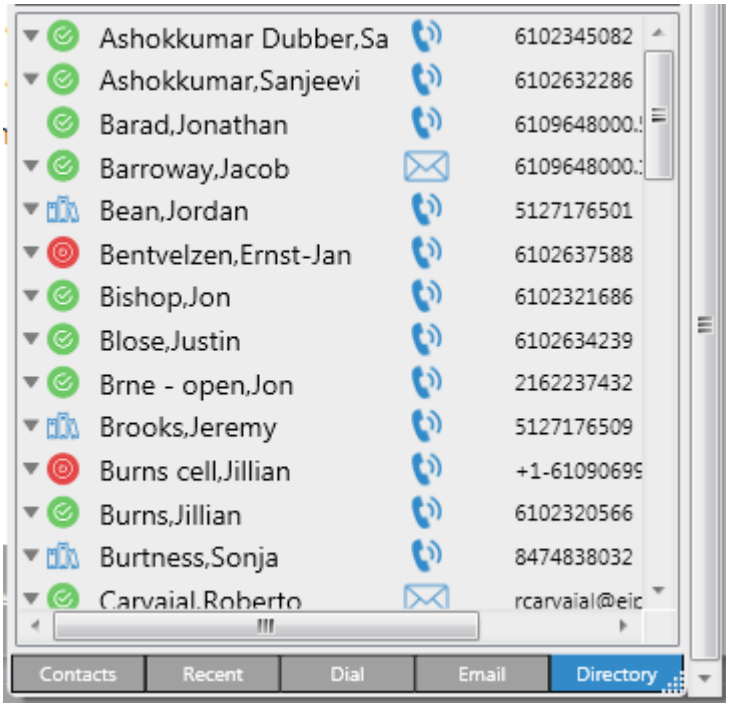
Email Tab

To use the Email tab:

1. Click .
2. Select the Email tab at the bottom of the panel.
3. You will need to select a Business Process, from the list of available options and then click on **Create a New Email**.

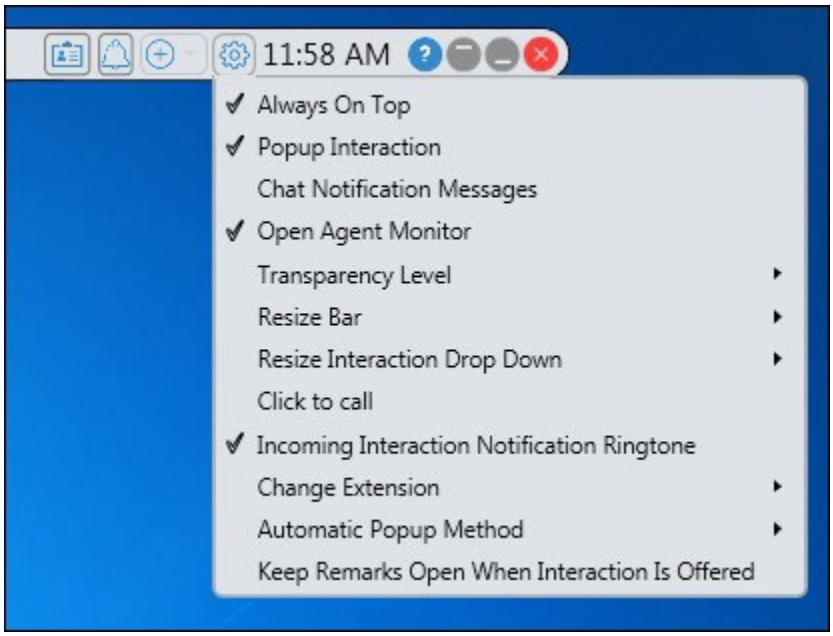
2.3.7 Directory Tab

The HPBX Tab will allow you to view all users within your organization, whether they are part of the contact center or not. The tab will provide presence for each user, to help determine whether they are available or unavailable to interact with you or a customer. Click to expand a contact and view all available numbers.



2.4 Settings Command Menu

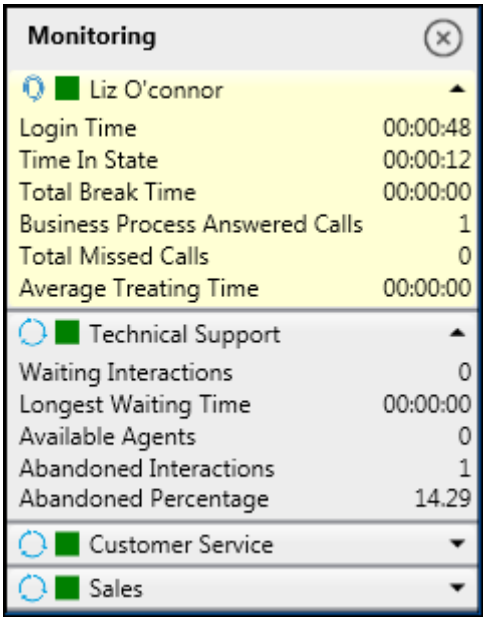
The Settings Command Menu is found in the Evolve Contact Suite Agent Client and is used by agents to define appearance and behavior, resize the Agent Client as well as change its transparency.



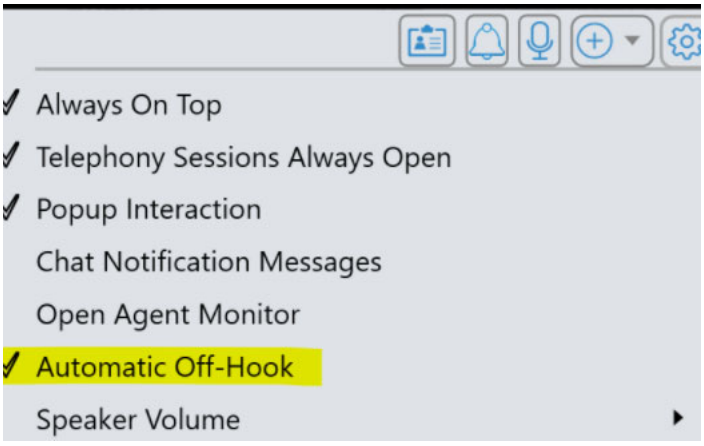
Settings Command Menu

The following commands are available from the drop-down menu:

- **Always on Top** - displays the Agent Client on top of all active windows
- **Pop-up Interaction** - displays the Interaction panel when a new interaction arrives
- **Chat Notification Messages** – displays a popup message at the bottom right of the screen every time a chat message arrives. Activating this option helps those agents that multitask (i.e. handle more than one interaction at a time or use another application other than the Agent Client)
- **Open Agent Monitor** – displays the Agent Monitoring panel at the bottom right of the screen.



- **Automatic Off-Hook** – the system selects the primary or secondary device to be used for HPBX devices. The secondary device is the default setting, and Agents can switch between devices as they move to different locations.



- **Speaker Volume** – by moving the slide indicator, you can adjust the volume level for speakers attached to the agent's computer
- **Microphone Volume** – by moving the slide indicator, you can adjust the volume level for an agent's microphone
- **Speaker and Microphone Settings** – the system automatically selects the audio devices. If other devices are available, you can change the selected speaker or microphone by choosing a device from the list
- **Transparency Level** - change the transparency of the Client
- **Resize Bar** – increases or decreases the size of your Evolve Contact Suite Agent Client and interaction panel (font size is also increased accordingly)
- **Change Extension** - change your current extension, by selecting from a list of pre-defined extensions or manually enter a new extension.

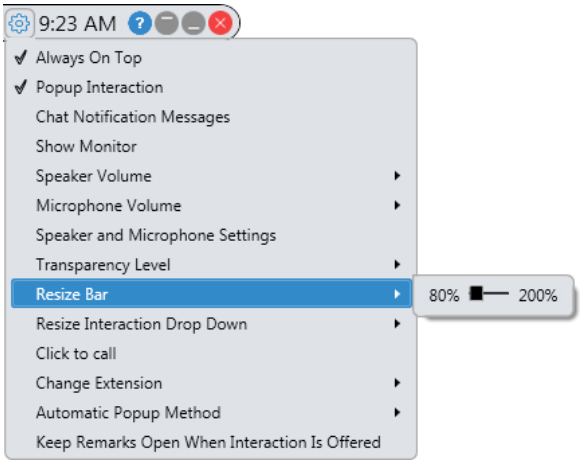
- **Keep Remarks Open When Interaction is Offered** – if a remark is passed to the agent through the call flow, this will keep the remark open for the agent to read it.

2.4.1 Resize the Agent Client

This feature will allow you to increase or decrease the size of your Evolve Contact Suite Agent Client. You may also widen the Evolve Contact Agent by dragging and stretching out the handle.

To resize the Agent Client :

1. Click . The Setup drop-down menu opens.
2. Mouse-over 'Resize'. The size slider appears.
3. Drag the slider (either left or right) to set the desired size of your Evolve Contact Agent.



Resize Slider

4. Click anywhere outside the setup menu to save your settings and close the setup menu.

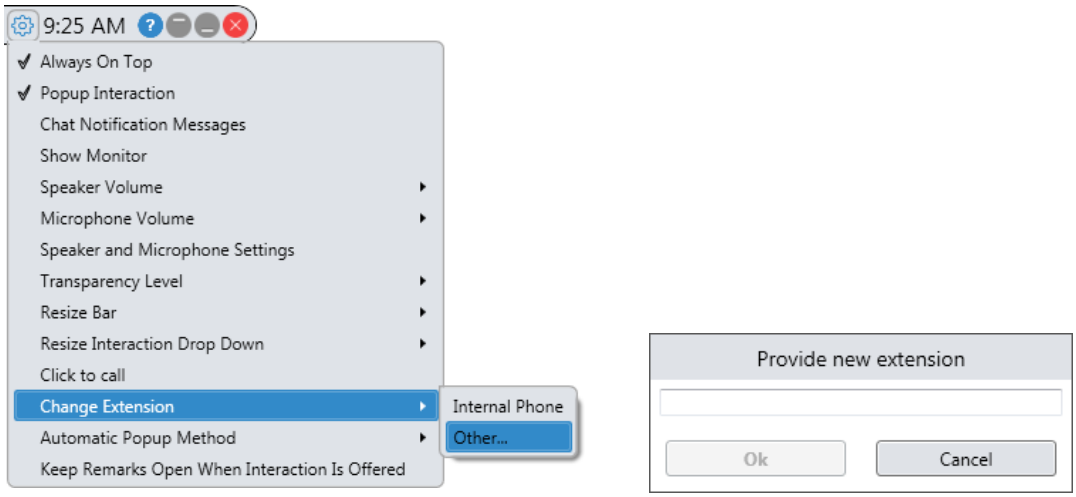
2.4.2 Change Extension

Changing an extension or where to answer a call is useful when you wish to receive incoming voice interactions at an alternate location such as a personal telephone.

To change extension number:

1. Click the Settings command menu is displayed.

2. Mouse-over **Change Extension**
3. Click **Other…** to define a new DID or extension that has not yet been set. The provide new extension window opens. If a pre-defined list of extension numbers exists, then you may select one.



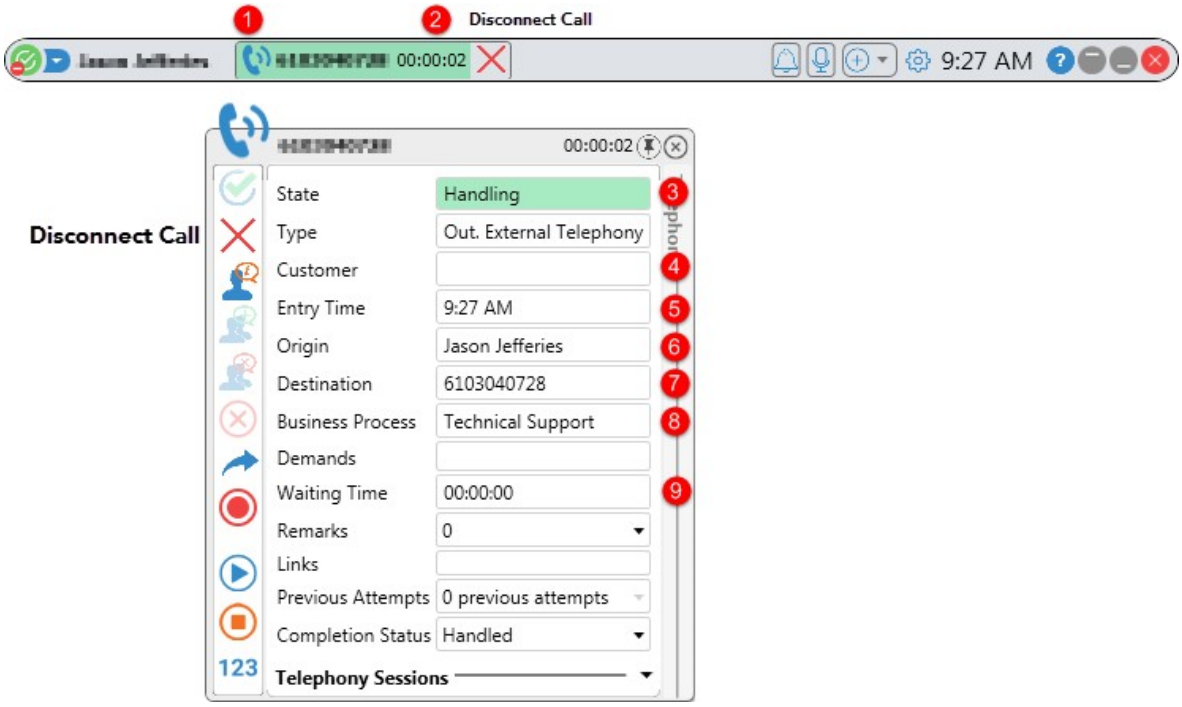
Provide New Extension Window

4. Enter a new extension number or any other telephone number in the 'Provide new extension' window.
5. Click **OK** to save your settings. The newly created extension number is now displayed alongside the Agent's name in the Client.

3. Voice Interactions

Incoming calls may arrive from an external source such as customers or internally from within the organization.

The Evolve Contact Suite Agent Client and the Interaction Panel display specific call details.



Available Information for a Voice Call

The table below describes the available information for Voice Interactions:

Number	Description
1	**Incoming Interaction Indicator** -Shows the type of interaction being offered to the agent. The following interaction indicator icons exist: • - Incoming voice telephony • - Incoming email • - Incoming chat
2	**Call Elapsed Time** -Shows the call elapsed time.
3	**Interaction State** -Indicates the state of the interaction (e.g. Wrap-up)
4	**Customer** -Shows the customer name if defined in the system.

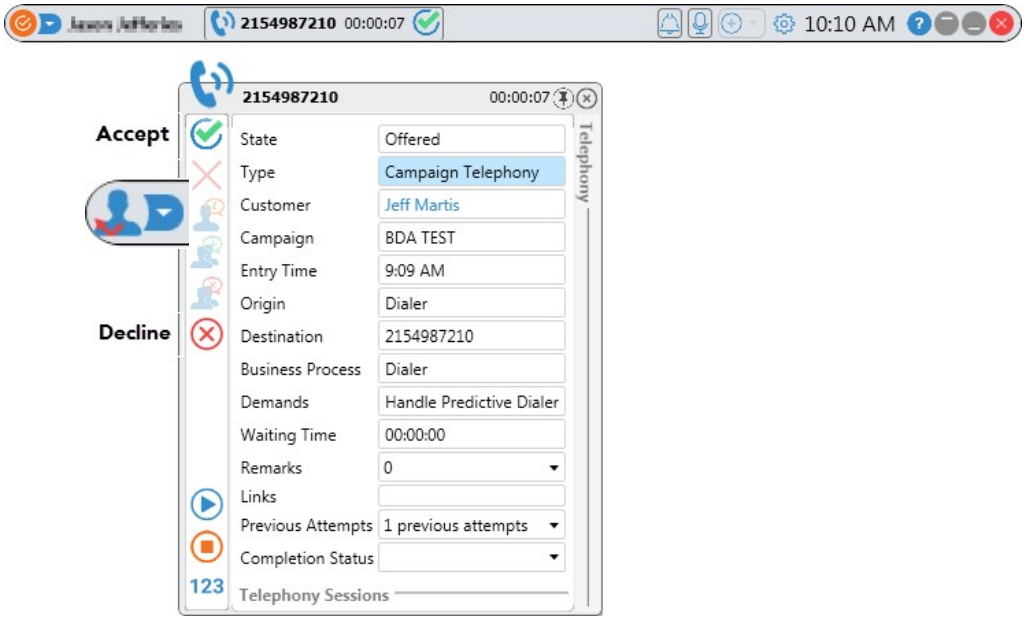
Number	Description
5	**Entry Time** -Shows the time the call reached the call center.
6	**Origin -**Shows the customer's phone number (for external calls) or an agent/supervisor extension (for internal calls). The corresponding Origin label is also displayed on the Information panel. If it is a callback, the Origin label shows the agent/supervisor end point number (for external calls) or the customer's phone number (if the origin of the call is within the system).
7	**Destination** -The number the customer called when calling the Contact Center (for incoming telephony) or the number the agent called (for outgoing telephony).
8	**Business Process** -Specifies the Business Process through which the call was routed.
9	**Waiting Time** -Shows the time the call was waiting before it was answered.

If agents are 'busy' i.e. they are currently handling 'business' interactions, they may receive incoming 'private' interactions or initiate other calls while placing the other party on hold.

3.1 Incoming Calls

When a call is offered, the Agent is immediately presented with several items…

The Information Panel will open and display information about the incoming call. Agents will have the ability to either accept or decline that call, depending on your implementation, you may also answer on your handset or other Evolve IP provided software.



Incoming Call Details

When the call has been accepted the Incoming Interaction indicator background turns green (indicating an active voice interaction) and is useful when agents are handling more than one interaction as they can easily identify which interaction is the active one.

The customer phone number is displayed (for external calls) or an agent/supervisor's name (for internal calls). The Telephone icon is displayed indicating it is a voice interaction. For Agents with a unified softphone, a direct call to the Agent extension, not from the customer or internal, also displays a notification. If agent accepts the call, the Agent state will automatically change to Back Office.

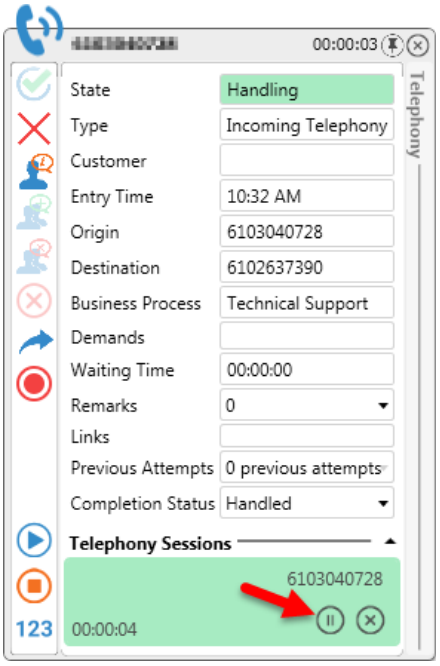
If an agent does not accept or reject an offered interaction after a set period, the interaction is routed back to the Business Process, which automatically changes the agent's state to 'No Answer' (agent won't be able to receive additional calls until changing the state back to 'Ready'). If an agent declines the interaction their status remains the same.

3.2 Place a Call on Hold

Placing a call on hold allows you to make another call or to answer a call from someone else. You can leave a call on hold indefinitely or until the other person hangs up.

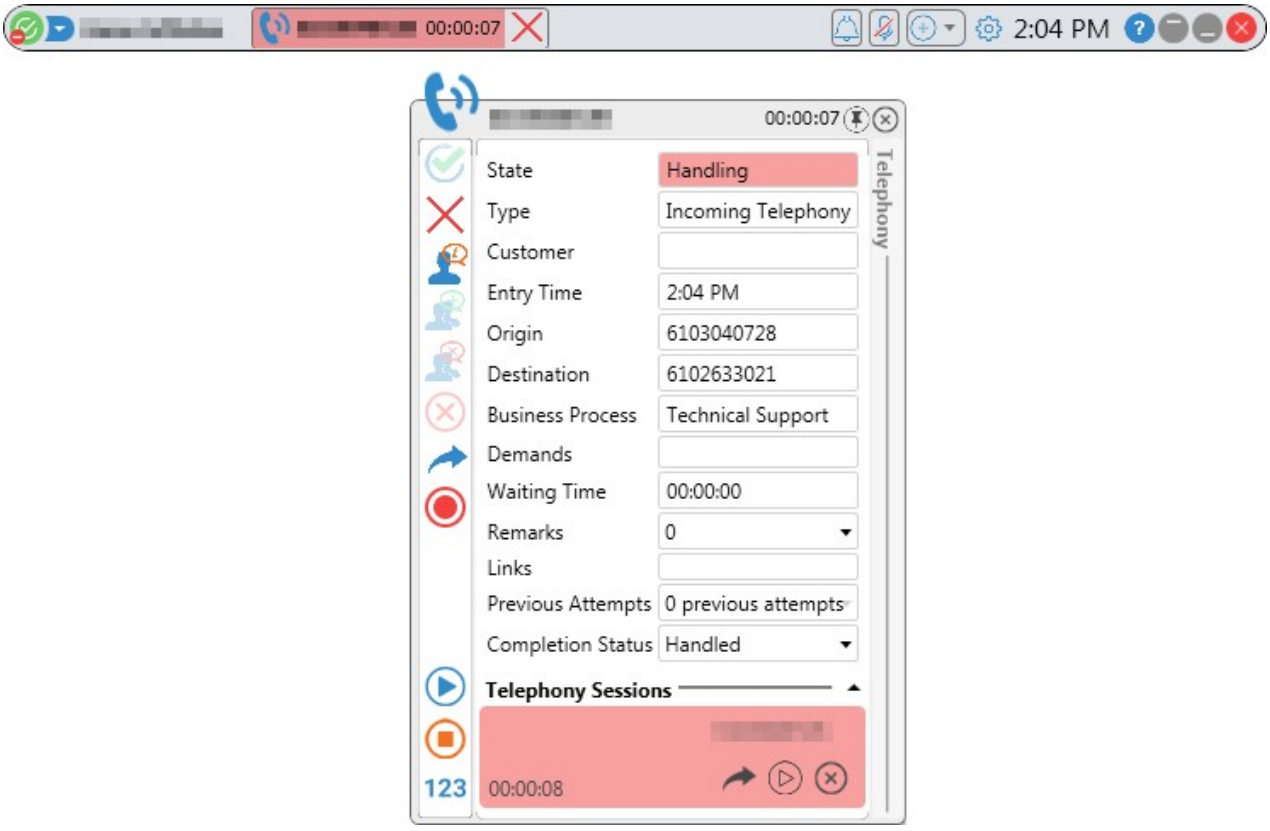
To place a call on hold:

1. Select the Telephony Session drop down arrow. Click the hold icon in the Telephony Session panel. Performing this action will change the background color to pink. (Depending on the 'hold' settings, customers may or may not hear music).



While on hold the customer will not be able to hear the agent.

During a consulted interaction, there are two session panels - one on hold with a pink background and the other active with a green background. The Client interaction bar will be green, but the Telephony Session panel with a call on hold will be pink.



Call on Hold

2. Click to resume the call.

	Performing a consulted transer may only be performed when there are two session panels open (i.e. only if you are consulting with another agent). The attended transfer command cannot be performed with only one session panel open.

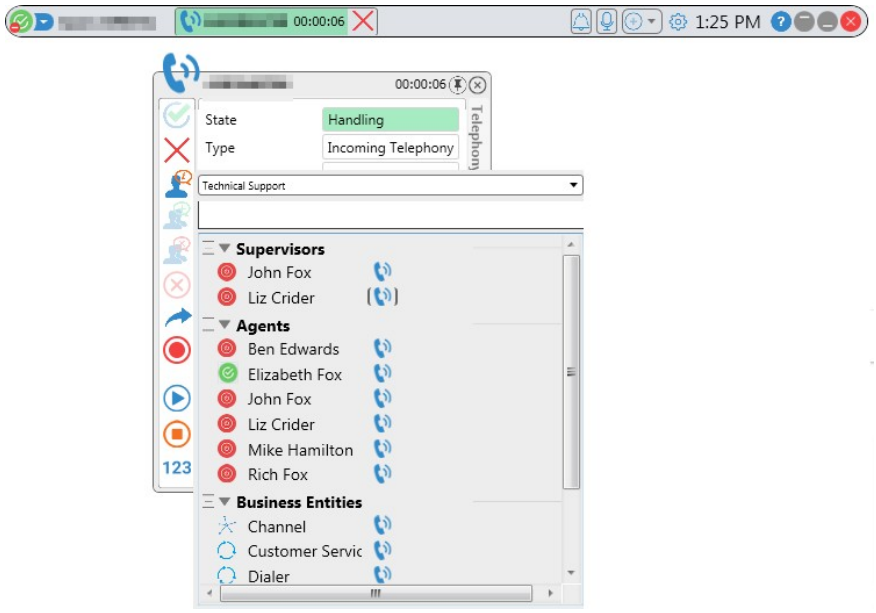
3.3 Consult Call

A Consult Call allows you to call another agent or supervisor for consultation, while placing the customer on hold. While the consult call is active, the customer waits on hold and cannot hear the conversation.

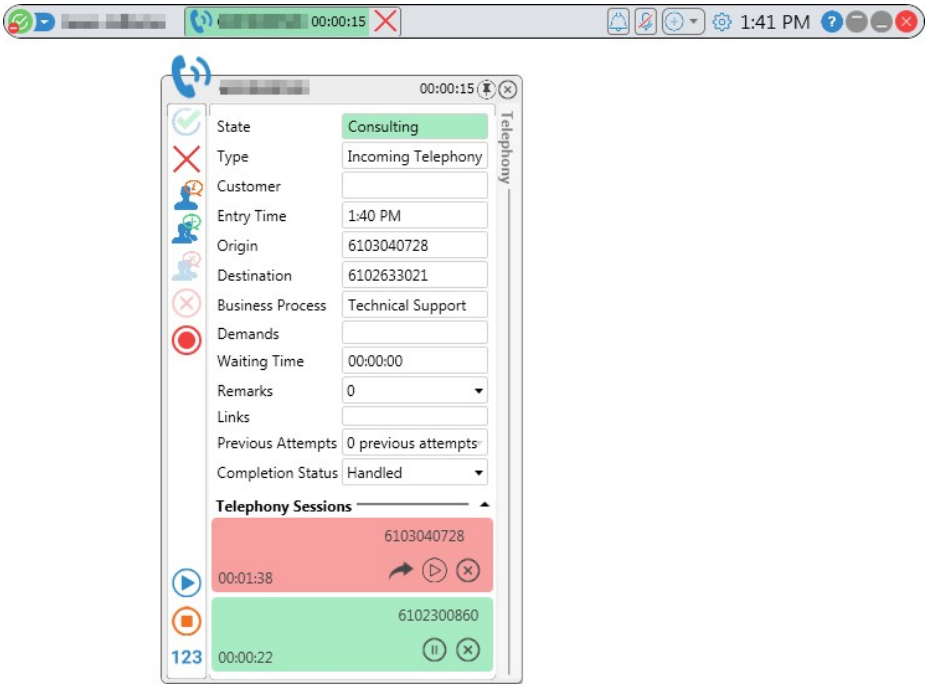
Initiate a consult call:

1. During a voice interaction, click . The contacts opens.

2. Select the contact you want to consult with, by clicking to call the desired contact for consultation and once the call is answered the following Session panels are displayed.



Initiating a Consult Call



Consult Call in Progress

As the Consult Call initiator, you can:

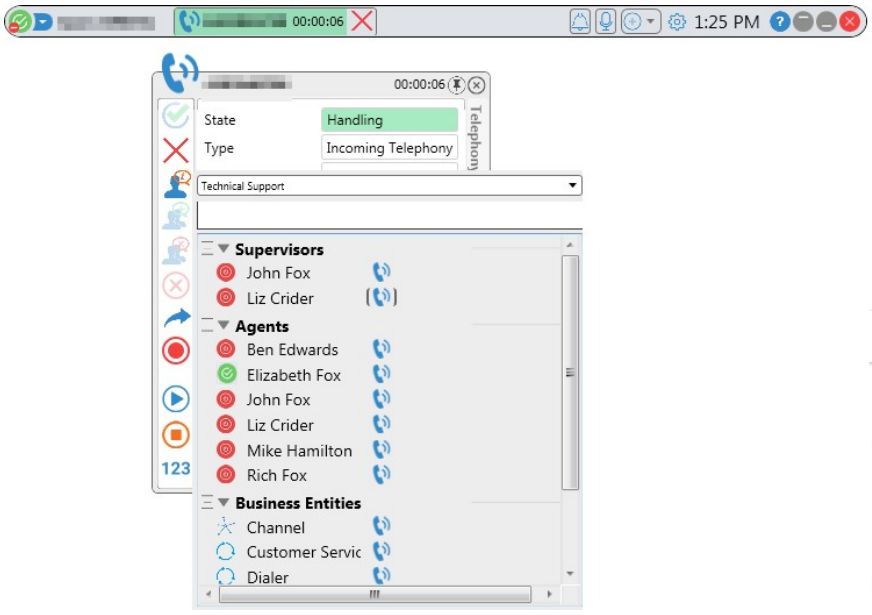
- Record the call , place the customer on hold or end the interaction using the Customer panel.
- Transfer the call to the contact you are consulting with by clicking in the Telephony Session panel. When there are two session panels open (like in the above image, the interaction may be transferred)
- Initiate a Conference call.

3.4 Consulted Transfer a Call

A Consulted Transfer allows you to consults with whomever the call is going to be transferred to before actually passing on the call. The consulted transfer is performed by agents while the customer waits on hold.

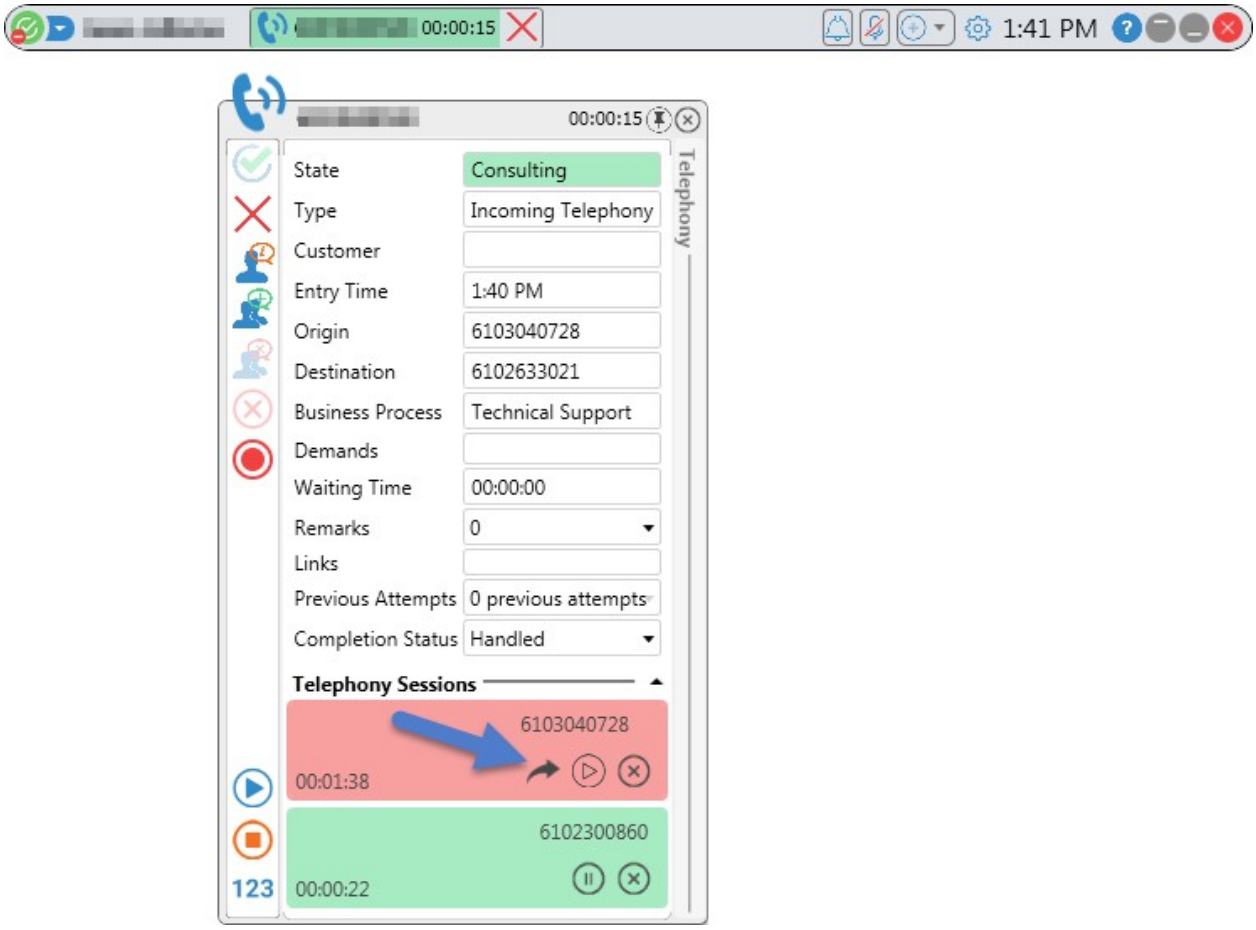
To use the Consulted Call Transfer option:

1. Click on the Consult icon
2. Select the person you are looking to transfer the call to and click



3. This will place the caller on hold and dial the person you have selected.

4. Once you have confirmed the person is available, click on the Telephony Sessions Panel to transfer the call.

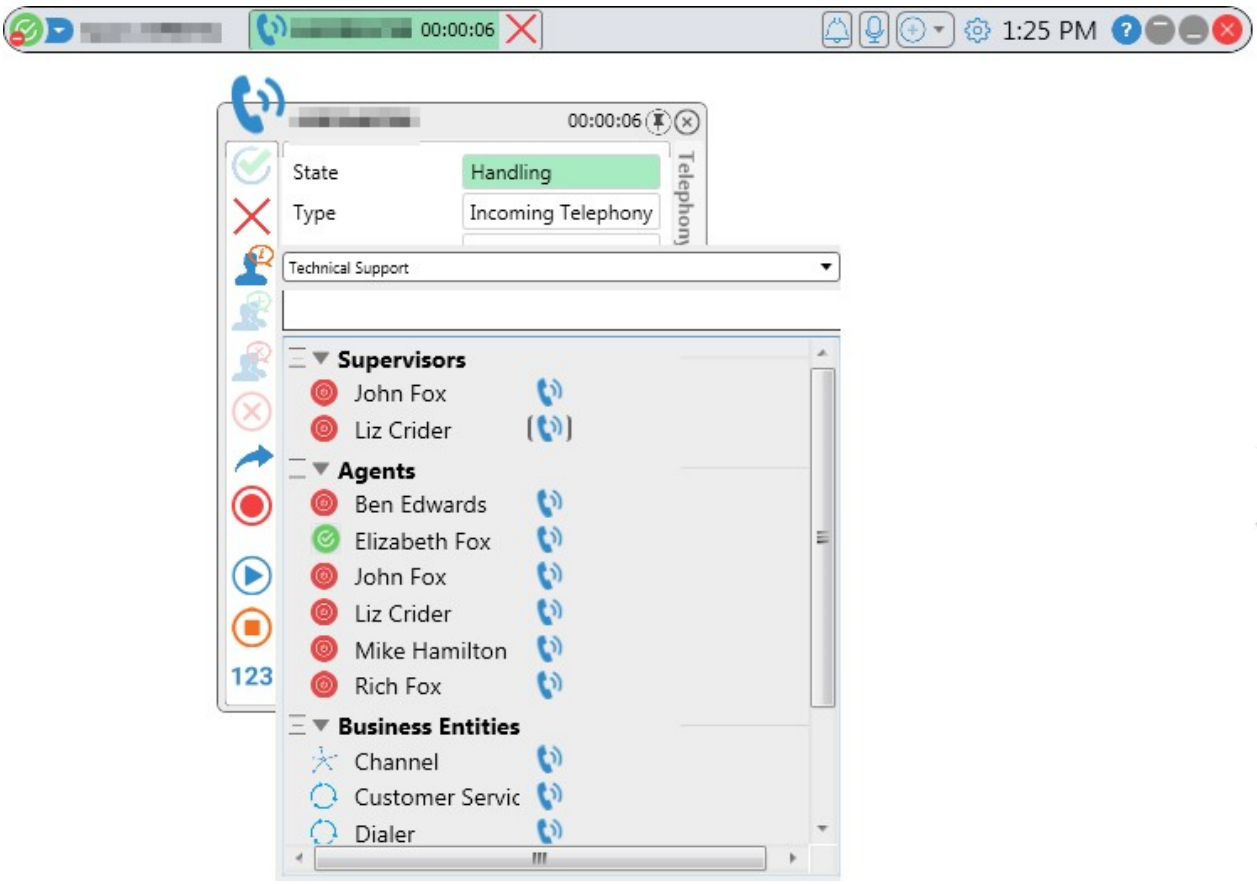


3.5 Blind Transfers (Pass)

You can blind transfer a call to any contact or dialed number without needing to consult with the third party. The call is transferred and the agent that transferred the call hangs up immediately.

To Blind Transfer a call to a contact:

1. Click and select an available agent or supervisor using the Contact Tab and then click the button.



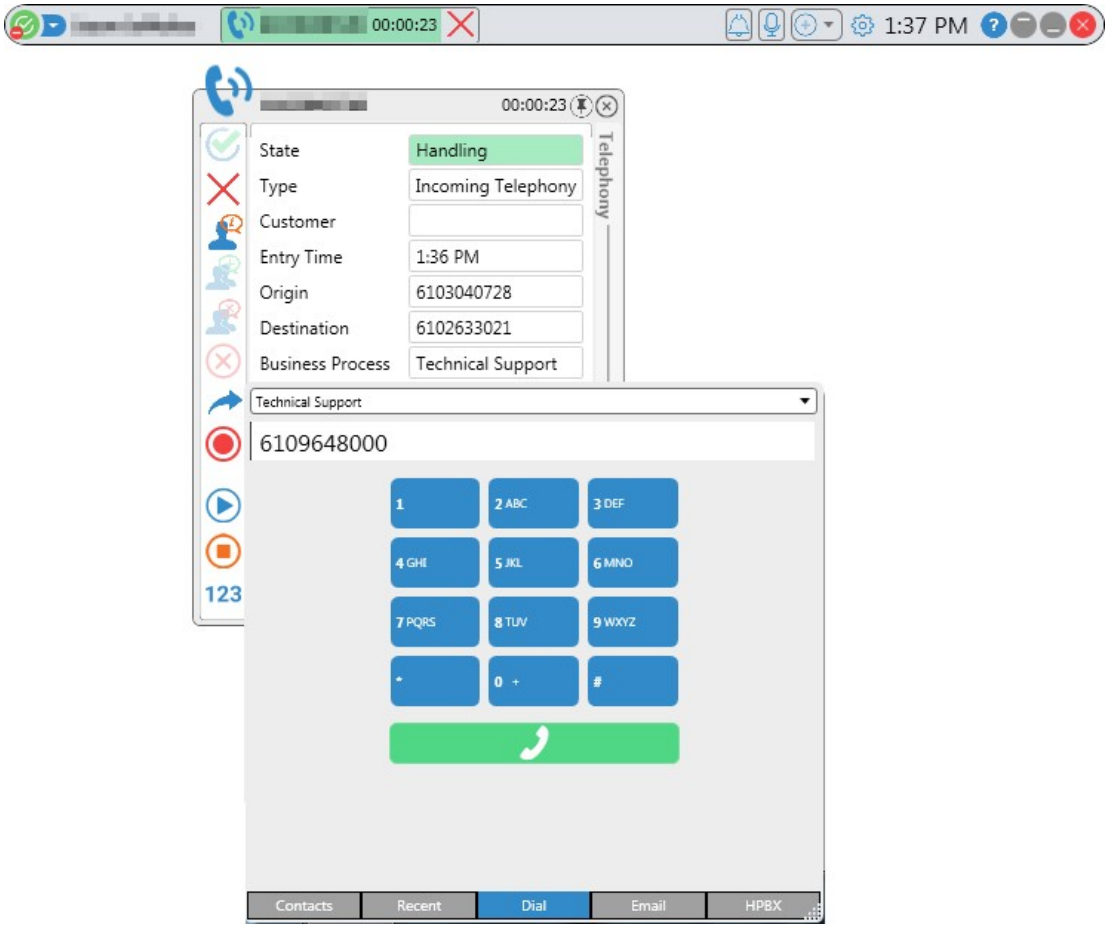
Blind transfer a call to a Contact

2. The interaction is transferred to the contact you selected.

To blind transfer a call to a phone number:

3. Click
4. Click the Dial tab.

5. Enter a phone number and then click . The call is transferred to the phone number you have dialed.



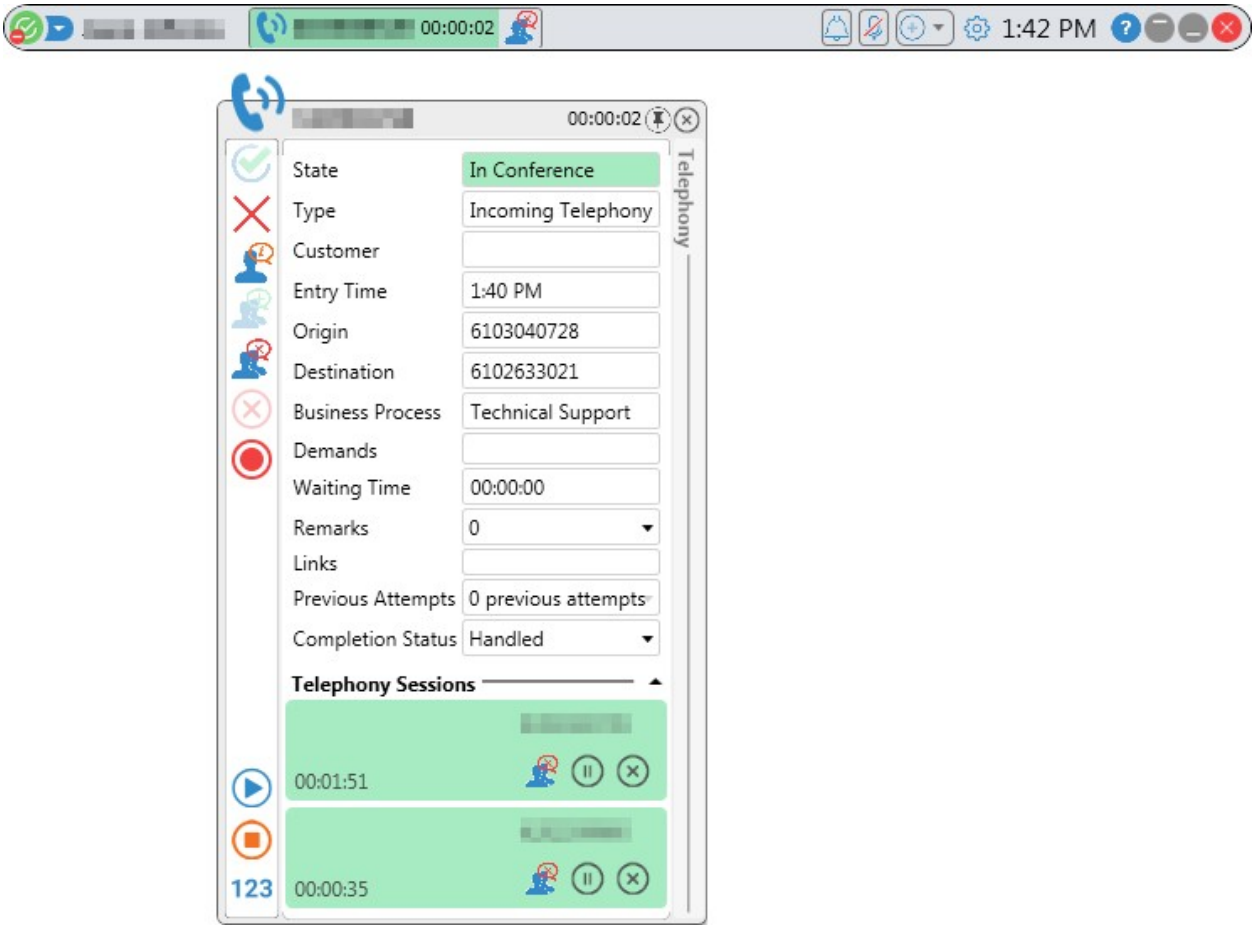
Passing a Call to a Dialed Number

3.6 Conference Call

A conference call is a call in which more than two people such as a customer, an agent and supervisor are joined together on a call. A conference call is available only after initiating a Consult Call, refer to section 3.3 on how to initiate a Consult Call.

To start a conference call:

1. Click



Conference Call in Progress

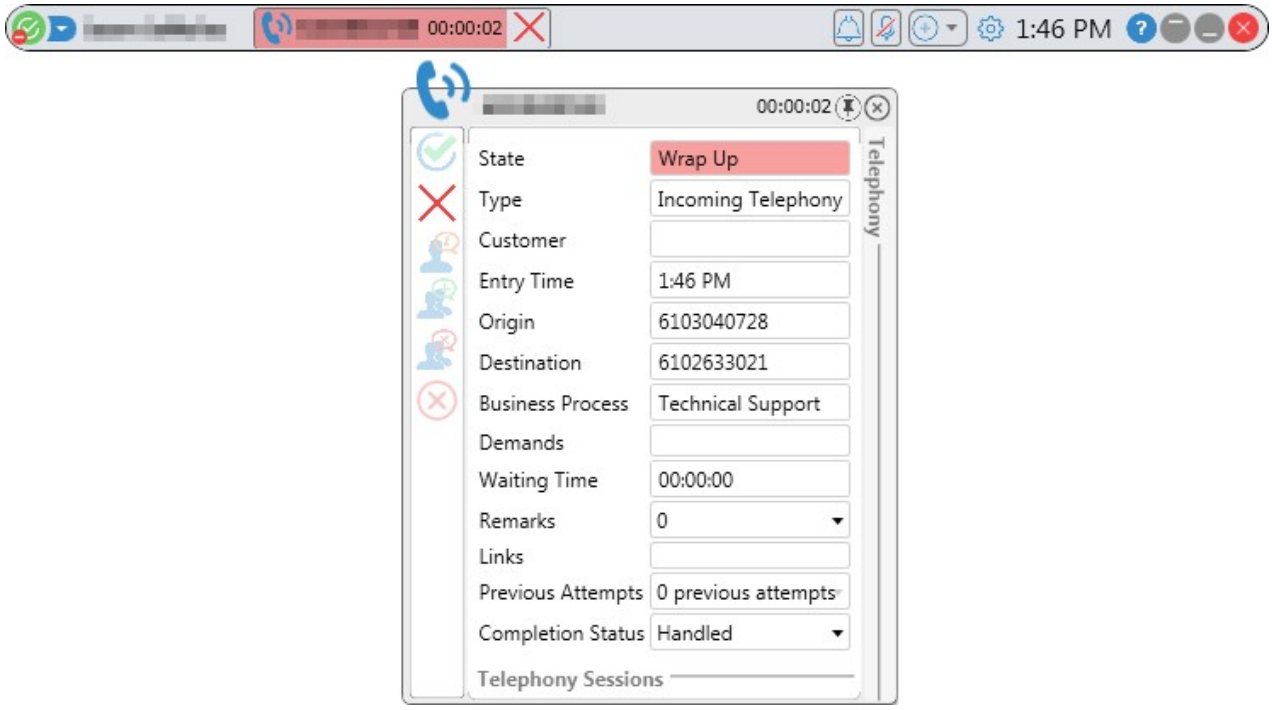
	Note: The Customer panel and Consultant panel are both green indicating that both voice interactions are active and that the agent can hear both parties.

2. Click to remove either party from the conference call.
3. Click to end the Conference Call and resume customer interaction.

3.7 Complete an Interaction

When an agent completes an interaction (and likely moved to Wrap Up), the Interaction Information Panel remains visible allowing agents to perform wrap up tasks and use the interaction data in other applications (e.g. CRM).

	Wrap up starts when either an agent or a customer disconnects an interaction. Wrap up is defined using the Setup application. Organizations can have no wrap up time defined so when an interaction ends the agent returns to the previous mode they were in.



Information Panel Wrap Up State

3.8 Dial Pad

You can use the built-in Dial Pad or your keyboard to enter numbers to emulate touch tones or Dual-Tone Multi Frequency (DTMF) and depending on your implementation, you may also use your handset or other Evolve IP provided software.

The Dial Pad button is located on the bottom left of the interaction information panel and is activated only when agents are busy handling interactions

To use the Dial Pad:

1. Click 123. The Touch Tone Dial Pad opens.
2. Enter the desired number or symbol as required.
3. Click 123 to close the Touch Tone Dial Pad.

Dial Pad (DTMF)

4. Chat Interactions

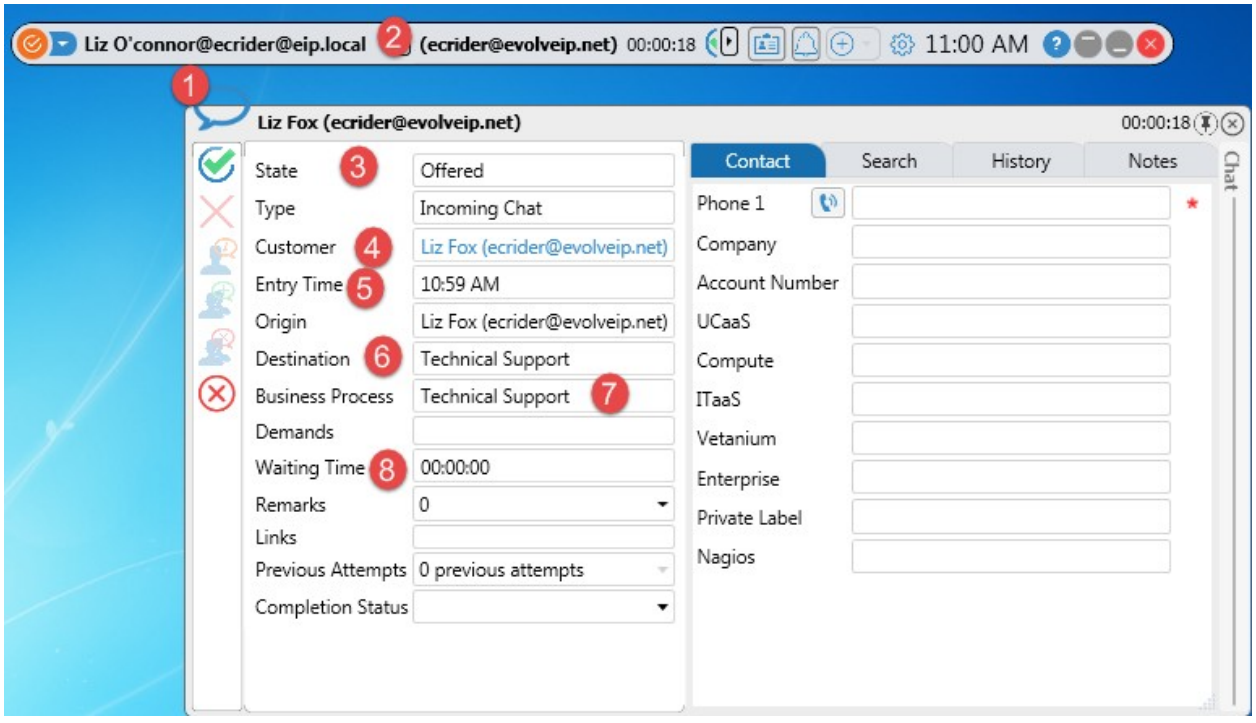
During a chat you can:

- View chat information
- Answer a chat
- Respond to a chat
- Place the chat on hold
- Transfer a chat
- Consulted Chat with Agent or Supervisor
- Add Canned Responses
- Conference Chat
- Save or Print Chat

Viewing Chat Information

The figure below shows the Agent Client Interaction Bar, the Interaction Information Panel and the Sessions Details panel for a chat session.

Chat Interaction Information Panel

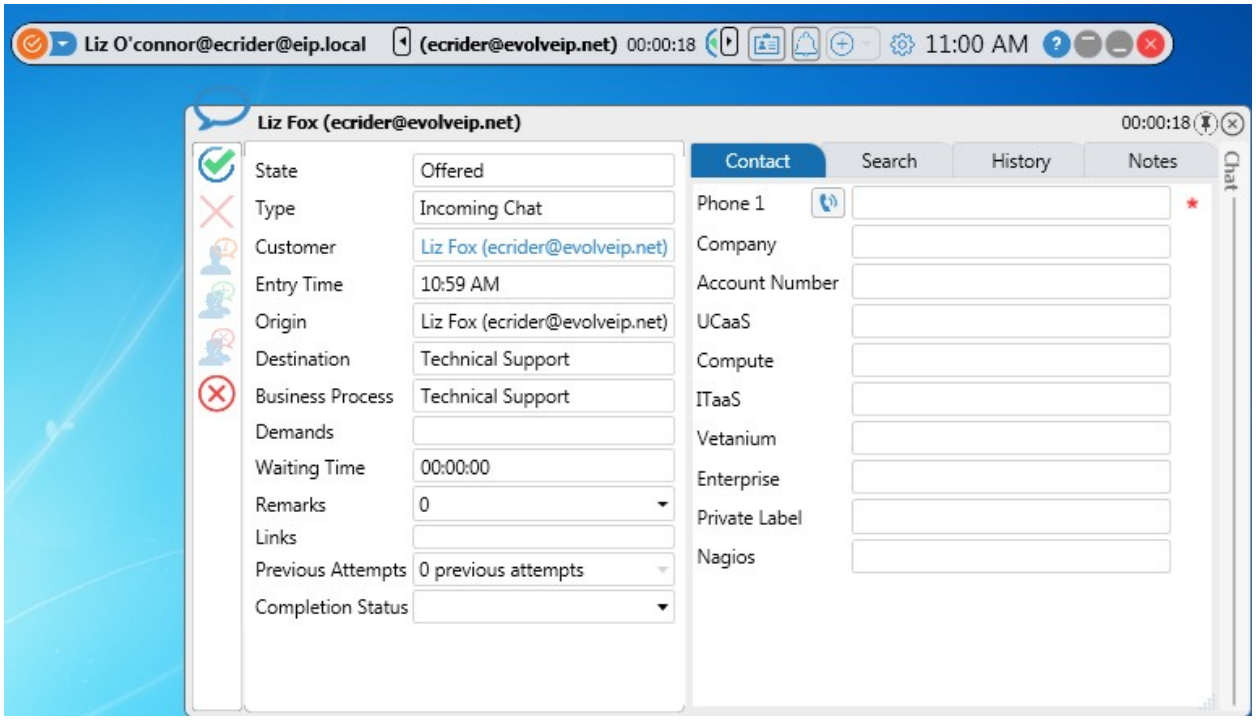


The table below describes the different chat Interaction Information Panel items:

Name	Description
1 - Incoming Interaction Indicator	Shows the Chat icon indicating it is an incoming chat interaction. The icon changes according to the interaction type.
2 - Origin	Shows the username of the chat initiator (for Web chats) or an agent/supervisor number (for internal chats). The corresponding Origin label is also displayed on the Information panel.
3- Interaction State	Indicates the state of the interaction (e.g. handling).
4 – Customer	Shows the customer name as defined in the system.
5 - Entry Time	Shows the time of day the chat reached the Business Process.
6 – Destination	Shows the target call details (e.g. agent's extension).
7 - Business Process	Specifies the Business Process the chat is from.
8 - Waiting Time	Shows the duration of time the chat was waiting before it was answered.

4.1 Answer a Chat

Incoming chat offer may arrive from external sources (for example Web Chats) or internal source (chat requests made by other agents or supervisors). During an incoming chat request the chat icon is displayed indicating it is a chat.



Incoming Chat Details

1. To answer an incoming chat request, click .
2. To reject/decline an incoming chat, click .
3. If an agent does not answer a chat request after a set period, the chat interaction is rerouted back to the Business Process, which automatically changes the agent's mode to 'No Answer' and that agent won't be able to receive additional chats until changing the mode back to 'Ready'.

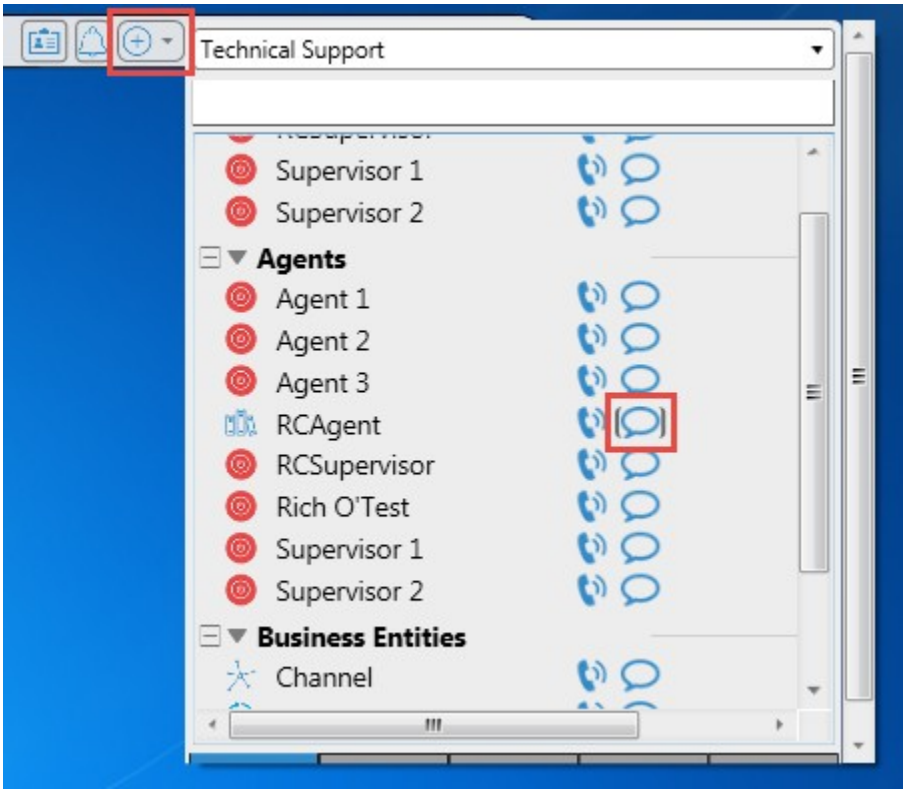
4.2 Respond to a Chat

1. You can chat by typing text in the Chat Session panel that opens to the right of the interaction information panel.

4.3 Chat with another Agent or Supervisor

To start a chat with another agent or supervisor:

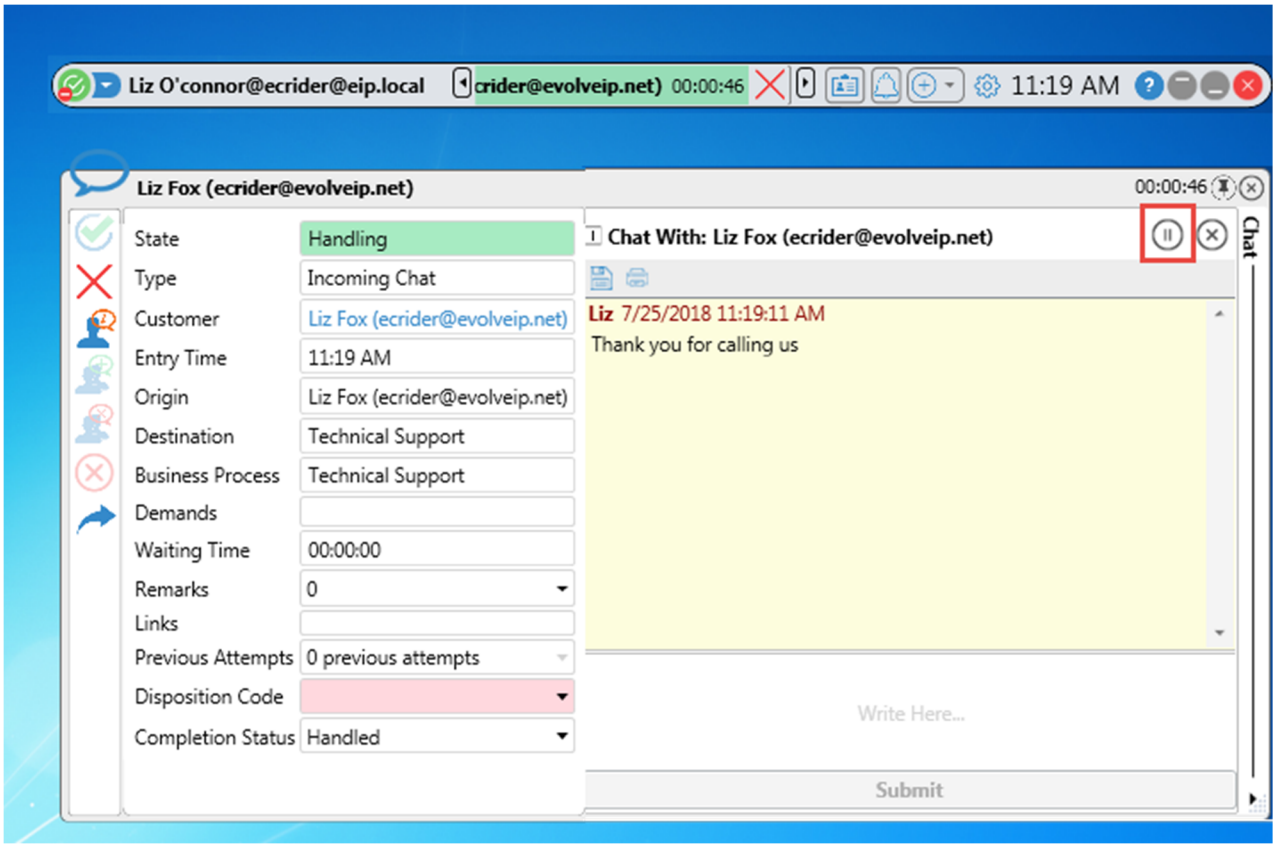
1. Click to open the Phonebook
2. Select a Business Process from the drop-down.
3. Click the relevant agents name in the Phonebook and then click Chat.



Initiating a Chat with another Agent

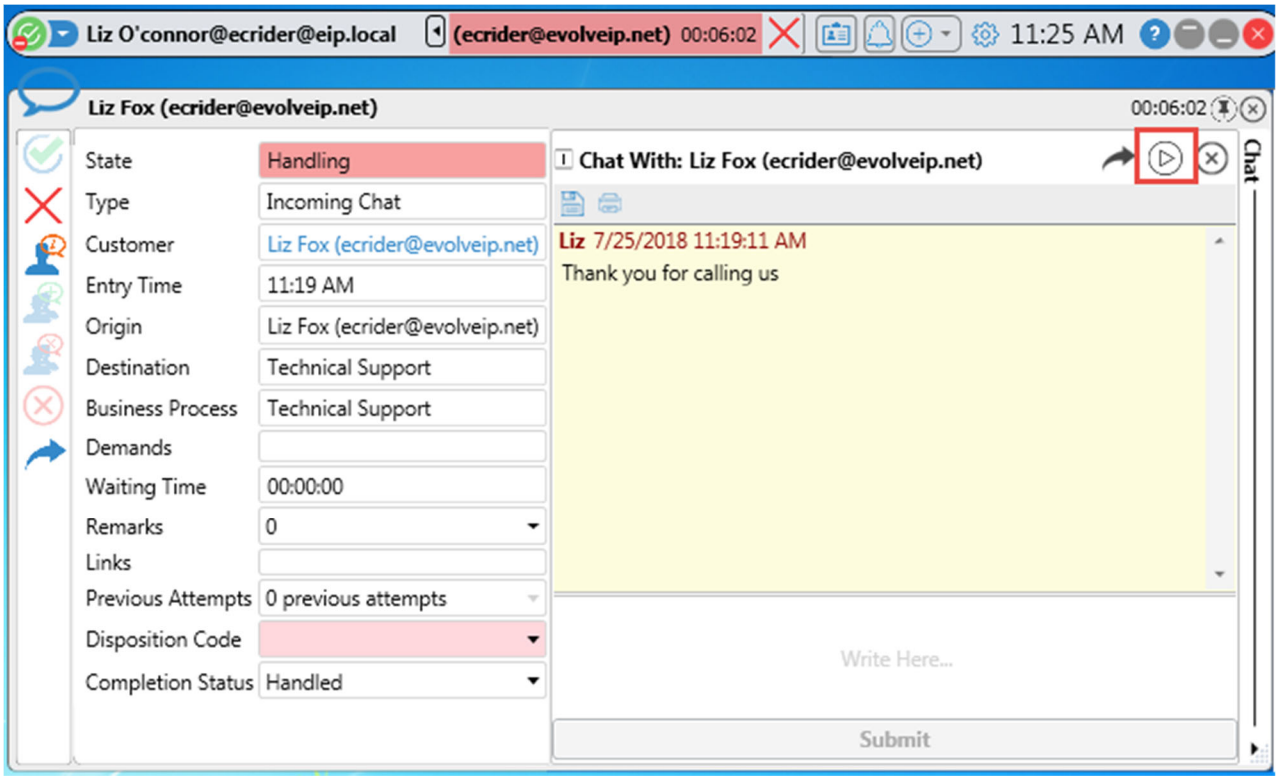
4.4 Place a Chat on Hold

4. Click ⏸ at the top of the chat session panel.



Chat Session - Hold Button

Click to retrieve the chat and proceed with the chat session.



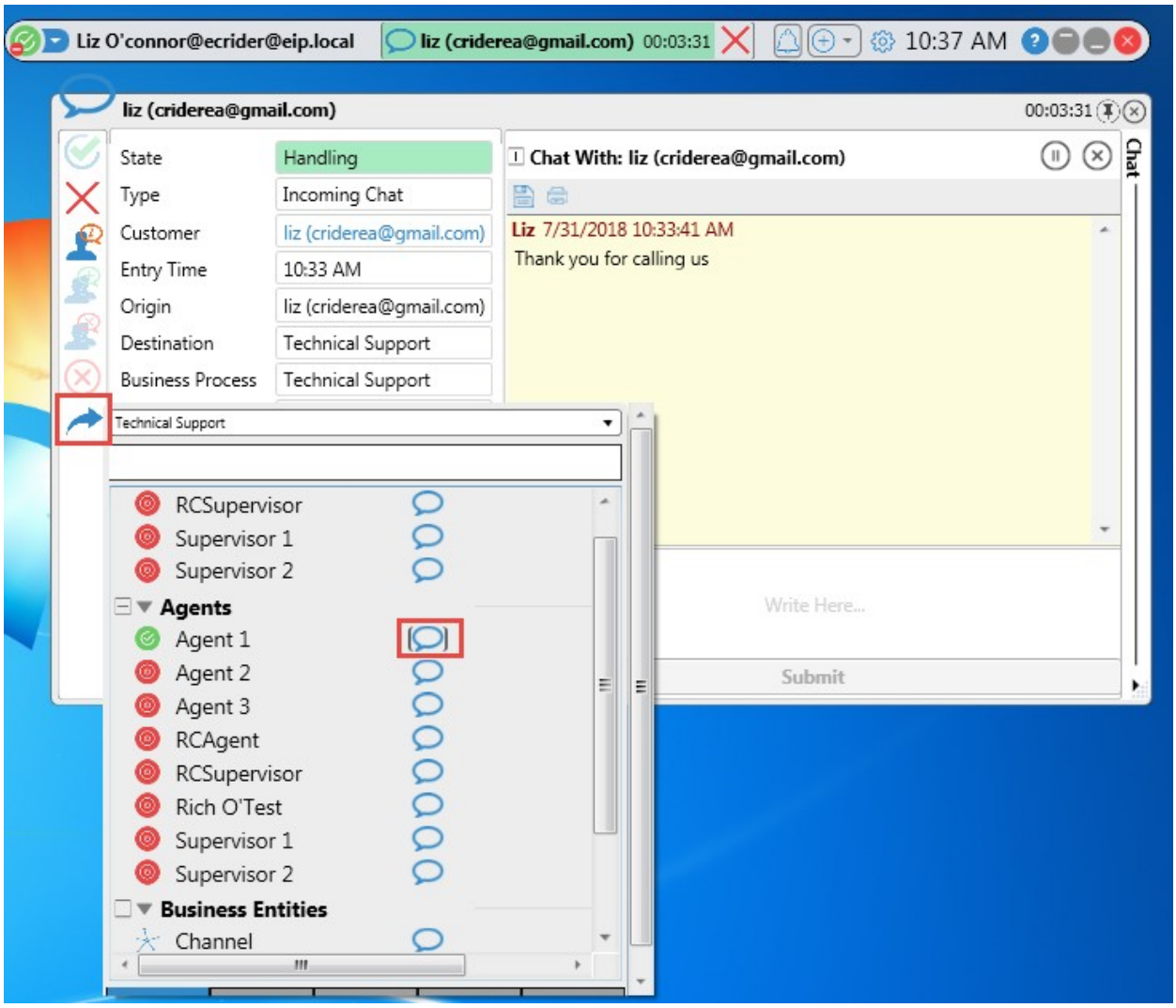
Chat Session - Retrieve Button

4.5 Transfer a Chat

You can transfer a chat to any available contact without consulting who you are transfering the chat to. The chat is transferred and you are disconnected immediately.

To transfer a chat:

1. Click . The Contact Panel is displayed allowing you to either select an agent from the list or search for an agent using the search box.



Transfering a Chat

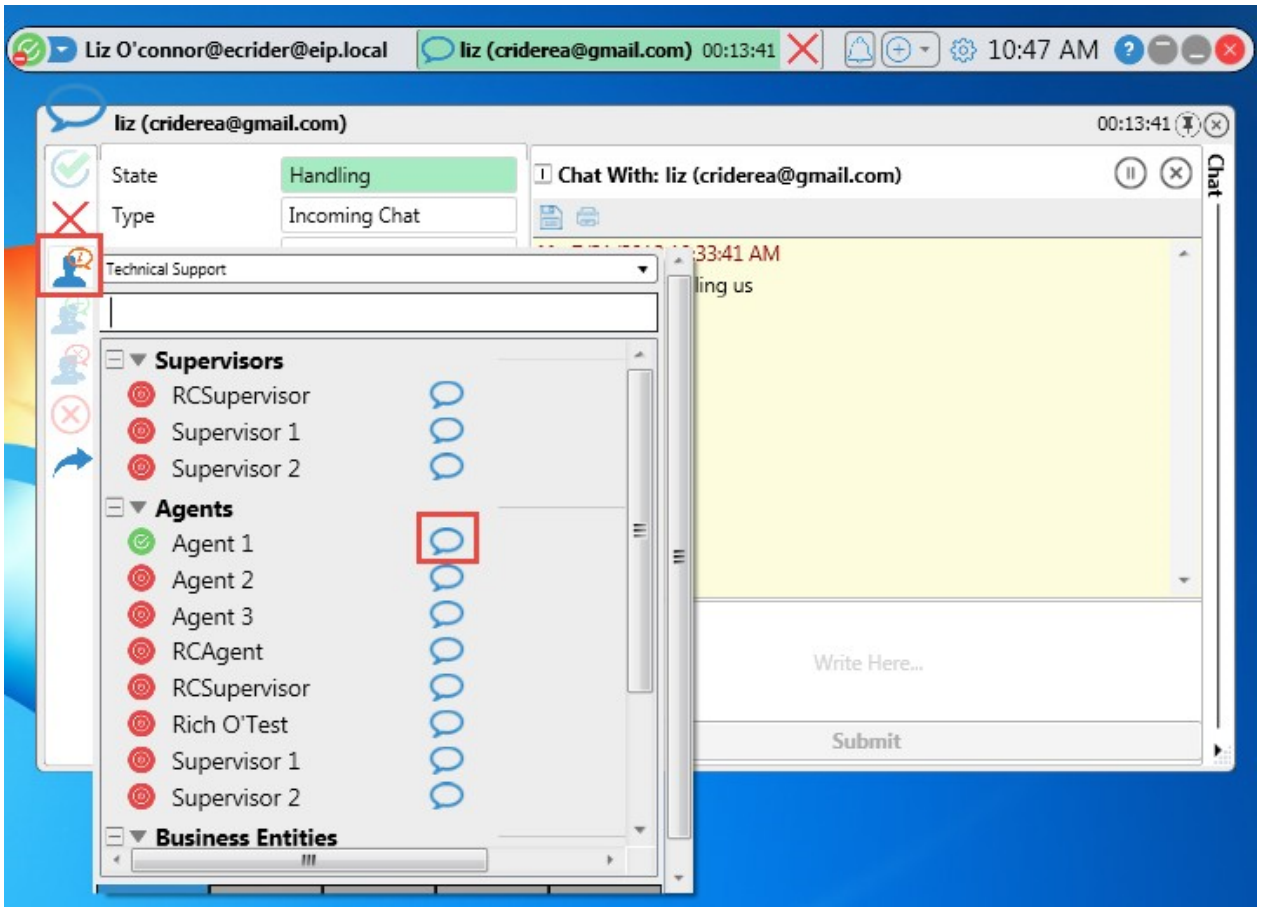
2. Select the Agent to transfer the chat to and then click the Chat button.

4.6 Consulted Chat with Agent or Supervisor

A Consulted Chat allows you to have a separate chat with another agent or supervisor during a chat session with a customer and typically used to get assistance.

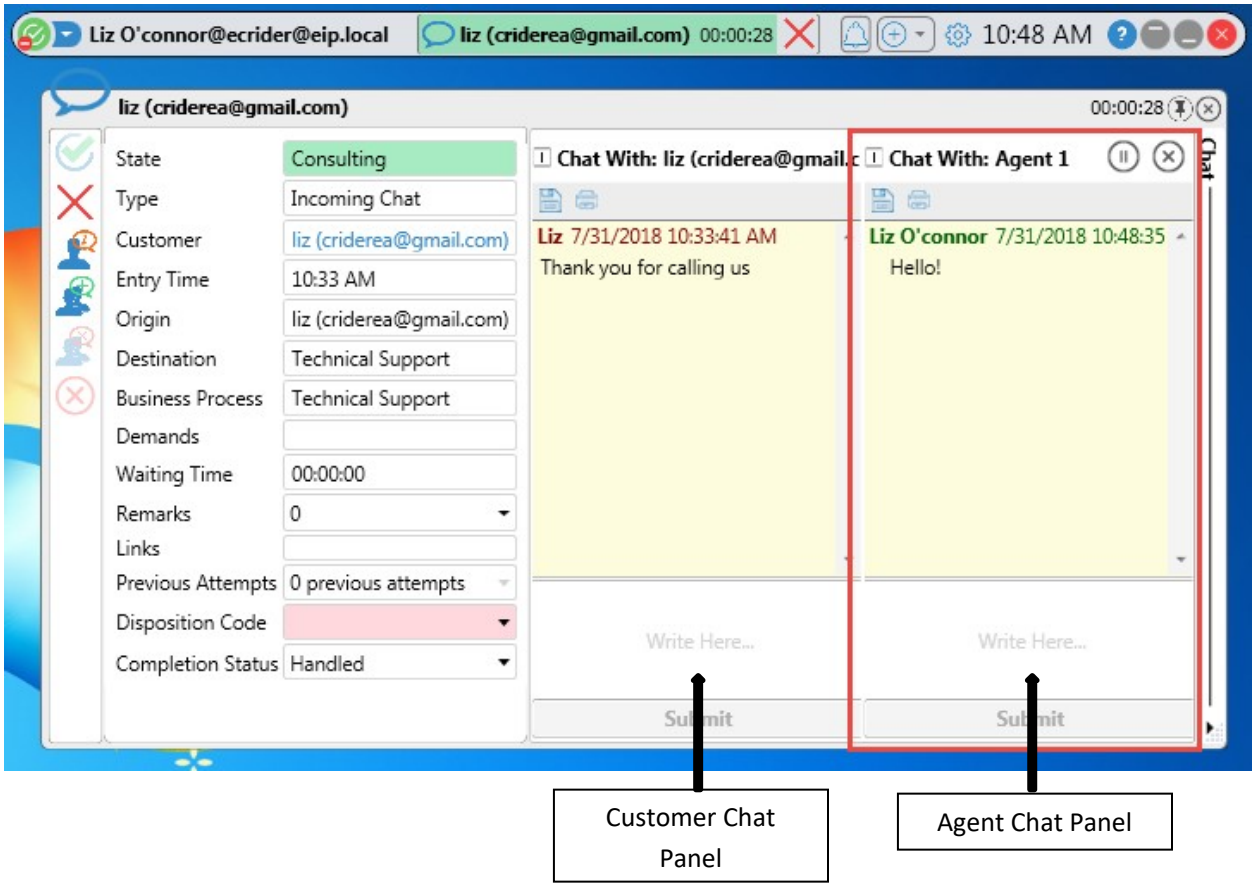
To start a Consult Chat:

1. Click . The Contacts panel is displayed allowing you to select an agent from the list or search for an agent.



Consulting with another Agent

2. Click the Chat button to send the consultation request.
3. Once your request is answered an additional panel is displayed below the main chat panel. This allow you to chat with the representative independent of the customer chat.



Consult Chat Panel

4. Click to transfer the chat to the agent, with whom you consulted with. Transferring the call can only be done when in consult mode.

	During a Consult Chat, the customer chat panel is put on hold. To resume the conversation with the customer and put the agent you are consulting with on hold, click on the retrieve button found in the customer chat panel.

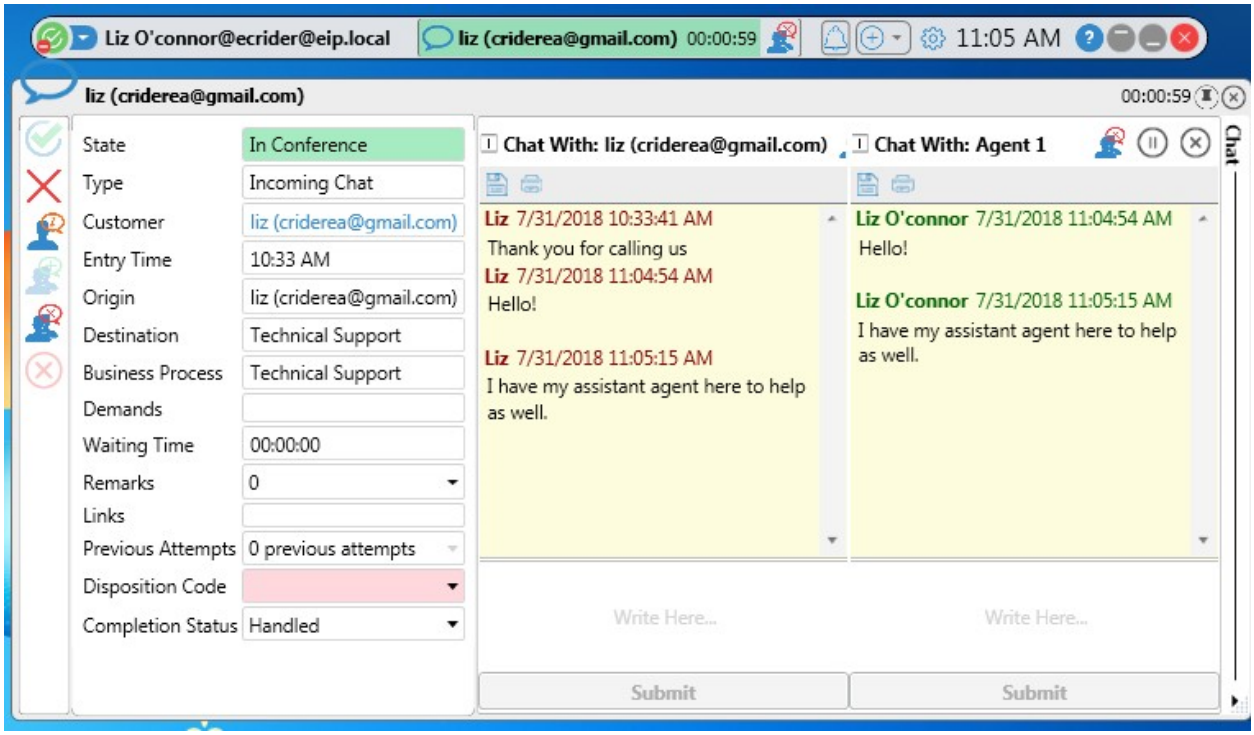
4.7 Conference Chat

A Conference Chat is available during a Consult Chat only.

To start a Conference Chat:

1. Follow the Consulted Transfer steps outlined above before performing the below steps to start a Conference Chat

2. Click to start a conference chat. Another chat session window opens alongside the one in progress.



Conference Chat in Progress

As the Conference Chat initiator you can:

- Remove any interaction attendee from the conference chat by clicking in the agent or customer chat panel.
- End the Conference Chat and resume customer interaction by clicking on the application panel.

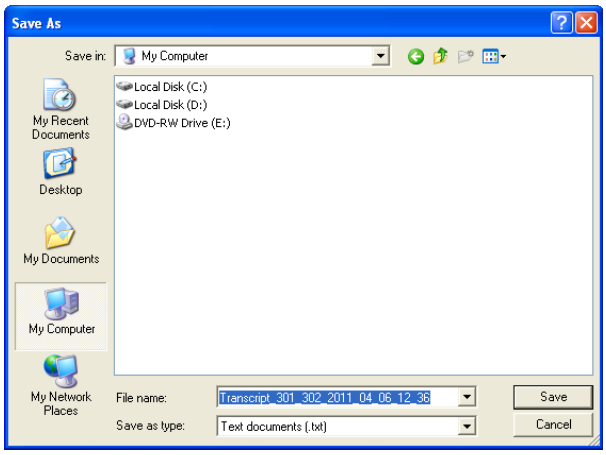
4.8 Save or Print Chat

You can save or print a chat transcript.

To save the chat transcript to a text file:

1. Click . The Windows Save As dialog is displayed.

The 'File name' field is entered automatically, showing some of the chat information e.g. the date and time of the chat.



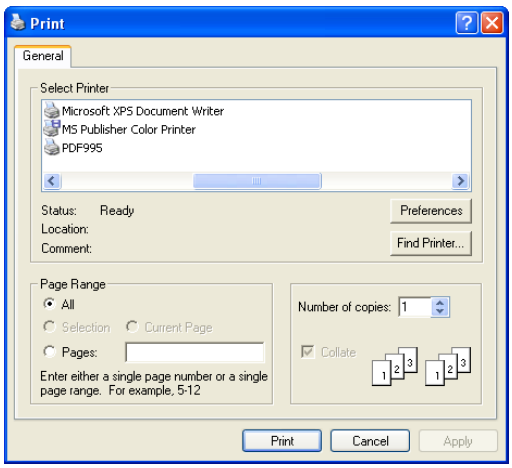
Chat Save as Dialog

2. Browse to the location where you want to save the file.

3. Click Save to save the file.

To print the chat transcript:

1. Click . The Windows Print dialog is displayed.



Chat Print Dialog

2. Select a printer from the printers list.

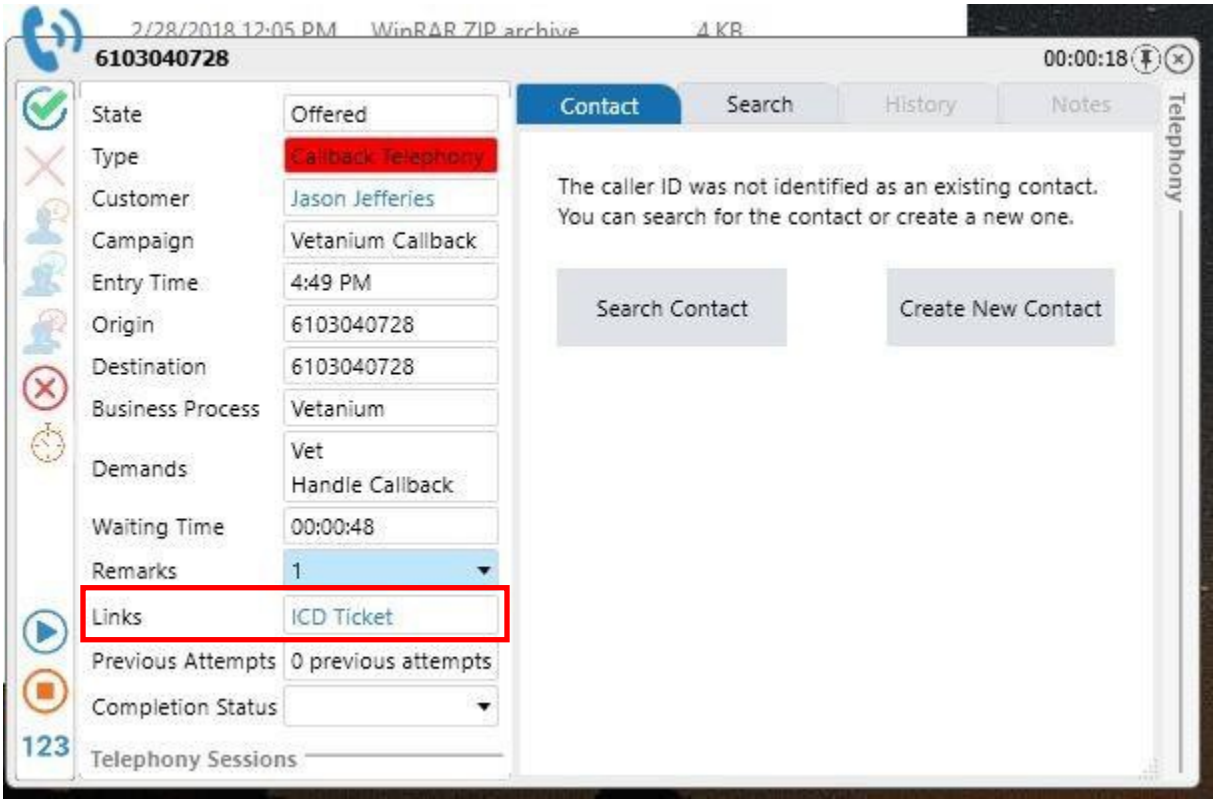
3. Click Print.

5. Additional Client Features

5.1 Links and Screen Pop

Clicking the active links (displayed in green underlined text) will open (or "pop") a web browser or file providing the agents with more information.

- **Customer Name Link** is configured in the Setup application and when set the Customer Name becomes a hyperlink to open the URL defined in the Setup (e.g. the customer's Facebook/LinkedIn account).
- **Customer Management Link** is configured in the Setup application and when set, the customer management becomes a hyperlink to open the URL defined in the Setup (e.g. a customer's account in a CRM application).
- **Location Link** is configured in the Setup application and when set, the location becomes a hyperlink to open the URL defined in the Setup (e.g. a customer's IP location on a map).
- **Product Link** is configured in the Setup application and when set, the product becomes a hyperlink to open the URL defined in the Setup (e.g. a preferred product selected by the customer during an IVR flow).



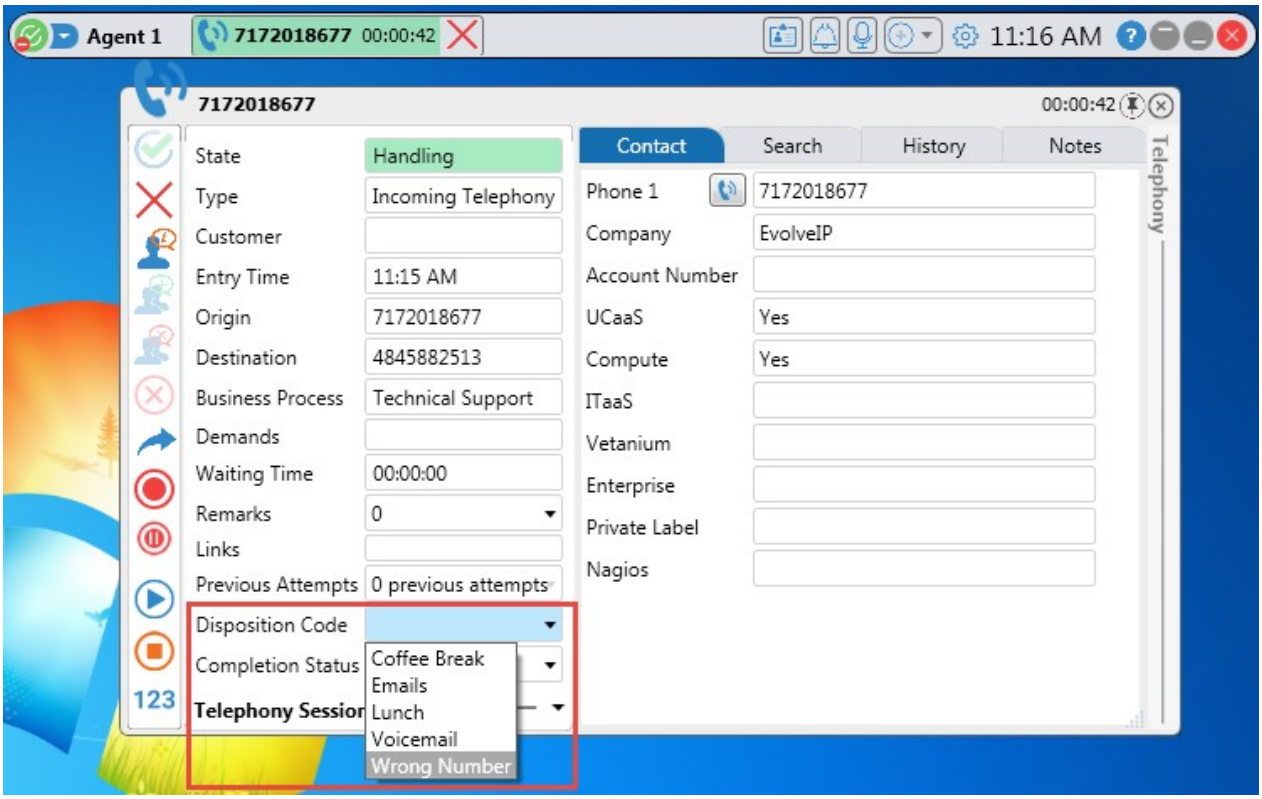
Interaction Information Panel - Customer Name Link

5.2 Disposition Codes

Disposition Codes allows agents to enter a 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. Example of disposition codes include Sale, Not Interested, Call Back, Do Not Call, etc.

To use Disposition Codes:

1. During an interaction click the Disposition Code drop-down. A list of pre-defined codes appears.

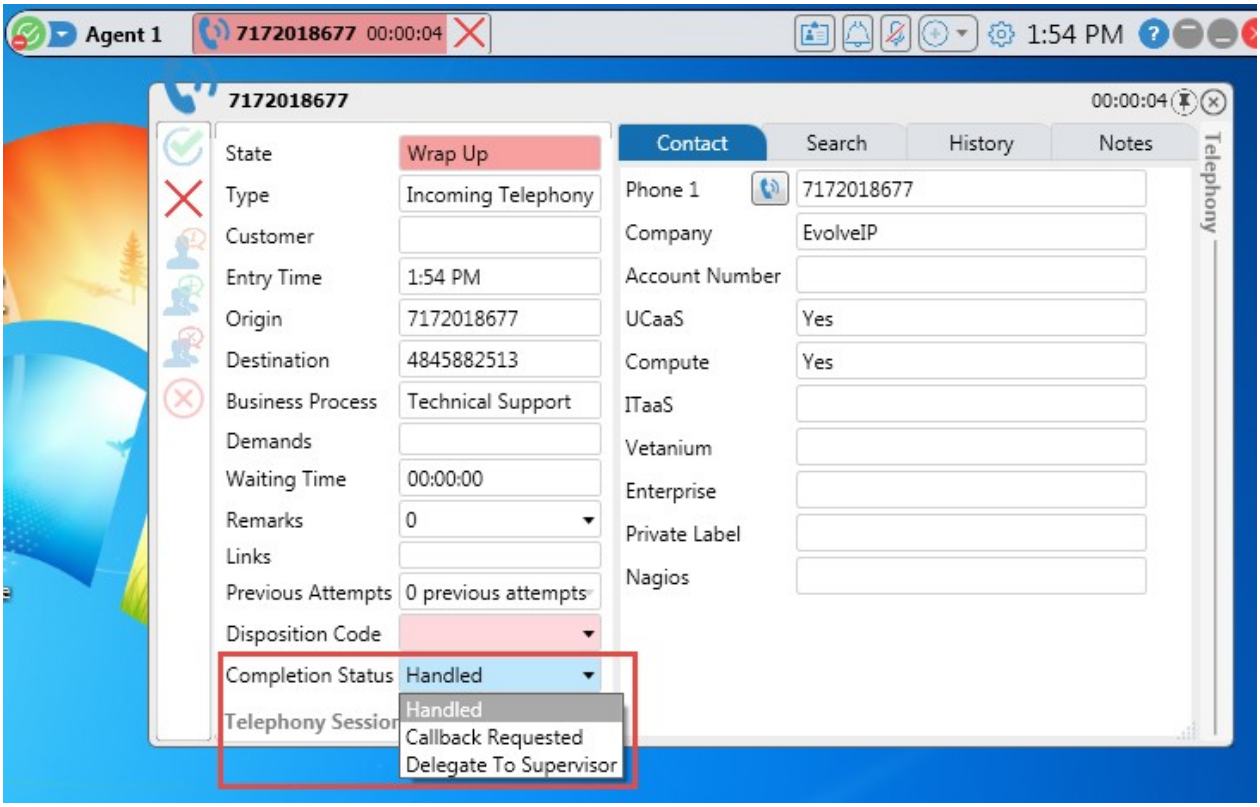


2. Select the code from the list.

5.3 Completion Status

Use the Completion Status panel to select a call status. This allows you to give a short explanation as to why the interaction ended. A status may be selected during or after an interaction.

Selecting 'Callback Requested' enables agents to postpone a call to a later time, for times when a customer cannot receive a call or wishes to postpone the call to another time. See Section 5.4 for more detail.



The table below lists the status options available in the Completion Status Panel:

Status Options in the Completion Status Panel

Status	Description
Handled	The call was answered and handled. This is the default value.
Callback Requested	The call was answered but the customer has

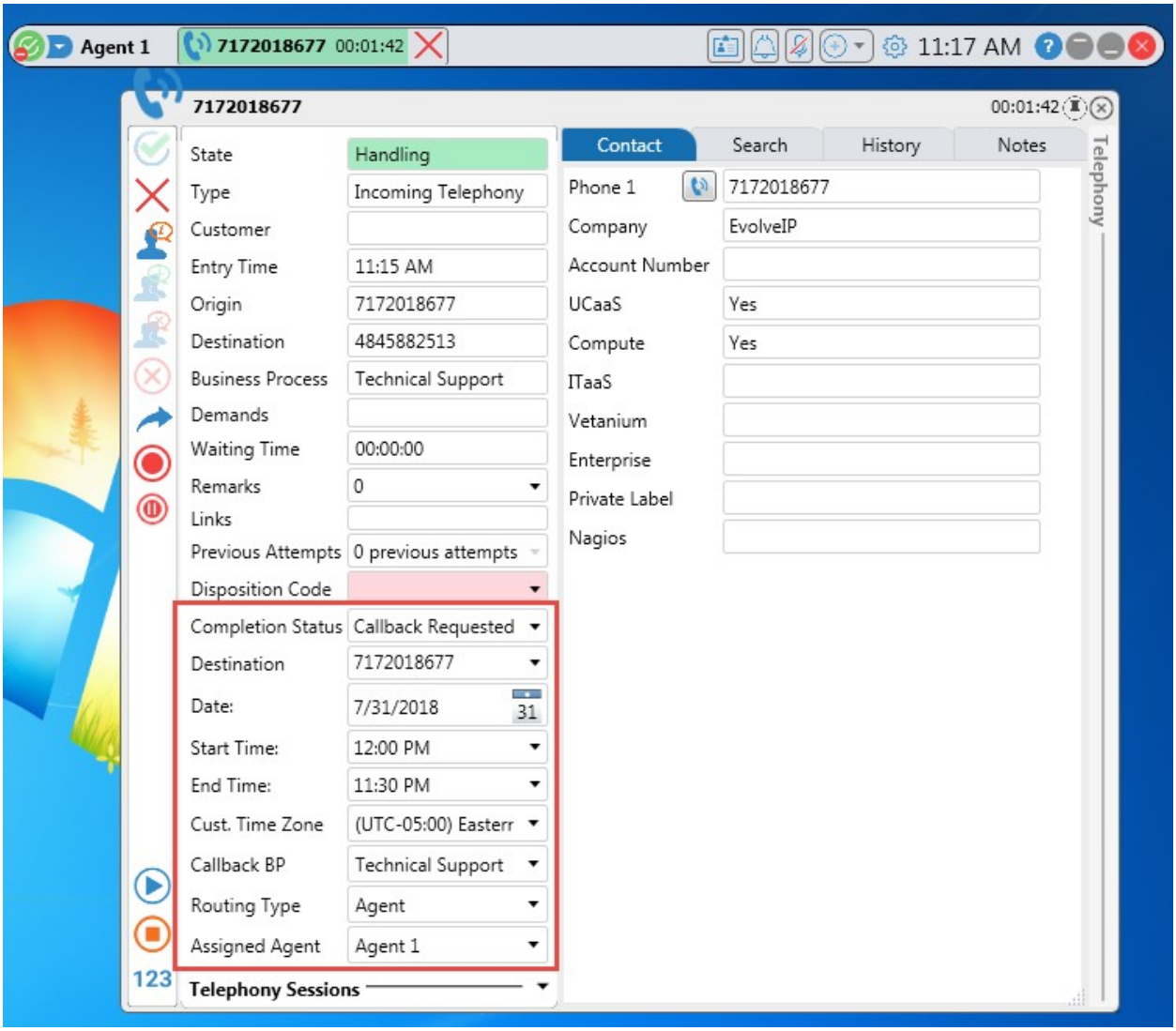
Status	Description
	requested to call back later.
Delegate to Supervisor	Option is only available if turned on in the Setup Client. Once a call has ended, agents can delegate a call to a Supervisor which remarks attached explaining why they call was delegated.

5.4 Callback Requested

The Callback feature enables agents to postpone a call to a later time, for times when a customer cannot receive a call or wishes to postpone the call to another time. This feature applies only to those Business Processes that allow callback options

To set a callback:

1. During a call session, click the Completion Status drop-down. A list of call statuses appear.



Selecting Callback Requested in the Completion Status Panel

2. Select Callback Requested. New 'callback' fields appear in the panel.

3. Open the Destinations drop-down and enter the new destination number, if any. This field is optional and allows you to add another callback destination number other than the origin number.

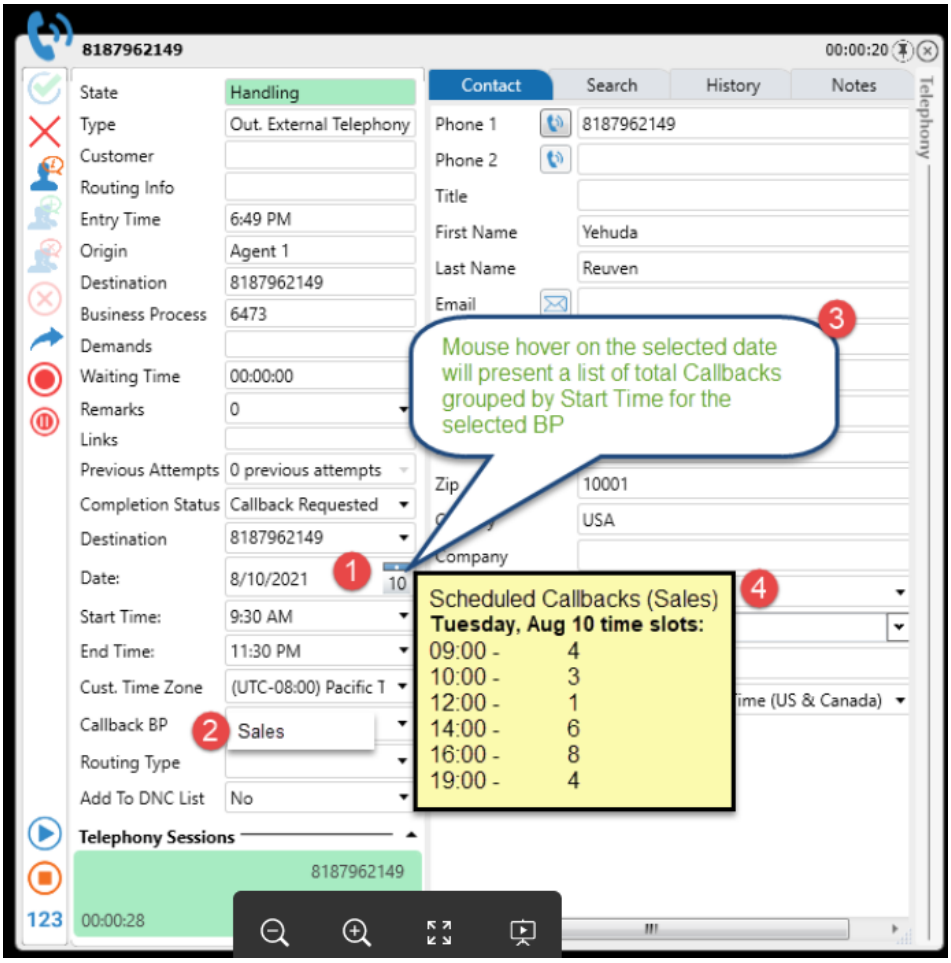
4. Set a 'From' date by clicking the drop-down. A calendar opens.

5. Set the time an agent is to make the call by clicking the 'Between' 'and' drop-downs.

6. Select the customer's Time Zone from the 'Cust. Time Zone' drop-down.

7. Click to complete the call.

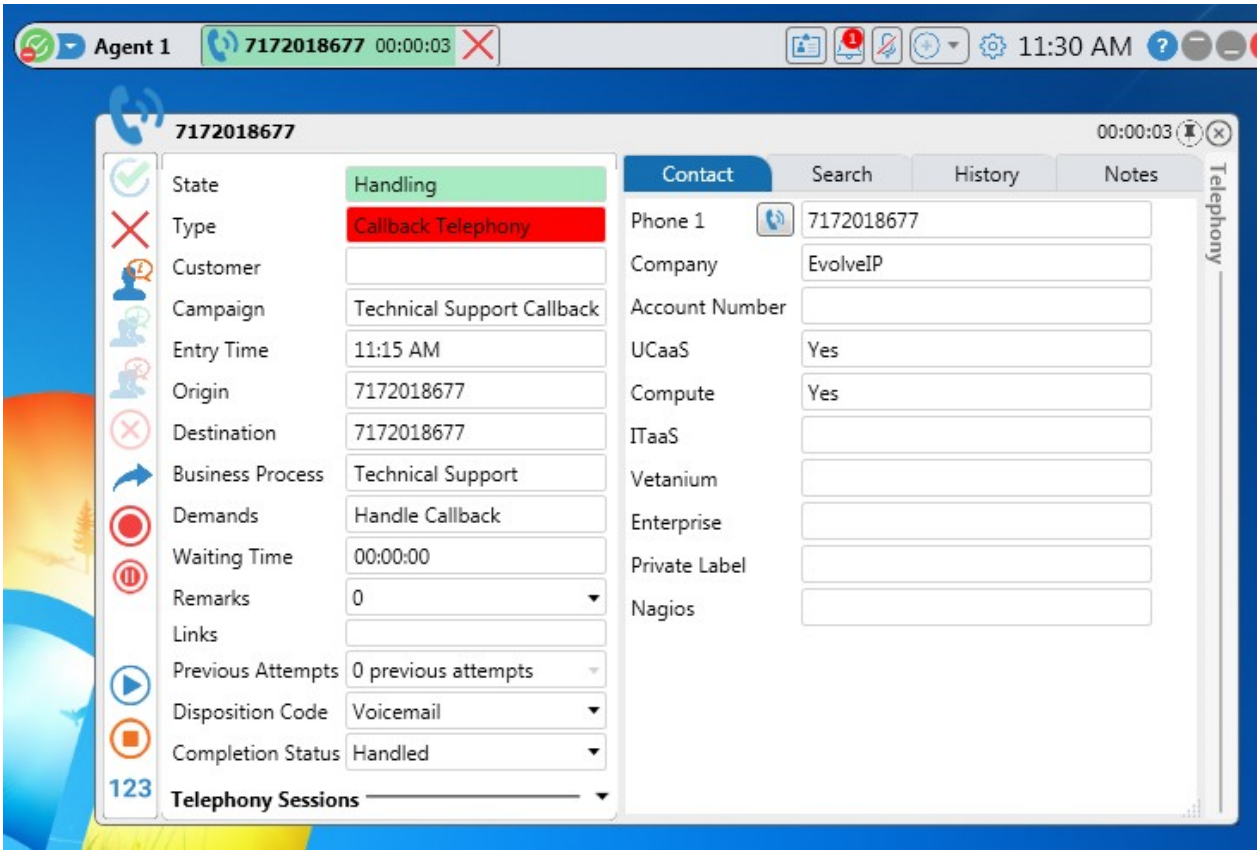
All callbacks for a specific business process are displayed when mousing over the date in the Interaction Panel.



5.5 Callbacks

Callback interactions are displayed with a red background in the Type field to differentiate between callback interaction and regular ones. Only once the agent accepts the interaction will the callback be performed.

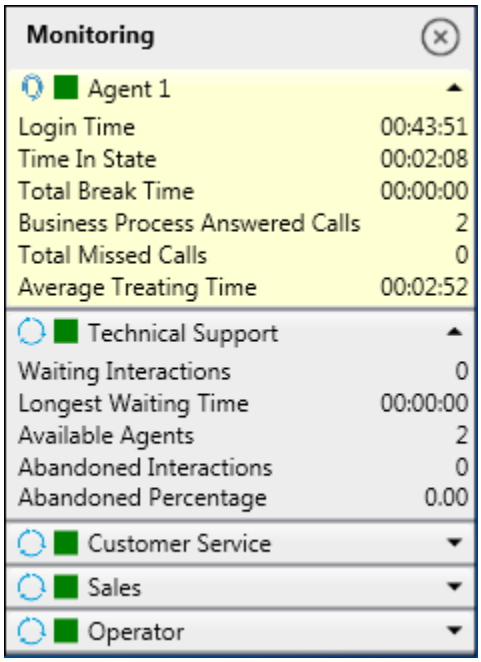
In outbound dialing, such as IVR and Predictive Campaigns, the system automatically detects busy tone, no answer time outs, fax tones, etc. As callback interactions are handled, it is important that agents enter a completion status or disposition code according to the result of the callback attempt.



Callback Interaction

5.6 Agent Monitor (real-time display)

The Agent Monitor displays improves the agent's awareness by displaying real-time information such as the number of waiting calls, the longest waiting time a call waited for an answer, answered calls and abandoned calls. The monitoring panel allows you to drill-down and get more specific details per agent and Business Process.

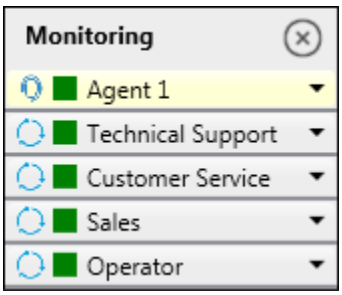


Agent Monitoring Drill-down

To open the Agent Monitor via the settings menu:

1. Click . The Setup drop-down menu opens.
2. Click

. The Agent Monitoring panel is displayed.
3. The Agent Monitoring panel is displayed.

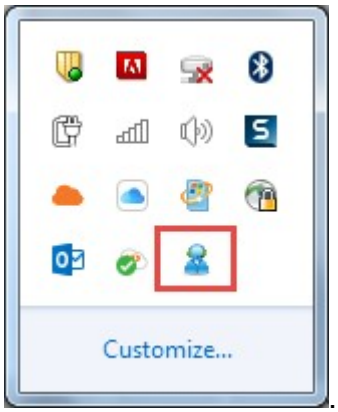


Agent Monitor Panel

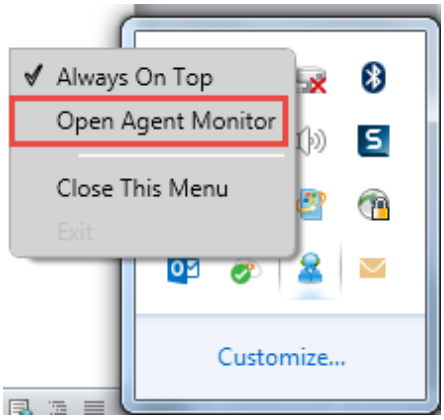
4. The monitor panel opens docked at the bottom right of the screen. Click and drag the panel to a different location on your screen if desired.

To open the Agent Monitor via the system tray:

1. Right-click the Evolve Contact Agent icon in the system tray.

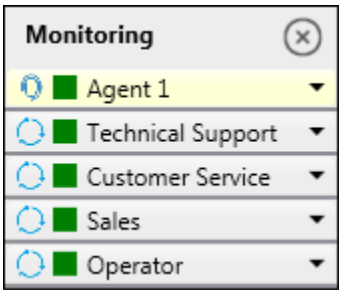


2. Select Show Monitor from the menu that opens.



Evolve Contact Agent Right-click Menu

3. The Agent Monitoring panel is displayed.



Agent Monitor Panel

4. The monitor panel opens docked at the bottom right of the screen. Click and drag the panel to a different location on your screen if desired.

5. Click to close the panel.

6. Click alongside the agent or BP name to expand the agent monitoring panel, allowing you to view monitoring details.

7. To contract the panel, click .

Agent Monitoring items

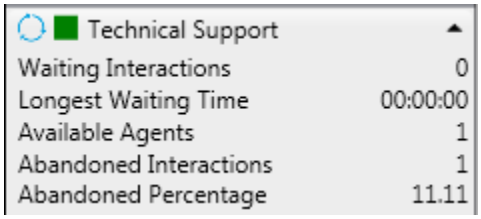
The table below shows some of the the fields that can be included in the agent and Business Process monitor section. The Statistics shown can be customized to the skilling profile assigned to the agent and determined by the Supervisor or Administrator.

Field	Description
Agent Statistics	
Login Time	The elapsed time an agent was logged in i.e. from the time an agent logged in (shift started) to the time the agent logged off (shift ended). The counter is reset when an agent logs out.
Time In State	The time elapsed since agent's mode started. (or

Field	Description
	last change)
Total Break Time	The accumulated time the agent spent in 'Break' mode since the agent's shift started.
Business Process Answered Calls	Total number of interactions the agent answered/accepted since the agent's shift began.
Total Missed Calls	Total number of interactions the agent failed to answer on-time (didn't answer or reject) since the agent's shift started.
Average Treating Time	The average handling time for BP originated interactions handled by the agent. Interactions' duration calculated from agent's answering time until it was disconnected. This field Includes outgoing and incoming interactions (both internal and external), while private, consult, and conference interactions are excluded.
Business Process Statistics	
Waiting Interactions	Total number of interactions currently waiting in the Business Process
Longest Waiting Time	The longest waiting time for interactions currently in the Business Process
Available Agents	The number of agents that are currently available. This includes: Agents that are in ready mode, not busy or private in.
Abandoned Interactions	Total number of interactions disconnected (abandoned) by customers while in the queue, since

Field	Description
	the shift started.
Abandoned Percentage	The total percentage of abandoned interactions out of the total number of interactions in the current shift.

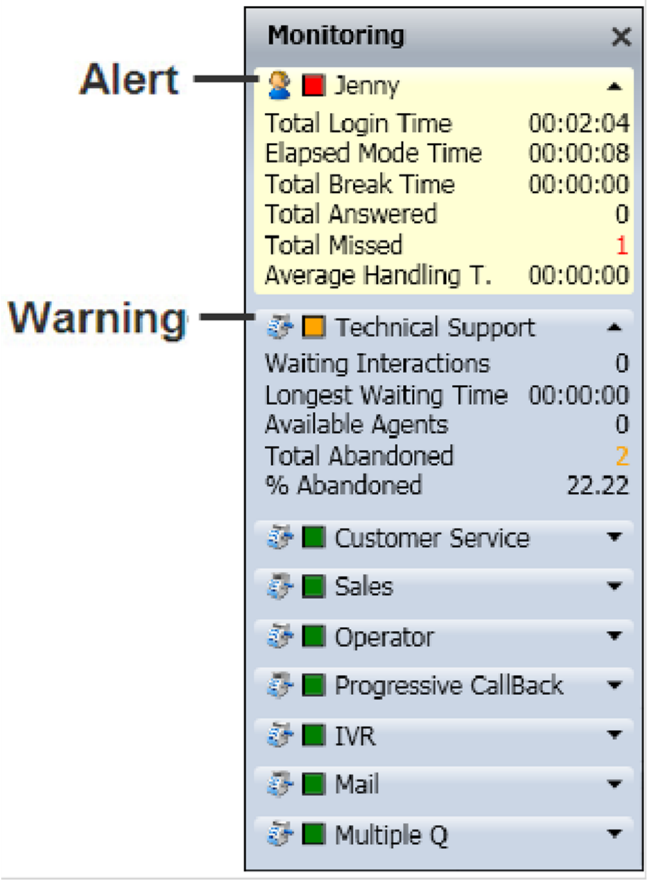
You can drill-down on the relevant Business Process by clicking the drop-down alongside the relevant Business Process name. The following is displayed:



5.6.1 Agent Monitor Alerts and Warnings

Alerts and Warnings (when implemented in the Setup Client) are shown on the Agent Monitoring in different colors. Alerts appear in red and Warnings in orange. Agent or BP threshold limits are set using the Setup application.

Only if the threshold limit is exceeded will the relevant color be displayed.

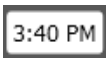


5.7 Time Zones

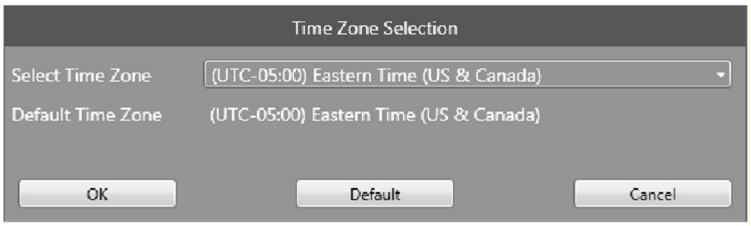
ECS and the Agent Client supports multiple time zones to handle interactions that arrive from customers who are in different time zones than the Contact Center (e.g. the Contact Center is in New York and the customer is in California). This is applicable when an organization has Contact Centers or customers in different time zones.

The Evolve Contact Agent's default Time Zone is taken from the agent's local computer settings. The Time Zone is displayed as a tooltip on the Evolve Contact Agent. Mouse-over the time indicator to see the tooltip.

To change your Time Zone:

1. Click the area on the Evolve Contact Agent that displays the time 

. The Time Zone Selection window opens.



Time Zone Selection Window

2. Click the 'Select Time Zone' drop-down and select the appropriate time zone from the list of available time zones. The list of time zones that appear here are defined using the Setup application.

3. Click OK to accept the changes.

4. Click Cancel to ignore the changes.

5. Click Default to apply the default settings (i.e. the time zone displayed will be taken from your local computer settings).

	Note: Incoming interactions will display the agent's time zone. Callback Interactions: If the customer's time zone is known, agents will see the customer's time zone. The callback is scheduled using the customer's time. Changing the default Time Zone, to a different time zone, displays the time in a different color (e.g. 10:56 AM)