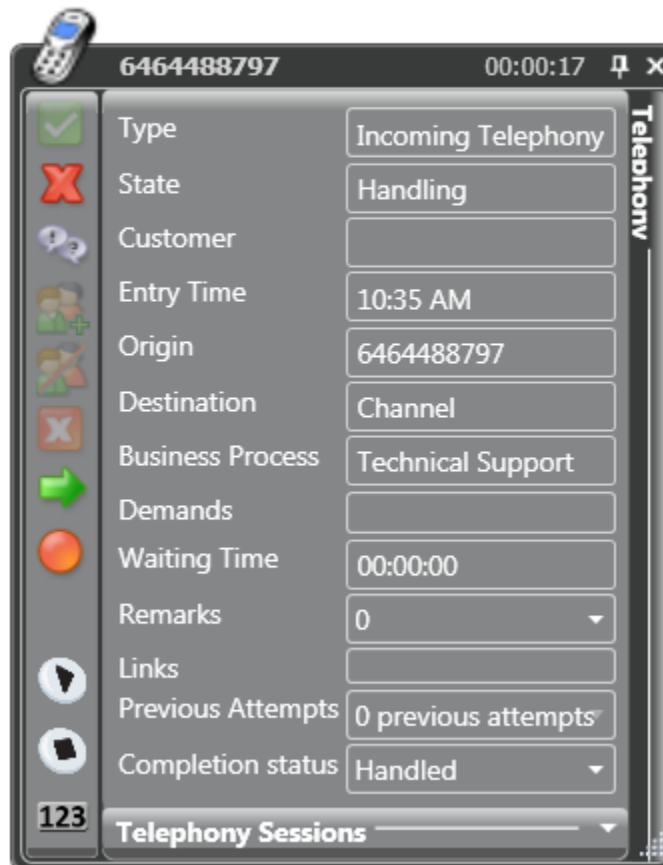



# EVOLVE CONTACT

## How to use Advanced Agent Commands

There are several advanced commands, an agent can use when interacting with a customer; Consult, Conference, Blind/attended transfer and Call recording. These commands are available for any kind of interaction (voice, chat, email) .



## Consult:

To consult with a 3<sup>rd</sup> party, click on the consult icon  and then select the consulting destination by one of the following options: Dial Pad, Address Book or Recent tab:



While connected with a consulting 3<sup>rd</sup> party, the initial interaction with the customer is put on hold. During the consultation period you have the following options:




- Return to the interaction with the customer after a brief with a 3rd party consultant
- Transfer the customer to the 3rd party consultant
- Toggle the interaction between the parties
- Create a conference


Field	Value
Type	Incoming Telephony
State	Consulting
Customer	
Entry Time	11:15 AM
Origin	6464488797
Destination	Channel
Business Process	Technical Support
Demands	
Waiting Time	00:00:04
Remarks	0
Links	
Previous Attempts	0 previous attempts
Completion status	Handled

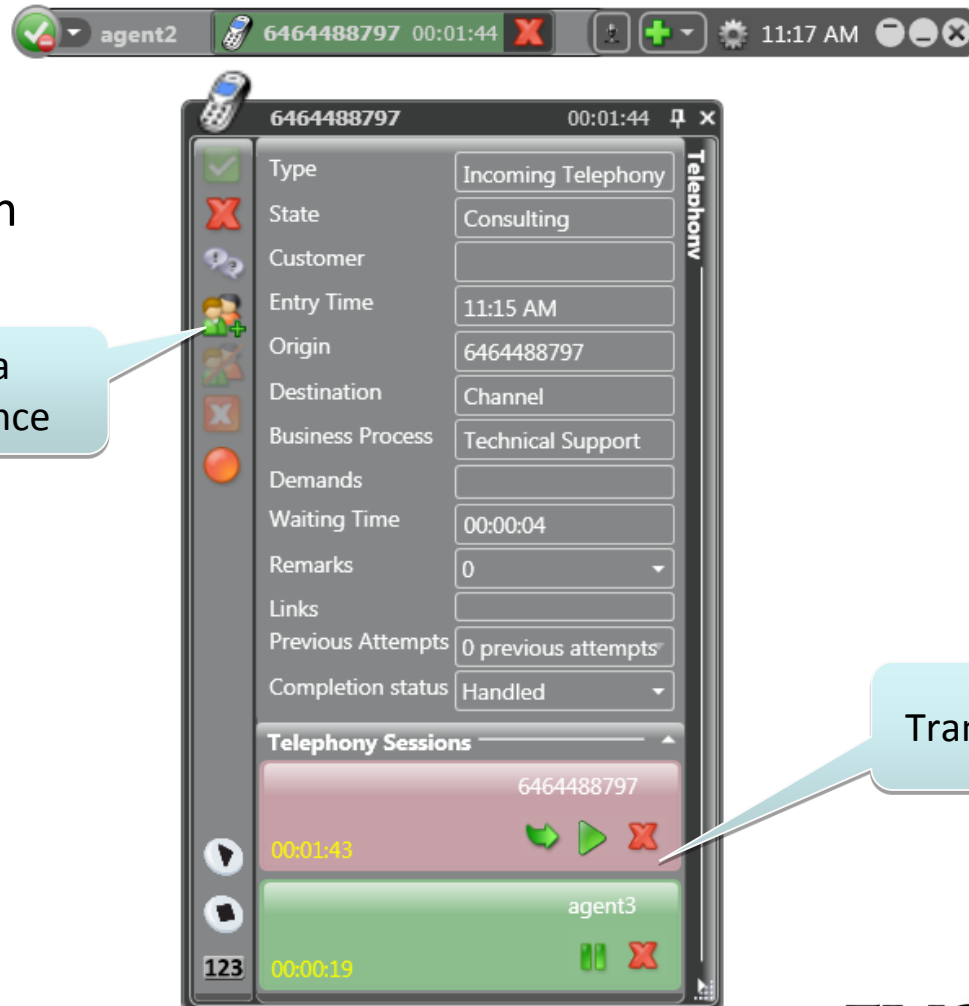
Session	Background	Timer	Controls
6464488797	Red	00:01:43	Play, Stop, X
agent3	Green	00:00:19	Play, Stop, X

The red background indicates the leg on hold  
The green background indicates the active leg

To transfer the customer to the 3rd party consultant (attended transfer), click on the green arrow  within the customer interaction area and the call will be transferred to the 3rd party .

To start a 3-way conference call click on the start conference icon 

Start a conference





The screenshot shows a call center interface. At the top, a status bar displays 'agent2', the phone number '6464488797', and a duration of '00:01:44'. Below this is a call log with two entries: a red entry for '6464488797' with a duration of '00:01:43' and a green entry for 'agent3' with a duration of '00:00:19'. A call details panel for the red entry is open, showing fields for Type (Incoming Telephony), State (Consulting), Customer, Entry Time (11:15 AM), Origin (6464488797), Destination (Channel), Business Process (Technical Support), Demands, Waiting Time (00:00:04), Remarks (0), Links, Previous Attempts (0 previous attempts), and Completion status (Handled). The panel also features a 'Telephony Sessions' section with a green arrow icon for transfer and a red 'X' icon for end call. A call icon is visible in the top left corner of the panel.

Transfer a call

Both the interaction are now connected into the 3-way conference:

The screenshot shows a CRM interface with a call log. At the top, a status bar displays 'agent2', the phone number '6464488797', a duration of '00:00:36', and a 'Stop' button (red 'X'). Below this, a detailed call record for '6464488797' is shown, with a duration of '00:00:36'. The record includes fields for Type (Incoming Telephony), State (In Conference), Customer, Entry Time (11:46 AM), Origin (6464488797), Destination (Channel), Business Process (Technical Support), Demands, Waiting Time (00:00:09), Remarks (0), Links, Previous Attempts (0 previous attempts), and Completion status (Handled). Below the call record, a 'Telephony Sessions' section lists two sessions: one for '6464488797' (00:00:36) and one for 'agent3' (00:00:20). Both sessions have a 'Stop' button (red 'X') next to them. A callout box with the text 'Stop a conference' points to the 'Stop' button for the '6464488797' session.

Additional parties can be added to the conference:

Use the consult icon  to initiate the new call and click on the plus icon  to connect the party to the conference.



The screenshot shows a telephony interface with a top status bar and a main details panel. The status bar includes a checkmark, 'agent2', a phone icon, '6464488797 00:00:36', a red 'X' icon, a microphone icon, a green plus icon, a gear icon, and '11:47 AM'. The main panel has a title bar with a phone icon, '6464488797', and '00:00:36'. The details panel lists various call attributes with icons on the left and values on the right. Two call sessions are listed at the bottom.

Icon	Field	Value
✓	Type	Incoming Telephony
✗	State	In Conference
📞	Customer	
🕒	Entry Time	11:46 AM
👤	Origin	6464488797
📞	Destination	Channel
✗	Business Process	Technical Support
🔴	Demands	
	Waiting Time	00:00:09
	Remarks	0
	Links	
	Previous Attempts	0 previous attempts
	Completion status	Handled


  

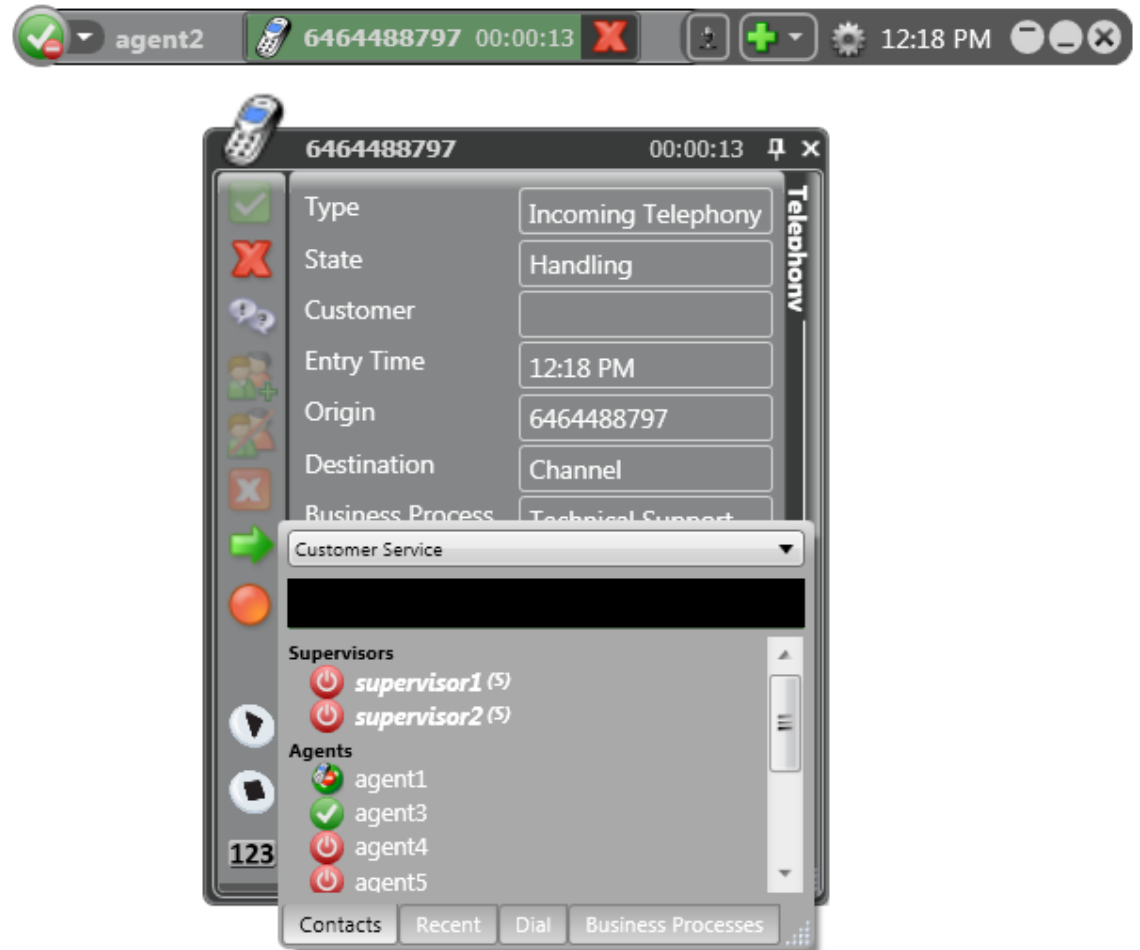
Telephony Sessions		
00:00:36	6464488797	👤 📞 ✗
00:00:20	agent3	👤 📞 ✗

Initiate the new call

Connect the new party to the conference

## Blind transfer:

The blind transfer option is used to transfer an interaction immediately, without consulting first. Click on the green arrow  and then select the transferring destination using one of the following options: Dial Pad, Address Book or Recent tab to transfer the interaction:



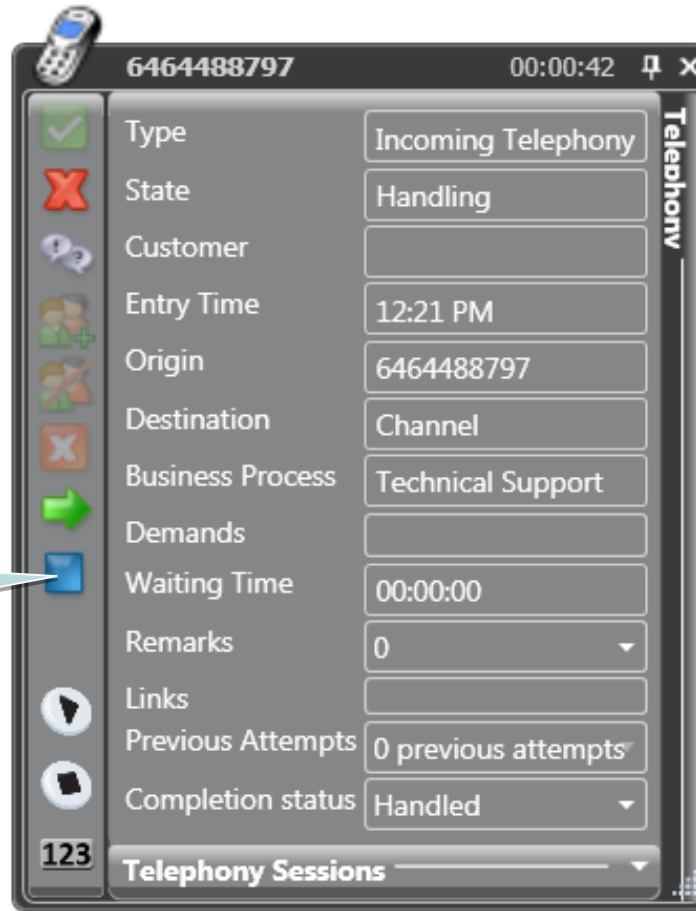


## Record a call:

A call details window titled '6464488797' with a timer '00:00:09'. The window contains a list of call attributes, each with an icon on the left and a text field on the right. A red circular button with a white recording symbol is positioned to the left of the 'Waiting Time' field. A light blue callout bubble with the text 'Start recording' points to this button.

Icon	Field Name	Value
Green checkmark	Type	Incoming Telephony
Red X	State	Handling
Speech bubbles	Customer	
Person icon	Entry Time	12:21 PM
Person icon with plus	Origin	6464488797
Person icon with minus	Destination	Channel
Red X	Business Process	Technical Support
Green arrow	Demands	
Red circle with recording symbol	Waiting Time	00:00:00
	Remarks	0
Location pin	Links	
	Previous Attempts	0 previous attempts
Document icon	Completion status	Handled

To stop recording click the blue icon.



Stop recording

The recorded conversation will be stored for future reference and can be retrieved only by the supervisor

Thank you!

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