

EVOLVE

THE CLOUD STRATEGY COMPANY™

Evolve IP – User manual OCC7 Agent & Supervisor

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Inhalt

1.	Introduction	3
2.	Before you start	3
3.	Logging in	3
3.1.	Connecting headset/IP phone	3
3.2.	Logging in	3
4.	Webagent settings (preferences)	4
5.	Agent interface	4
5.1.	Gadgetory	5
5.2.	Calls menu.....	5
6.	Agent user screen	6
6.1.	Gadget and buttons	7
7.	Incoming e-mail, callback or chat conversation.....	9
7.1.	Setting up a call	15
7.2.	On hold, forwarding, conference	16
7.3.	Recording	17
7.4.	Terminating a call and wrap-up	17
7.5.	Planning a callback.....	18
7.6.	Using Canned Phrases.....	18
7.7.	Messageview agent.....	19
8.	Supervisor interface.....	20
9.	Supervisor features	21
9.1.	Monitoring agents	21
9.2.	Accepting an assistance request.....	22
9.3.	Initiating an assistance request	23
9.4.	Sending a Broadcast Message.....	23
9.5.	Remotely logging out an agent.....	24
9.6.	Messageview Supervisor.....	25

1. Introduction

This manual describes the different functionalities of an Online Contact Center agent and supervisor.

This manual serves as a concise reference document for the use of the agent and supervisor interface. If extensive training is required, please contact Evolve IP Europe via 088-4283111.

2. Before you start

Before you can use Online Contact Center you first need to add the URL you will be using to start the application to your trusted websites. To do this, follow these steps:

1. In your Internet browser, go to the **options menu** and select **Internet options**;
2. Select the **Security** tab;
3. Choose **Trusted websites**;
4. Click **Websites**. A list will be shown with previously added websites;
5. Under **Add this website to the zone**: enter the **AIS Domain name** (occ7.mtel.eu);
6. Then click **Add**;
7. Ensure the checkbox with **Server verification (https:) required for all websites in this zone** is off;
8. Click **Close**;
9. Click **OK**;
10. Restart OCC.

3. Logging in

3.1. Connecting headset/IP phone

Before the user logs in, it is important that the headset/IP phone is connected and the associated software is installed.

3.2. Logging in

Open your Internet Browser and go to the link you have received from Mtel:
e.g. <http://web.occ7.mtel.eu/touchpoint>

Enter your **Username** in the login screen that appears. The Username of the agent is listed in the completion letter. The format is as follows: username@tenantname.occ7.mtel.eu

Then, enter the **Password** specified in the completion letter associated with your **Username**.

If desired, you can choose to **select a different language** from the available list and add the **URL to your favorites**. Then, click **Login**.

If you are prompted to change the password, you must enter a password which meets the following criteria:

- At least 8 characters
- Must contain at least 3 of the following 4 characters: uppercase, lowercase, numbers, and punctuation marks.
- The last 3 previously used passwords cannot be used.
- The username cannot be used as a password.
- A password is valid for no longer than 90 days.
- A password can't be changed twice within 30 days.




4. Webagent settings (preferences)

When you start the application for the first time, you must check the settings of the application to receive and set up calls. To check your settings, click **Settings** and go to **Preferences**.

1. Enter **Country Code 31**;
2. Enter **Area Code 010**;
3. Under **Communication type**, indicate whether you want to call using an **SIP** (headset) or a **Voice Device** (external phone or mobile phone number). If you choose Voice Device, you need to enter the phone number via which you are available.
4. Under Answer Options, you can specify the following:
 - a. **Bring to front** – whether the application should be brought to the front when a call comes in.
 - b. **Auto available** – whether you must be immediately available upon logging in.
 - c. **Answer calls automatically** – if you want incoming calls to be automatically answered.
5. **External E-mail Address** and Mailbox Pin can be skipped.
6. You can set an automatic greeting for when you receive a chat message. Check **Use greeting** and enter your personal greeting.
7. Save your setting by clicking Save.

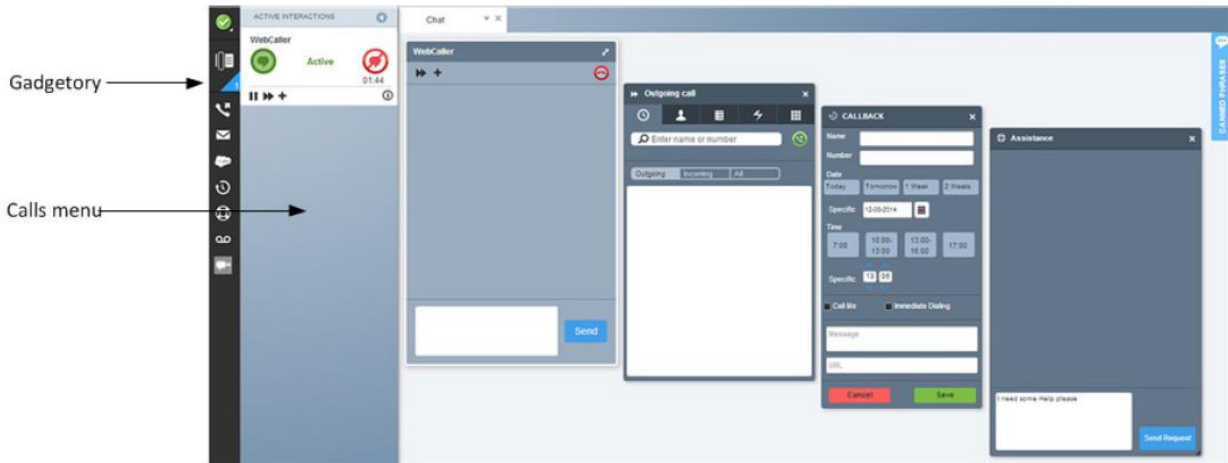
5. Agent interface

Via the OCC interface, you can access all the functionalities of Online Contact Center. The interface is roughly divided into two parts.

1. The **Gadgetory**: In the OCC interface, the toolbar is called Gadgetory. Notifications are displayed in each individual icon. For example, when you have a personal voicemail message, the notification will look like this .

The Calls menu: The Calls menu opens when you click it or if you have activated Answer Calls Automatically in your Settings. The calls menu contains the following call types:

- Voice
- Chat
- E-mail
- Callback



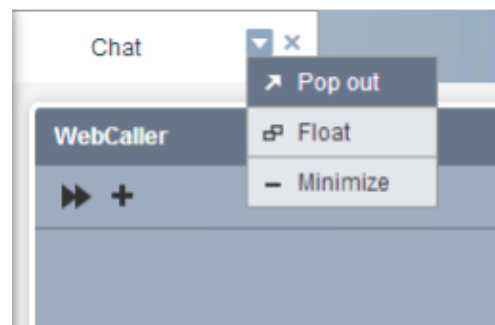
5.1. Gadgetory

You can change the way the application is displayed:
Tab – use this option when you need maximum screen space.

Floating window – use this option if you want to run applications side by side.


Pop-out – use this option if another screen is your main screen.

Minimize – minimize the entire application



To change the display mode of the application, click the downward arrow and select the desired option.

5.2. Calls menu

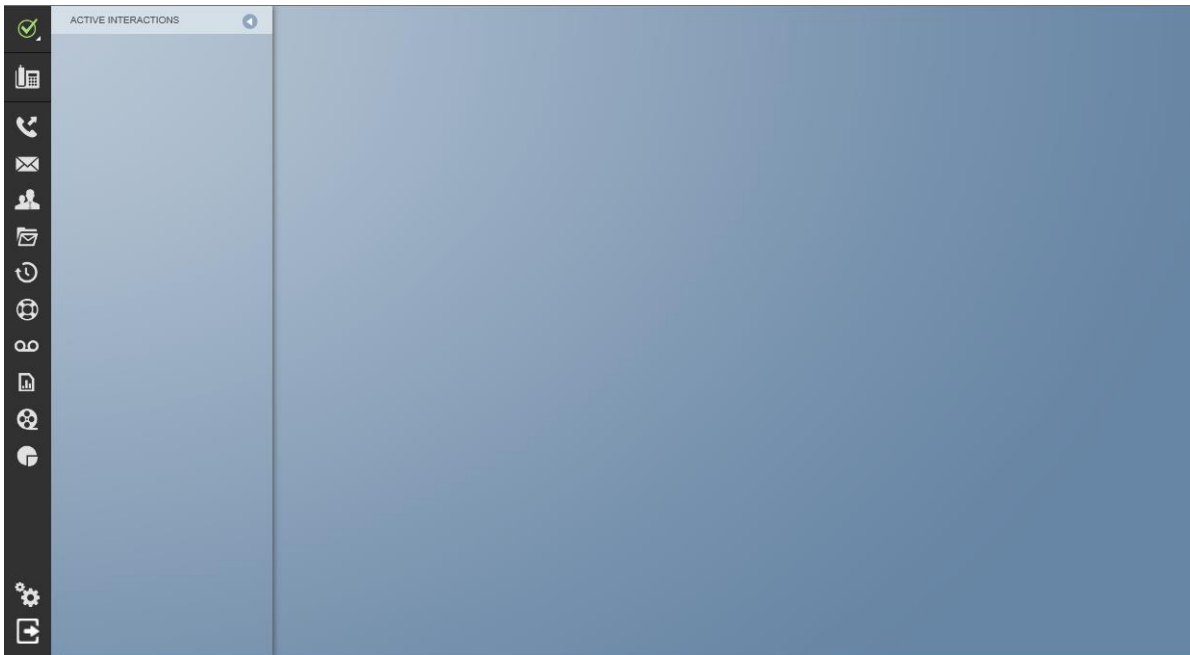
The calls menu opens when you click  or if you have activated Answer Calls Automatically in your Settings. The calls menu contains the following call types:

- Voice
- Chat
- E-mail
- Callback

To **close** the calls menu, you must click the left arrow at the top of the menu.

6. Agent user screen

The agent interface can be displayed in different ways: in the form of a toolbar, in full screen mode, and in Active Interactions mode.







Desired action	Click
To expand your toolbar to Active Interactions mode	
To reduce your application to the Toolbar mode	or the left arrow next to Active Interactions
To end Full Screen mode	Move your mouse over the blue button on the right side of the screen and click on the arrow pointing left.















Press the **availability** button to become available and able to answer calls, the button will turn green. When you are not available to take calls, click **availability** again. You will now see a screen in which you must specify the reason for no longer being available. The button turns red. As long as you are not available, calls will not be offered.


When you are available to take calls, in addition to the green button, there is another indication which shows you whether you are available.


















In the bottom right of the system tray, there is a headset icon which turns green to indicate availability.

-  Agent is logged in and available for calls.
-  Agent is not available (Released).
-  Agent is busy.
-  Agent is not connected.

6.1. Gadget and buttons

Gadgets	Description
	Assistance – click this button if you want to request supervisor assistance.
	Available – click this button to change your status to “Released.”
	Callback – click this button to create a call back.
	Calls menu – click this button to view all active calls.
	Dashboard – click this button to open the dashboard in a separate tab.
	E-mail – click this button if you want to send an e-mail message.
	Historical reports – click this button to open historical reports in a separate tab.
	Logout – click this button if you want to log out.
	Messageview – insight view of all email and callback folders
	Outgoing call – click this button if you want to set up an outgoing call.
	Playback – click this button to listen to recordings in a separate tab.
	Released – click this button to change your status to “Available.”
	Settings – click this button to change your settings.
	Supervisor – click this button to display the supervisor tab.

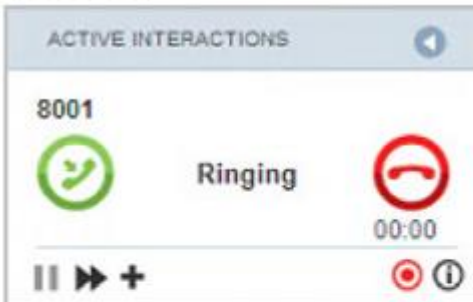
	Voicemail – click this button to retrieve your personal voicemail.
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Button	Description
	Answer – for taking a call.
	Hang up – for rejecting or terminating a call.
	Broadcast – click this button to send a broadcast message.
	Call – click this button if you want to set up a call to a selected user or endpoint.
	Call information – click this button to display call information.
	Callback – click this button to create a callback.
	Canned phrases – click this button to use predefined sentences to answer an e-mail message.
	Dial pad – click this button to open the numeric keypad.
	Headset volume – click this button to mute the call.
	Hold – click this button to place a call on hold.
	Microphone volume – click this button if you want to change the volume if your headset.
	Monitor – click this button to see the type of monitoring.
	More options – click this button to be able to see more options.
	Record – click this button to record a call.
	Remote logout – click this button to remotely log out an agent.
	Wrap-up – click this button if you want to end a call with a wrap-up.
	Xfer/Conf – click this button if you want to forward a call or set up a conference call.

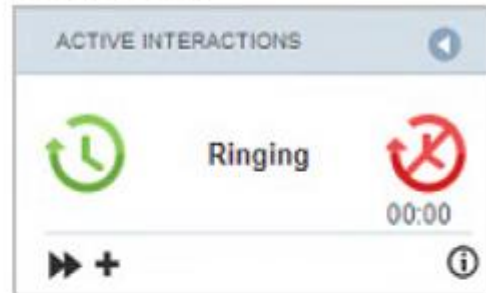
7. Incoming e-mail, callback or chat conversation

When a call comes in, regardless of the type of call, a pop-up appears in the menu. The pop-up indicates what type of call it is and what the caller's phone number is. If you want to take the call, click the green icon. If you are unable to take the call without having set your status to released, you can reject the call using the red icon.

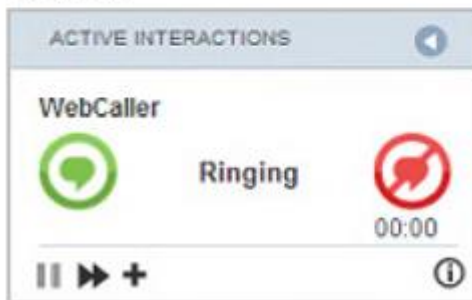
Voice call



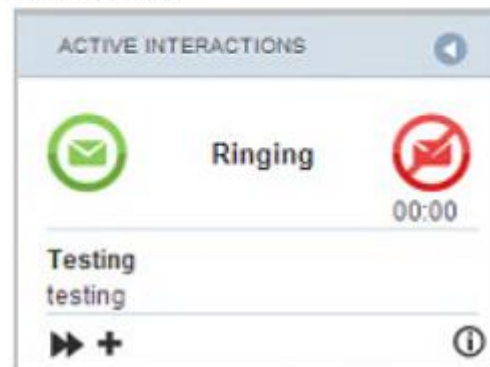
Callback call



Chat call



E-mail call

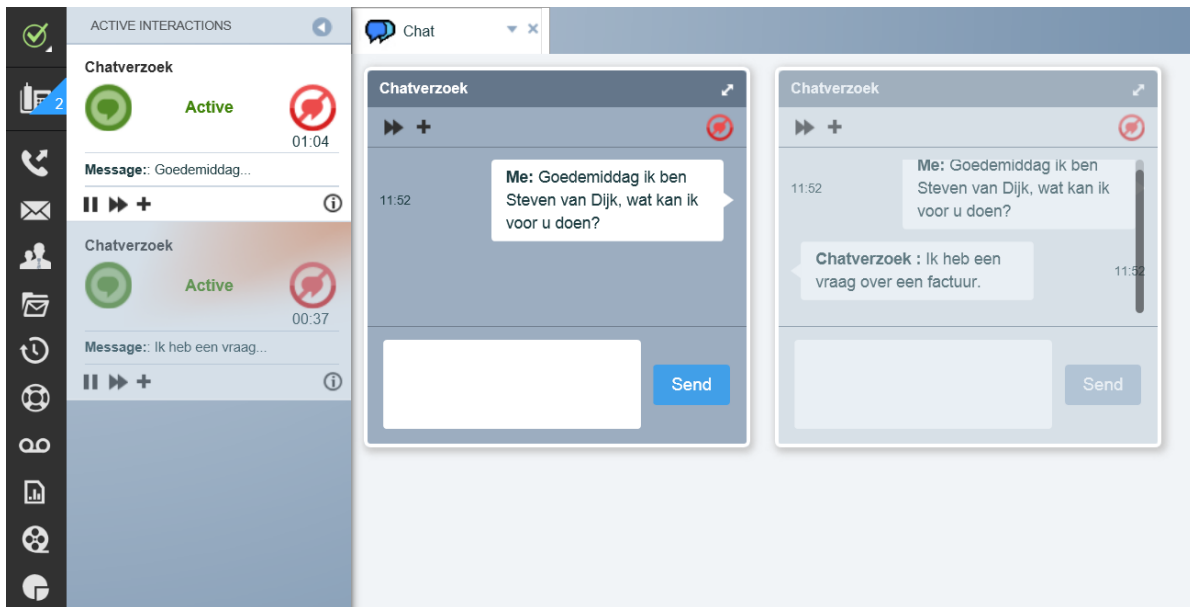


Voicemail



Conducting a chat conversation

If a chat conversation is offered and answered, the chat box will be opened. An agent can run multiple chat conversations (max 9) simultaneously. If a chat is active but not in the foreground, the orange glow shows the agent if a chat conversation has been updated or the maximum timeout has been reached.

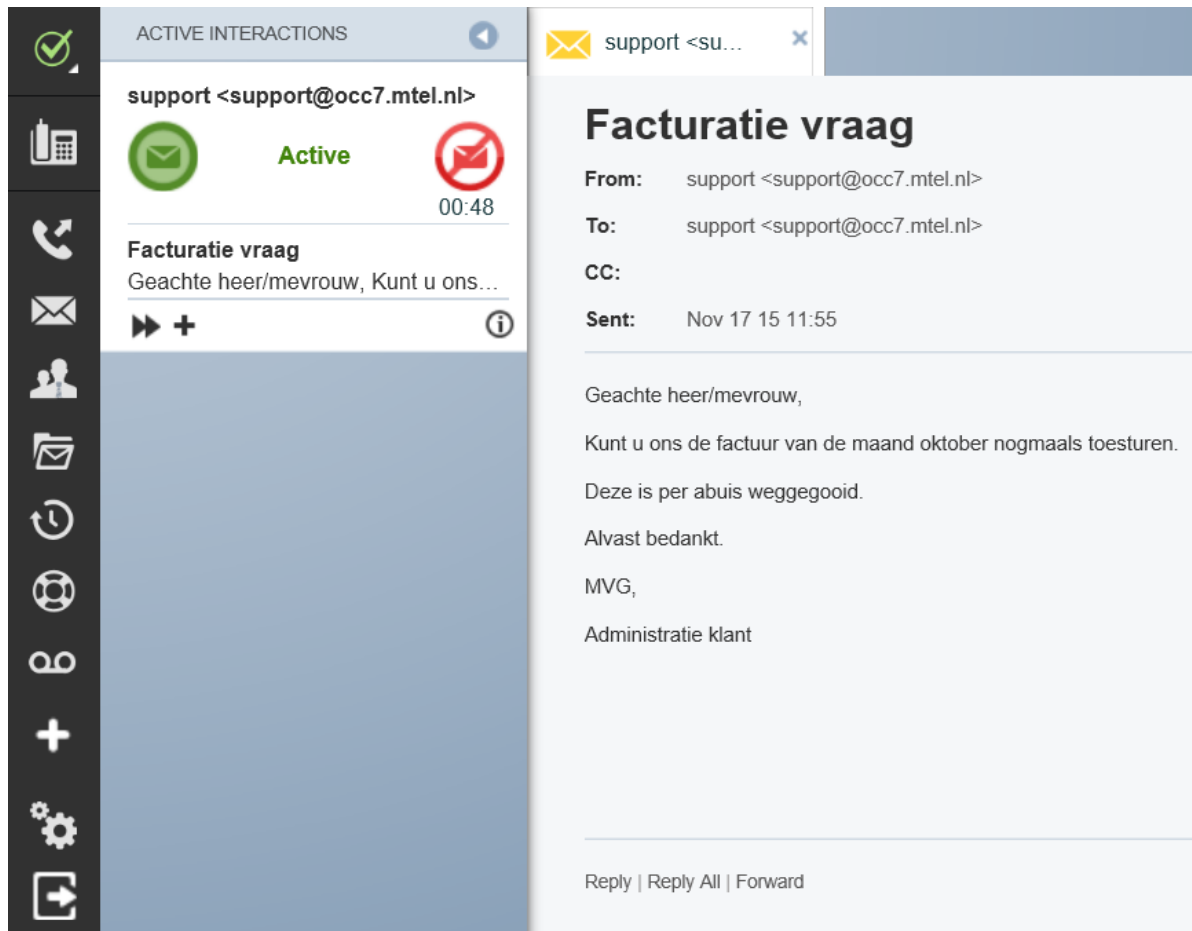


During an active chat conversation, you have the following options:

Action	Select
Placing a conversation on hold	
Forwarding a conversation or setting up a conference call	▶▶
Answering a conversation if it is not automatically answered	+ and then 🎯
Entering a wrap-up before the conversation is terminated	+ and then 🗑️
Planning a callback	+ and then 🕒
Changing the size of the chat box	↗️
Using canned phrases	💬
Viewing conversation information	ℹ️
Re-opening a chat box	The chat conversation in the call menu
Terminating a conversation	🚫

Conducting an e-mail conversation

After answering an e-mail call, an e-mail tab will be opened.

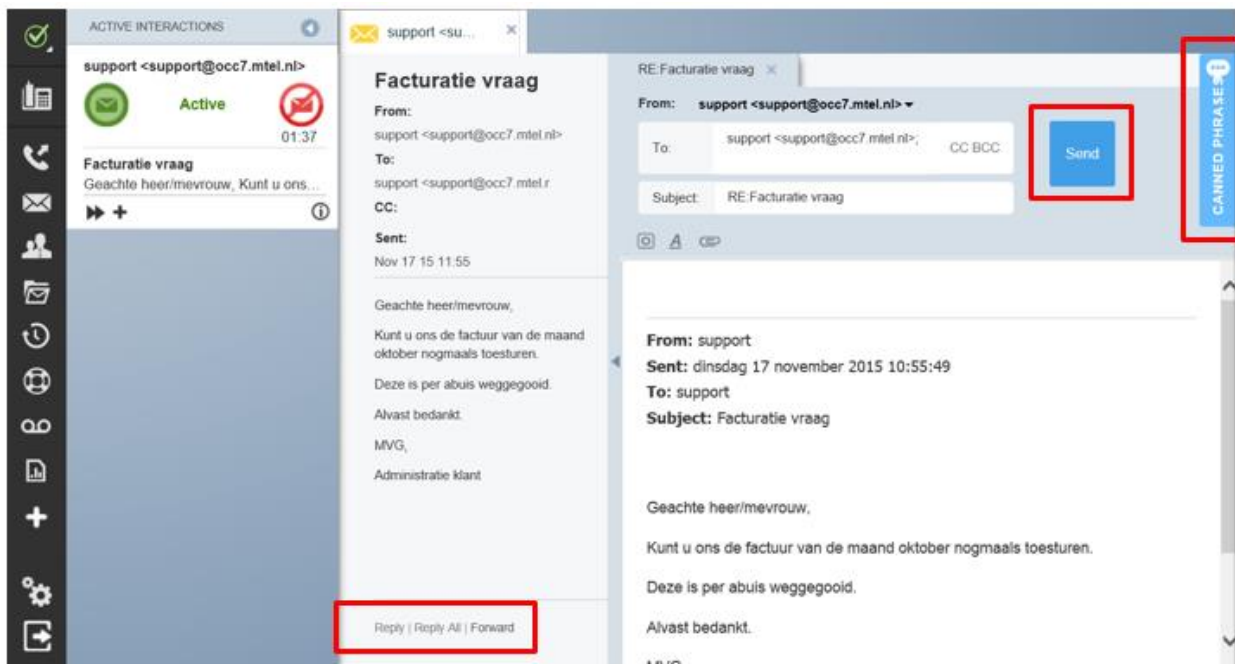



During an active e-mail conversation, you have the following options:

Action	Select
Forward a conversation or set up a conference call	
Entering a wrap-up before the conversation is terminated	and then
Planning a callback	and then
Viewing the conversation information	
Terminating a conversation	

When you want to reply to an e-mail or forward the e-mail message:


1. On the e-mail tab, at the bottom of the page, choose reply, reply all, or forward.



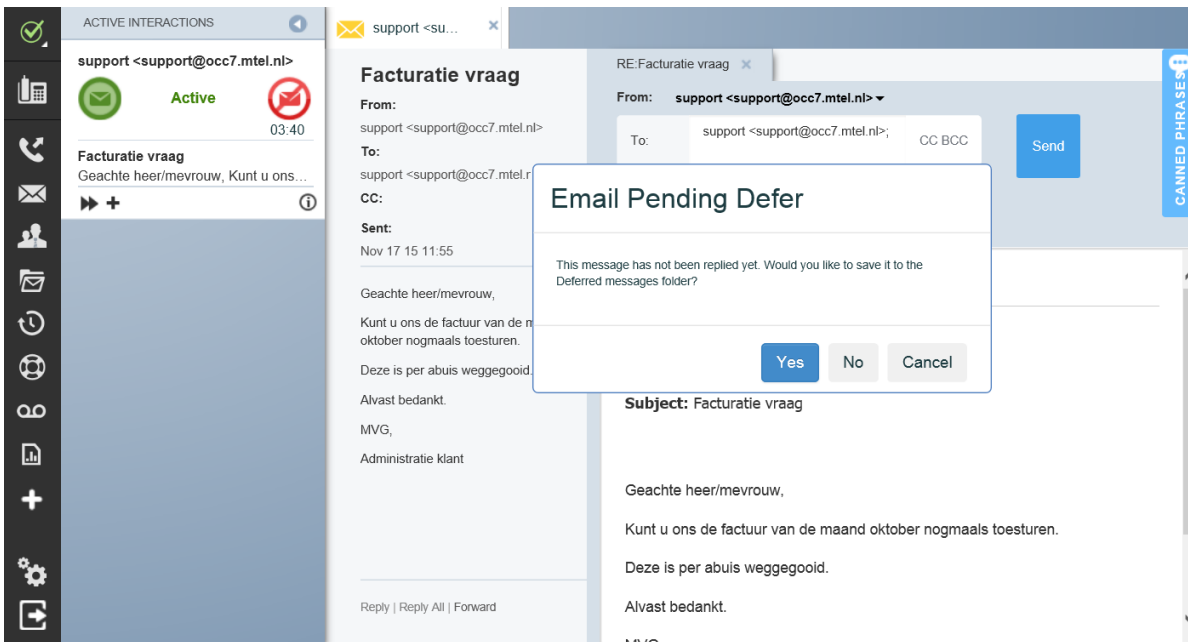
2. Type your e-mail message.
3. Optionally, via Canned Phrases, you can add pre-defines texts to your message.
4. When your message is ready to be sent, click Send.
5. Under Active Interactions, click  to terminate the conversation.
6. Select a wrap-up to finish the conversation with.

Defer & Pull email

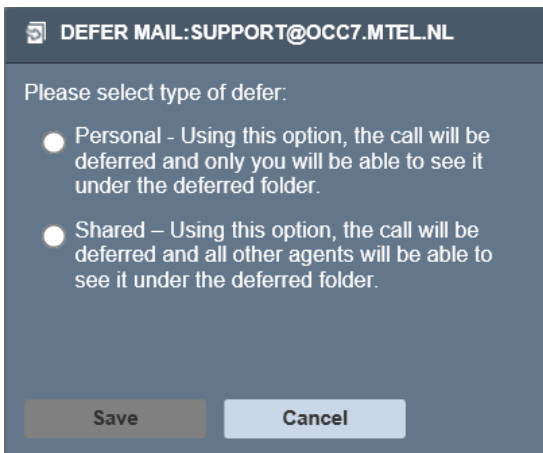
Agents and Supervisors can defer incoming email calls. With this feature they can temporarily put the email call they are handling at that time on hold and be available for incoming voice calls when necessary. During email call handling agents are not available for other calls. When an agent/supervisor notice that the inbound voice queue is growing they can decide to defer the email they are working on and handle the voice call.

After handling the voice call the agent can click on the  Messageview button – Deferred Emails to proceed with the deferred email call. In this chapter we will explain which steps need to be taken to defer an email call and handle it at a different time.



Step 1: When wrihting a reply to an incoming email call click during the call on the red “hang-up” button. The system will ask you if you would to defer the email call. Select Yes to defer.

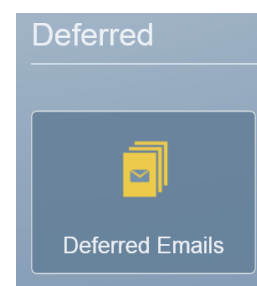


Step 2: You now need to decide if you would like to defer the email call to your personal defer folder or to the shared defer folder. If you defer the email to the personal defer folder you are the only agent who can handle this call later on. If you defer the call to the shared folder every agent or supervisor can pull this email and handle the email call later on.



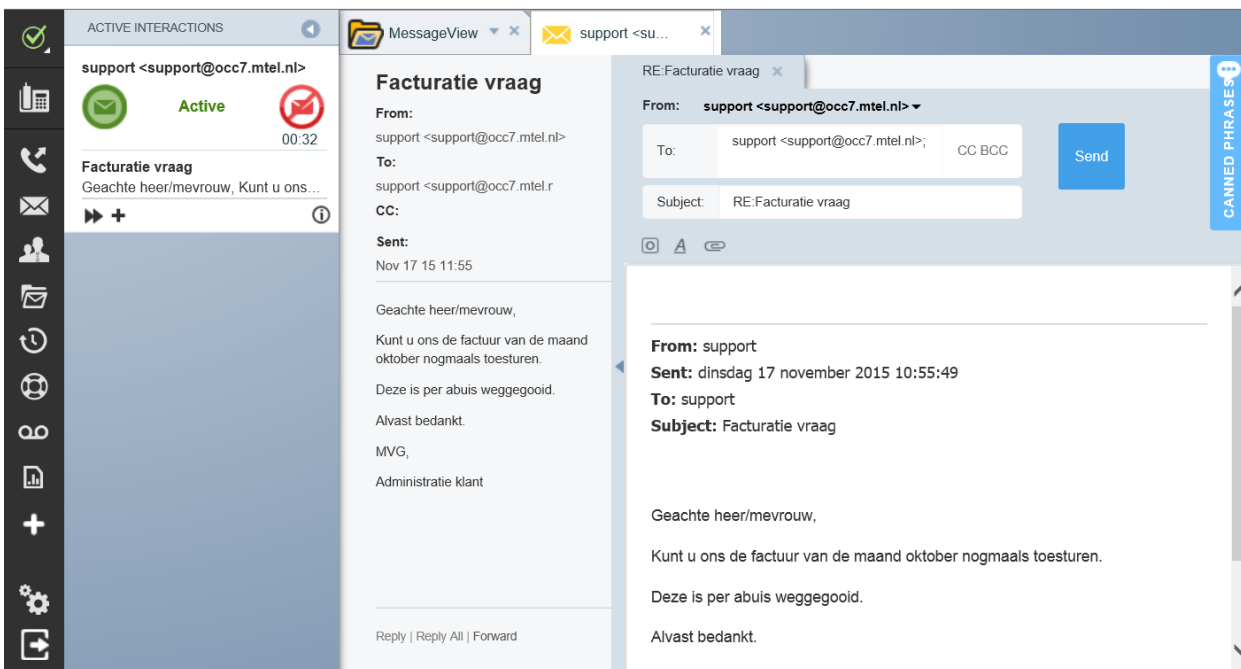
Step 3: In this example the users defers the call to the Personal folder.

Step 4: Click in the Gadgettory on the Messageview  button. Select the Deferred Emails folder. In this folder you will find all your deferred emails. In the following screenshot you can see the deferred email call. Click on the email to see a preview or select  pull to proceed with it.





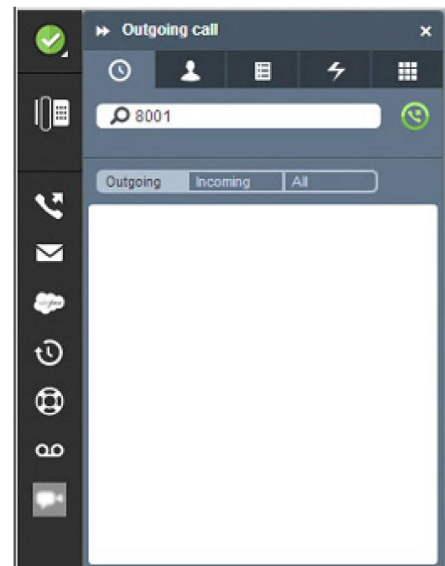


Step 5: This email will now be offered to the agent. After you created the reply, press send and wrap-up the call.










Following up a callback

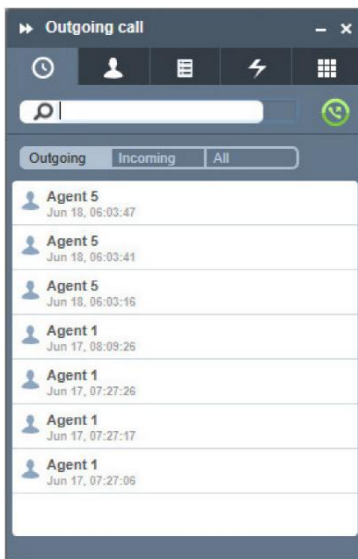
When you are offered a callback, you can accept it via . The outgoing call screen will open. The number to be called will already be indicated here. In this example, it is 8001. To initiate the call, click  again. To end the call, hang up and select a wrap-up code.





7.1. Setting up a call

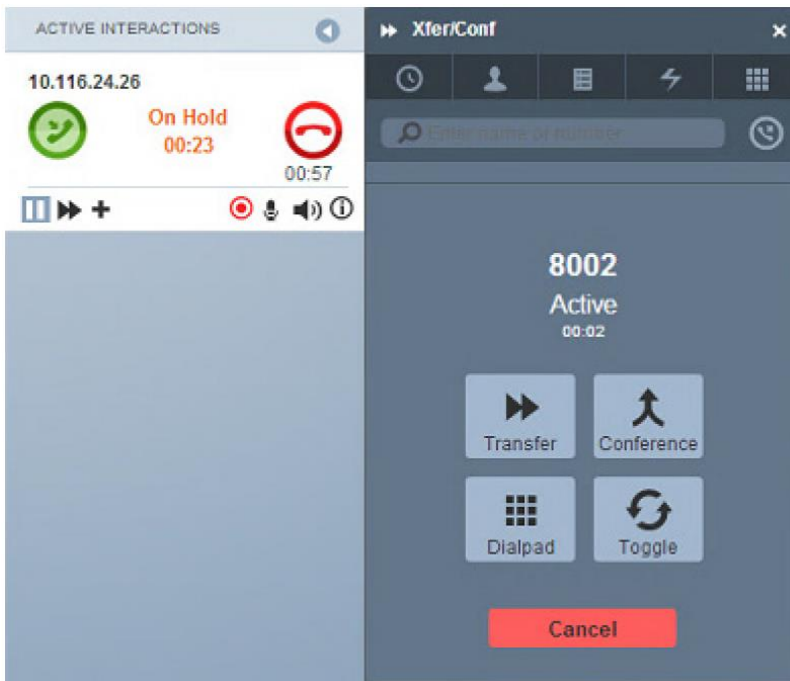
If you want to set up a call, you have several options. Click  or press Ctrl + Backspace. The screen for setting up outgoing calls will open. You have the following options:

Select	Click	Action
The search function		Enter the number or name of the person you want to call.
A recent outgoing or incoming call		To filter the list by outgoing or incoming callers, click outgoing or incoming. Then, select the user.
A user who is logged in		To filter the list by status or group, click the corresponding downward arrow and select the required group or status.
A system endpoint		When you want to return a call to a specific place in the system, e.g. a queue.
A speed dial		Click the speed dial
Numeric keypad		Enter a phone number









7.2. On hold, forwarding, conference

If you want to place a call on hold, click the hold button  or press Win + F2. You can forward a call via the transfer button  or by pressing Win + F7.





You have the following options:

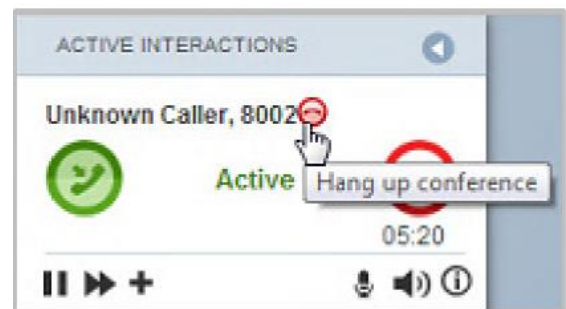
Select	Click	Action
The search function		Enter the number or name of the person you want to call.
A recent outgoing or incoming call		To filter the list by outgoing or incoming callers, click outgoing or incoming. Then, select the user.
A user who is logged in		To filter the list by status or group, click the corresponding downward arrow and select the required group or status.
A system endpoint		When you want to return a call to a specific place in the system, e.g. a queue.
A speed dial		Click the speed dial
Numeric keypad		Enter a phone number

Once the call is set up, you can do the following:

1. You can forward the call and terminate it yourself after forwarding.
2. Set up a conference call by clicking conference.
3. Via toggle, you can switch between two ongoing voice calls. From the moment the second call is active, the conference, transfer, and toggle functions can be used.

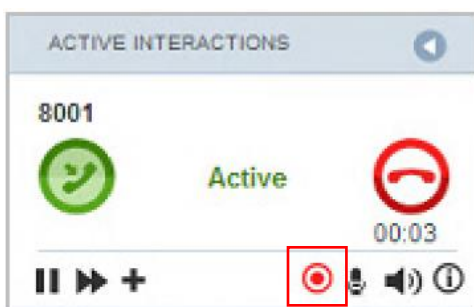
Ending the conference call for the most recently added participant



If you want to end the conference call for the most recently added participant, click  next to that participant. If you want to leave the conference call yourself, click  next to Active or press Win + F12.



7.3. Recording

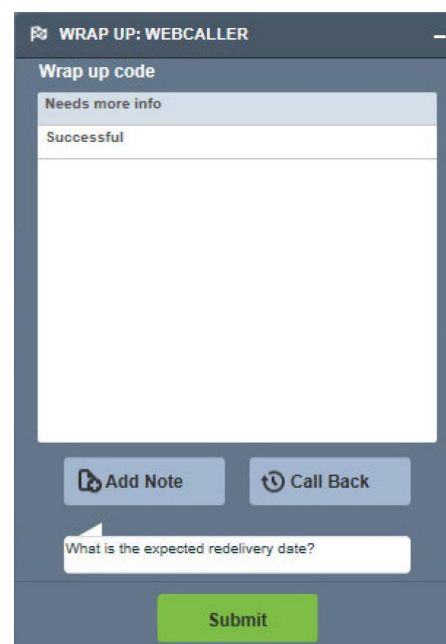
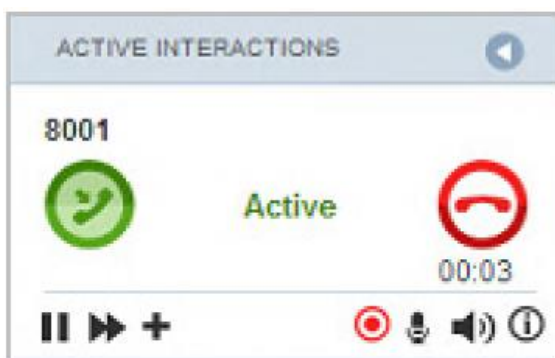
If you have purchased the recording option, you can record calls. If calls are automatically recorded, the recording icon will be red.



If calls need to be recorded manually, you should click  and then  before taking a call. If the recording button is clicked during the call, it will be recorded from that moment on. Chat conversations can all be recorded simultaneously.

7.4. Terminating a call and wrap-up

After a call, you can complete it using a wrap-up code. This code can indicate the result or subject of the call.




1. Terminate the call by clicking the red icon;
2. After ending the call, the wrap-up screen appears;
3. Select 1 of the available wrap-up codes;
4. Optionally, you can add a note via Add Note;
5. Optionally, you can create a callback via the callback button;
6. Click Submit.

7.5. Planning a callback

There are three ways to plan a callback. Via the gadgetory, in the call menu, or from the wrap-up screen.

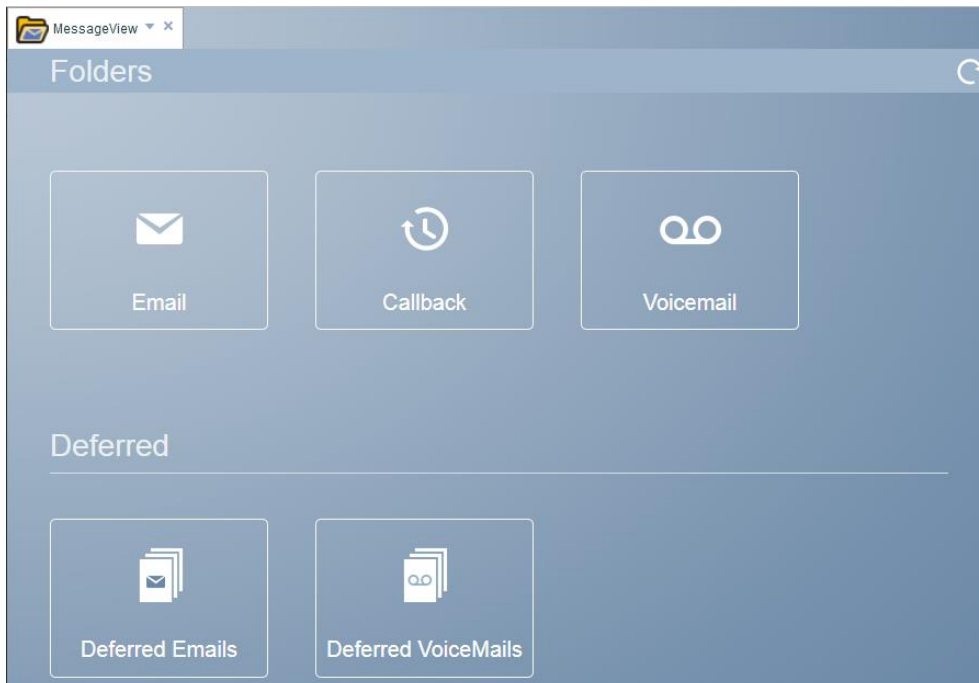
1. Enter the name of the person to be called in the Name field.
2. If the number does not appear automatically, enter the number manually.
3. Under Date, select today, tomorrow, 1 week, or 2 weeks, or select a specific date via the calendar.
4. Under Time, choose a defined time via one of the quick buttons or indicate a specific time.
5. If you want to receive the callback at a specific time, check Call me.
6. Use Immediate Dialing if you want to set up the call directly after taking the callback.
7. Under Message, you can add a note that is displayed when offering the callback call.
8. If you are using a CRM integration and customer cards which can be retrieved via a URL, you can enter the URL for the relevant customer card here.

7.6. Using Canned Phrases

Canned Phrases are pre-defined phrases you can use in responding to a chat or e-mail conversation. These phrases can be selected and added via . If you click this button, the Canned Phrases screen will open. You can search pre-defined phrases by their content or select them based on their structure. After selecting a phrase, click Use. The phrase will now be used in the e-mail or chat message.

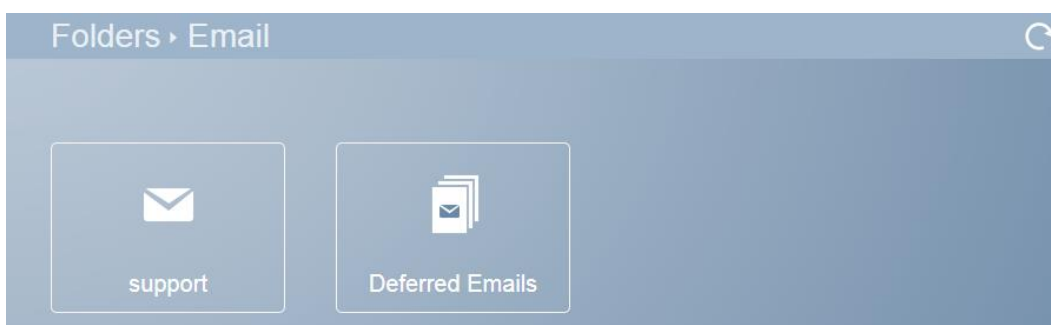
7.7. Messageview agent

The Messageview offers the agent all the email, callback and defer folders. By pressing the MessageView button the following screenshot will be shown. You can open one of these folders to see the content. With the white arrow you can refresh the content of the folder.

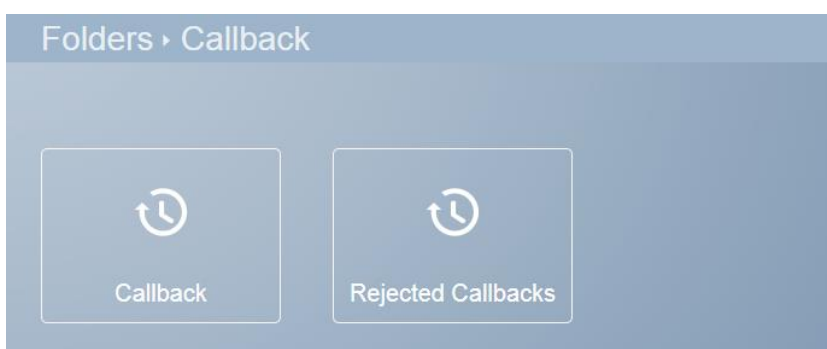


Folders

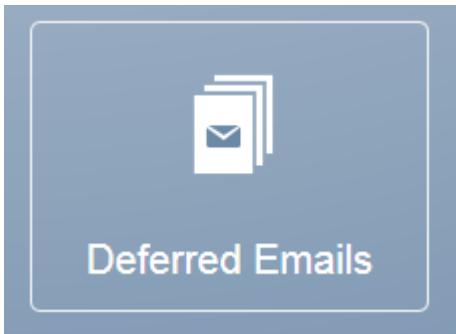
Email: The email folder shows folders of individual email queues and the deferred emails folder.



Callback: This folder shows Callbacks and Rejected Callbacks.



Deferred: Overview of email calls deferred by the agent and deferred calls by other agent in the same group who deferred these email calls to the shared folder.



Keyboard shortcuts

Via hotkey shortcuts, agents are able to execute a number of standard operations quickly. When a letter is underlined on your screen, you can execute a function by pressing <ALT> and that key. For example, you can use <ALT> + <V> to change your availability. The following hotkey combinations are available:

Hotkey combination	Operation
Ctrl + Backspace	Set up a new call
Win + F2	Place a call on hold or retrieve it
Win + F3	Switch between availability statuses
Win + F6	Take a call
Win + F7	Forward a call or set up a conference
Win + F9	Maximize the user interface
Win + F12	Terminate the call


8. Supervisor interface

When you log in as a supervisor, you have the option of using supervisor functionality. The following four functionalities can be displayed for use in the form of tabs:


- Dashboard
- Supervisor
- Recorder
- Historical Reports




1. Dashboard

Via the Dashboard, the supervisor can access and view real-time statistics of the call center. The real-time dashboard can be customized by the supervisor. To retrieve Real-time Reports, click . For more information about the Dashboard, please refer to the Dashboard User Manual.


2. Supervisor

Through the supervisor tab, the contact center administrator can monitor all agents. The supervisor tab can be retrieved by clicking the  button.

3. Recorder

The recorder provides the supervisor access to all recorded conversations. This tab can be retrieved by clicking .

4. Historical Reports

For viewing and analyzing historical data, the supervisor is able to see different reports. To open the historical reporting tab, the supervisor must click . For more information about the historical reports, please refer to the Historical Reports Manual.

9. Supervisor features

The supervisor has the option of using the following functionalities to monitor and manage his agents:

- Monitoring agents;
- Accepting an assistance request;
- Initiating an assistance request;
- Sending a broadcasting message;
- Remotely logging out one or more agents.

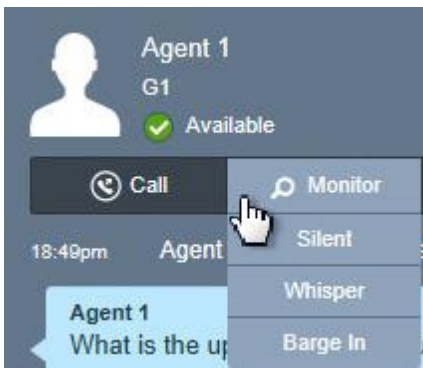
9.1. Monitoring agents

Supervisors have the ability to monitor voice, chat, and e-mail conversations. The following monitoring functionalities can be deployed:

Monitoring mode	Conversation type
Silent – for listening to or viewing the dialogue	Voice, chat, or e-mail
Whisper – For listening to a live call and providing advice to the agent. (Only the agent hears the supervisor in this mode)	Voice only
Barge in - For listening to a live call and being able to barge in. (Both the agent and the caller can hear the supervisor in this mode)	Voice only

To monitor an agent, follow these steps:


1. Click the agent you want to monitor;
2. Click monitor within the agent card and select the desired mode;

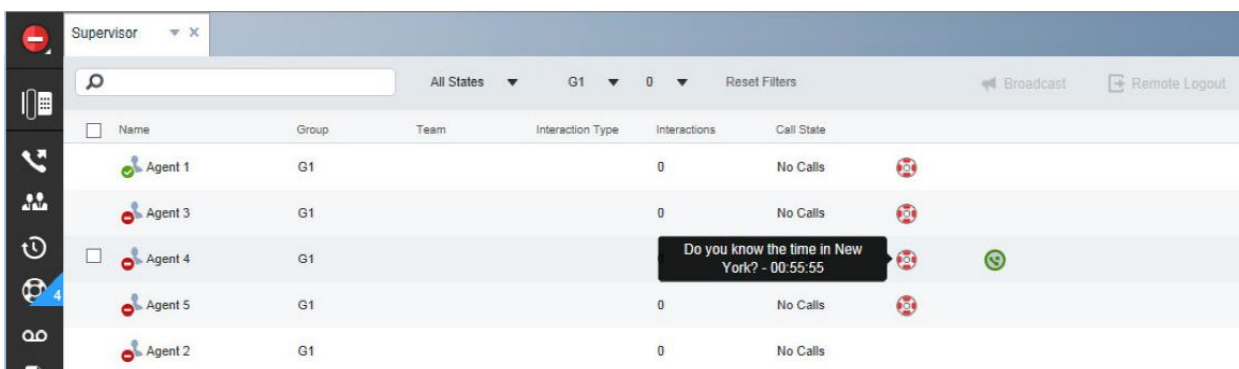


3. To switch between monitoring modes, select a different mode;
4. To stop monitoring an agent, click stop.

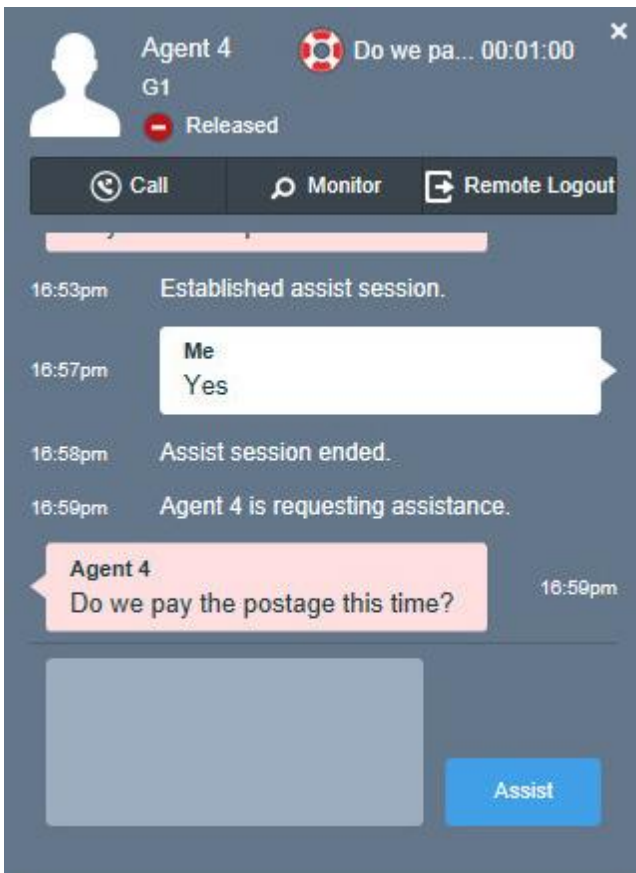
You can activate the monitoring of an agent without the agent having a live call. Follow the steps above. As soon as the agent receives a call, the monitoring function will activate.

9.2. Accepting an assistance request

Agents have the ability to request help via assistance request. By clicking the buoy icon, the supervisor will see the request in the monitoring screen. Select the agent you want to assist and click  to start the chat session with the agent.



The screen below will open. Click **Assist**, enter your response, and click **send**. To stop this assistance session, click **End Session**.




9.3. Initiating an assistance request

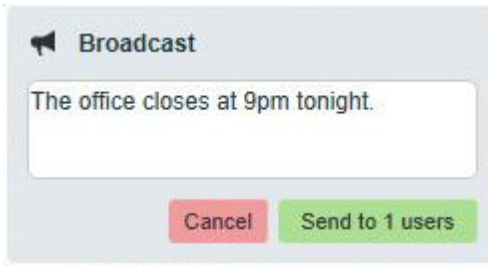
If you want to offer an agent assistance without that agent having requested it, follow these steps:

1. Double-click the agent you want to offer assistance;
2. Select Assist;
3. Enter the desired message;
4. Click Assist;
5. When you want to end the session, click End Session.

9.4. Sending a Broadcast Message

The supervisor has the option of sending broadcast messages to one or more agents. These are messages which an agent cannot answer.


1. Select the agents to whom you want to send a broadcast message;
2. Click  Broadcast ;
3. The screen below will open;



4. Enter the message and click Send.

9.5. Remotely logging out an agent

The supervisor can log out agents remotely using the Remote logout function.

1. Select the agents to whom you want to send a broadcast message;
2. Click  Remote Logout ;
3. The screen below will open;

Remote Logout

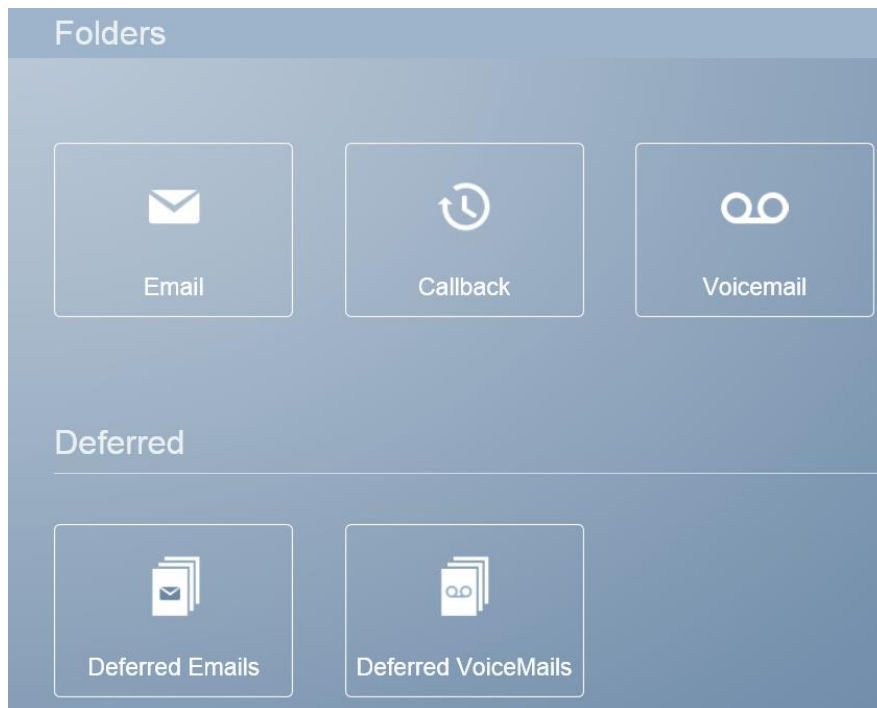
You are about to log Agent 1 out. Active calls will be interrupted. Are you sure?



4. Click OK to log out the selected agent.

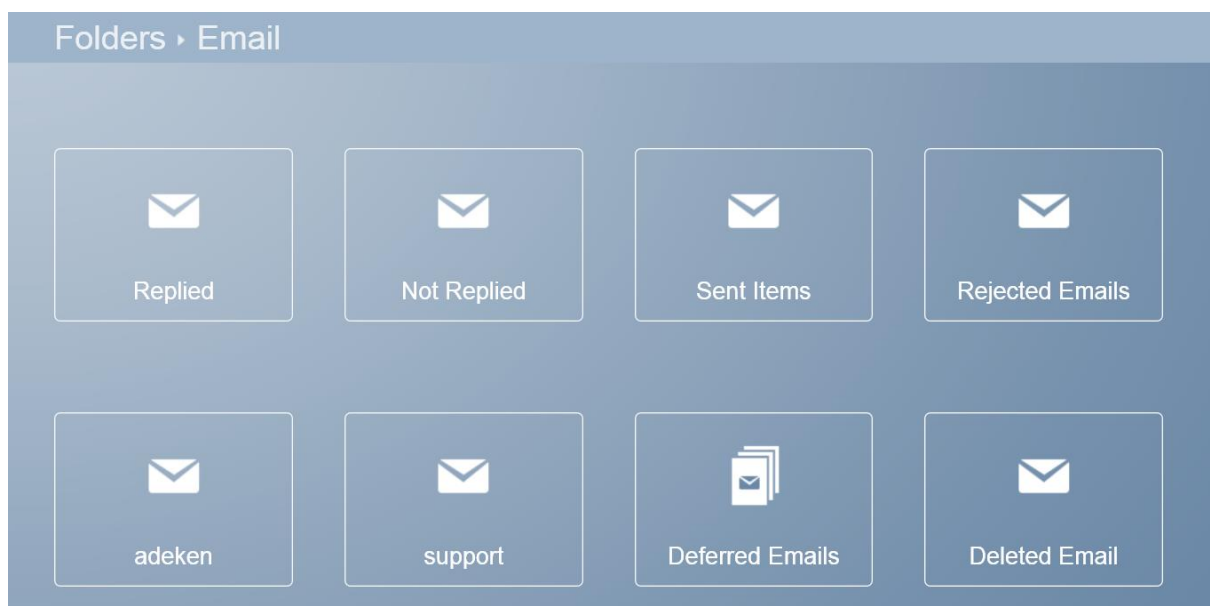
9.6. Messageview Supervisor

The Messageview option in the Supervisor interface offers the Supervisor the ability to have an insight view of all email, callback, voicemail and deferred email folders.



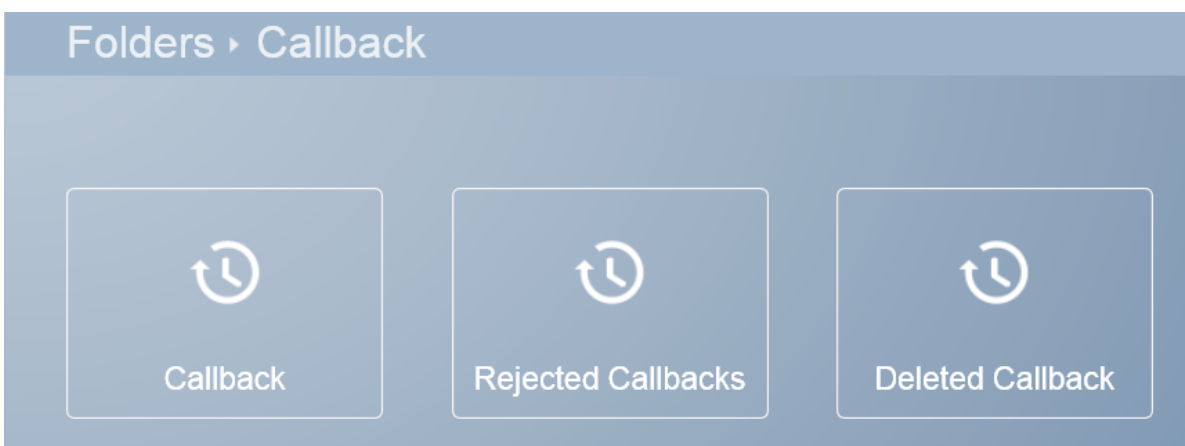
Folders

Email: This folder shows all email folders that are assigned to individual email queues. Besides these queues the supervisor can also see all the deferred emails of agents and himself. In the following example support and adeken are both email queue folders. When there are multiple email queues the supervisor will see them all.



Available email folders	
Replied	Shows all email calls that are handled. Note: Emails in this folder are not the original ones but the replies to those.
Not Replied	Shows all email calls that are answered by the agent but not handled. These emails are not deferred but hang after answering the incoming email call.
Sent Items	Shows all sent email calls for each queue/sender.
Rejected Emails	Shows all email calls offered to an agent but the agent didn't reply these email calls. Calls where hung up after answering the call.
Support & adeken	Support & adeken are examples of e-mail queues. These folders show email calls in queue. Every queue has its own folder.
Deferred Emails	Shows all personal and shared deferred email calls.
Deleted Emails	This folder contains all email calls that are deleted by the supervisor.

Callback: The folder callback shows scheduled, rejected and deleted callbacks.



Beschikbare Callback folders	
Callback	Contains all scheduled callbacks of the group the supervisor is member of.
Rejected Callbacks	Shows all rejected callbacks within the group the supervisor is member of.
Deleted Callback	This folder contains all callbacks that are deleted from the folder callback.

Deferred

In this folder all email calls are shown that are temporarily deferred. This folder contains Personal and Shared (group) deferred email.

Sender	Preview	Deferred	Arrival Time
support support	Personal defer Personal Defer	Nov 17, 2015, 02:08 PM By: Agent 1	Nov 17, 2015, 02:07 PM
support support	Deferred group Group Defer	Nov 17, 2015, 02:06 PM By: Agent 1	Nov 17, 2015, 02:05 PM

This overview can like any other folder be filtered based on date or on sender. Via the kalender icon a date can be selected.

The screenshot shows the 'Email > Deferred Emails' interface with a date selection calendar overlay. The calendar is titled 'Start Date' and 'End Date' and shows the month of November 2015. The calendar grid includes days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates from 01 to 07. There are 'Today', 'Clear', and 'Search' buttons at the bottom of the calendar overlay.

By clicking one of the deferred deferred emails a preview will be shown. From this view agents or supervisors can read the content of the email and pull the email to proceed answering it. Supervisor have the ability to delete deferred email calls from this folder.

The screenshot shows the email preview for 'Personal defer'. The header includes 'From: support <support@occ7.mtel.nl>', 'To: support <support@occ7.mtel.nl>', and 'CC:'. The 'Arrival:' time is 'Nov 17 15 14:07'. The 'Deferred:' status is shown with 'Pull' and 'Remove' icons. The main content of the email is 'Personal Defer'.